APPENDIX 1

COMPETING CENTRES

APPENDIX 1A

MARKET SHARE AND TRADE RETENTION

Cambridge City Council and South Cambridgeshire District Council
Cambridge Sub Region Retail Study 2008

TABLE 1

COMPARISON GOODS ALLOCATION 2007

% MARKET SHARE

	RETAIL LOCATION	ZONE 1 %	ZONE 2 %	ZONE 3 %	ZONE 4 %	ZONE 5 %	ZONE 6 %	ZONE 7 %	ZONE 8 %	ZONE 9 %	ZONE 10 %	ZONE 11 %	ZONE 12 %	ZONE 13 %	ZONE 14 %	ZONE 15 %	ZONE 16 %	ZONE 17 %	ZONE 18 %	ZONE 19 %	ZONE 20 %
1	Cambridge	62.7	69.2	63.1	65.0	69.5	55.5	32.2	5.3	13.8	5.7	7.4	24.7	34.8	15.9	45.6	5.6	10.9	14.5	3.3	8.8
2	Peterborough	1.3	0.3	1.2	0.9	0.0	0.0	3.4	2.3	0.0	0.0	0.2	0.0	0.3	0.0	0.8	0.0	23.7	37.6	34.9	0.0
3	Bury St Edmunds	0.9	0.0	0.8	0.6	0.2	1.2	2.0	18.3	52.4	12.4	0.2	14.4	9.7	4.0	0.4	0.0	0.0	0.0	0.0	0.0
4	Ely	0.9	0.5	3.9	0.6	0.0	0.0	34.5	2.0	0.3	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.5	1.3	0.0
5	Stevenage	0.0	0.0	0.0	0.4	1.0	0.0	0.0	0.2	0.0	0.2	0.4	0.0	0.4	0.0	14.8	16.7	0.0	0.0	0.0	20.2
6	Newmarket	1.2	1.0	5.7	0.0	0.2	8.5	3.3	0.8	7.2	0.0	0.0	42.1	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.2
7	Bedford	0.0	0.0	1.2	0.7	0.0	0.0	0.2	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	22.3	4.7	0.0	0.0	0.3
8	Huntingdon	0.0	0.0	1.9	1.1	0.0	0.2	0.1	0.0	0.0	0.2	0.0	0.0	0.5	0.0	0.0	0.0	25.5	18.1	2.9	0.2
9	Bishop Stortford	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	21.0	0.0	0.0	7.2	0.0	0.4	0.0	0.0	0.0	9.6
10	King's Lynn	0.0	0.0	0.4	0.0	0.0	0.0	2.3	30.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.5	0.0
11	Colchester	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	23.9	2.7	0.0	1.0	13.2	0.0	0.0	0.0	0.0	0.0	0.0
12	St Neots	0.0	0.2	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2	17.5	0.2	0.1	0.0
13	Sudbury	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	19.2	0.2	0.0	0.3	24.8	1.0	0.4	0.0	0.0	0.0	1.3
14	St Ives	0.3	0.4	0.5	3.8	0.1	0.0	0.6	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.8	1.7	13.3	0.7	0.1
15	Chelmsford	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	3.7	13.2	0.0	0.3	0.8	0.0	0.0	0.0	0.0	0.0	0.0
16	Milton Keynes	0.7	0.2	0.2	0.2	0.3	0.0	0.2	0.0	0.0	0.0	0.0	0.3	0.0	0.4	0.0	4.7	0.5	0.0	0.3	1.4
17	Norwich	0.3	0.9	0.0	0.2	0.7	0.4	1.5	5.7	0.7	0.4	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3
	SUB-TOTAL	**68.2**	**72.7**	**78.8**	**73.9**	**72.4**	**65.7**	**80.5**	**65.9**	**76.5**	**65.7**	**45.3**	**82.8**	**47.6**	**66.2**	**62.6**	**54.2**	**84.4**	**84.3**	**46.1**	**42.2**
	Other	31.8	27.3	21.2	26.1	27.6	34.3	19.5	34.1	23.5	34.3	54.7	17.2	52.4	33.8	37.4	45.8	15.6	15.7	53.9	57.8
	TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Household Survey, March 2008

TABLE 2
COMPARISON GOODS ALLOCATION 2007
SPEND (£)

	RETAIL LOCATION	ZONE 1 (£000)	ZONE 2 (£000)	ZONE 3 (£000)	ZONE 4 (£000)	ZONE 5 (£000)	ZONE 6 (£000)	ZONE 7 (£000)	ZONE 8 (£000)	ZONE 9 (£000)	ZONE 10 (£000)	ZONE 11 (£000)	ZONE 12 (£000)	ZONE 13 (£000)	ZONE 14 (£000)	ZONE 15 (£000)	ZONE 16 (£000)	ZONE 17 (£000)	ZONE 18 (£000)	ZONE 19 (£000)	ZONE 20 (£000)	**TOTAL (£000)**
1	Cambridge	126,175,740	134,898,574	80,675,872	63,482,871	56,562,136	30,985,866	63,409,854	6,318,303	14,391,777	6,913,415	9,558,203	26,759,305	30,763,708	14,990,919	57,112,581	8,857,441	31,864,383	27,440,081	3,669,080	19,651,157	**814,481,267**
2	Peterborough	2,641,850	509,579	1,567,366	847,601	0	0	6,648,943	2,762,577	0	0	290,069	0	231,149	0	1,029,128	0	69,214,532	71,264,071	38,398,980	0	**195,405,844**
3	Bury St Edmunds	1,775,695	0	1,004,987	580,190	145,883	649,561	3,960,405	21,708,658	62,224,752	14,961,145	257,189	15,592,729	8,615,376	3,755,675	443,792	0	0	0	0	0	**135,676,037**
4	Ely	1,721,655	1,065,483	4,954,170	589,917	0	0	67,895,996	2,385,249	338,495	0	0	565,769	0	0	0	0	0	989,681	1,440,174	0	**81,946,589**
5	Stevenage	0	0	0	430,541	809,148	0	0	196,632	0	269,168	519,373	0	378,745	0	18,517,049	26,389,857	0	0	0	45,111,804	**92,622,318**
6	Newmarket	2,468,695	2,002,803	7,355,412	0	168,532	4,766,017	6,581,158	977,773	8,537,785	0	0	45,581,775	342,013	0	0	0	0	0	0	463,609	**79,245,571**
7	Bedford	0	0	1,476,491	685,825	0	0	438,930	1,325,284	0	0	0	0	0	0	0	35,190,190	13,809,666	0	0	584,550	**53,510,936**
8	Huntingdon	0	0	2,371,460	1,072,691	0	107,908	292,145	0	0	216,353	0	0	474,950	0	0	0	74,430,014	34,355,855	3,208,926	463,045	**116,993,347**
9	Bishop Stortford	0	0	0	0	0	0	0	0	0	0	27,293,668	0	0	6,826,386	0	649,279	0	0	0	21,396,845	**56,166,177**
10	King's Lynn	0	0	474,647	0	0	0	4,573,444	35,915,853	0	0	0	0	0	0	0	0	0	0	2,777,899	0	**43,741,843**
11	Colchester	0	0	0	0	0	0	0	0	633,892	28,792,117	3,541,229	0	862,056	12,425,771	0	0	0	0	0	0	**46,255,065**
12	St Neots	0	404,149	0	552,181	0	0	0	0	0	0	0	0	0	0	0	5,111,254	51,040,548	396,576	85,201	0	**57,589,909**
13	Sudbury	0	0	0	0	0	0	0	0	1,794,530	23,142,395	257,189	0	231,149	23,392,981	1,268,963	705,790	0	0	0	2,817,387	**53,610,383**
14	St Ives	573,885	723,634	668,487	3,671,821	63,027	0	1,243,676	0	164,309	0	0	0	0	0	0	1,262,840	4,860,255	25,177,978	786,897	158,930	**39,355,738**
15	Chelmsford	0	0	0	0	381,029	0	0	0	0	4,478,742	17,124,820	0	231,149	727,468	0	0	0	0	0	0	**22,943,208**
16	Milton Keynes	1,320,925	403,657	229,465	175,258	208,910	0	379,943	0	0	0	0	271,118	0	349,833	0	7,460,935	1,531,708	0	287,259	3,243,430	**15,862,441**
17	Norwich	573,885	1,789,116	0	175,258	537,468	223,207	2,867,294	6,742,619	830,524	447,525	0	847,904	0	0	0	0	0	0	0	584,550	**15,619,350**
	SUB-TOTAL	**137,252,330**	**141,796,993**	**100,778,357**	**72,264,154**	**58,876,133**	**36,732,559**	**158,291,787**	**78,332,949**	**88,916,063**	**79,220,859**	**58,841,741**	**89,618,600**	**42,130,294**	**62,469,034**	**78,371,513**	**85,627,585**	**246,751,106**	**159,624,243**	**50,654,415**	**94,475,308**	**1,921,026,022**
	Other	64,127,529	53,273,212	27,172,334	25,460,235	22,469,122	19,139,683	38,433,489	40,446,921	15,443,392	41,418,520	71,165,348	18,671,580	46,355,014	31,835,706	46,809,749	72,314,486	45,436,617	29,804,087	59,310,282	129,294,612	898,381,921
	TOTAL	**201,379,859**	**195,070,206**	**127,950,691**	**97,724,389**	**81,345,255**	**55,872,243**	**196,725,276**	**118,779,870**	**104,359,455**	**120,639,379**	**130,007,089**	**108,290,180**	**88,485,308**	**94,304,740**	**125,181,262**	**157,942,071**	**292,187,723**	**189,428,330**	**109,964,697**	**223,769,920**	**2,819,407,943**

APPENDIX 1B

RETAILER REPRESENTATION

Competing Centres: Retailer Representation

Centre	*Shopping Centres*	*Key Anchors*	*Department Stores*
Peterborough	• Queensgate Centre (1982), 74,785 sqm gross • Hereward Cross Centre (1967), 7,896 sqm gross • Rivergate Centre (1989), 11,148 sqm gross.	Marks & Spencer, Bhs, Argos Extra, Wilkinson, Asda, Comet	John Lewis, Marks & Spencer, Bhs
Bury St Edmunds	• Cornhill Walk (1988), 4,459 sqm gross	JJB Sports, Fopp, Woolworths, Argos	Marks & Spencer
Stevenage	• Queensway (1959), 12,077 sqm gross • Westgate Centre (1988), 6,967 sqm gross • Forum Shopping Park Phase 1 (1990), Phase 2 (1997), 22,296 sqm gross	Woolworths, TK Maxx, Bhs, Primark, Staples, Tesco Extra	Marks & Spencer, Bhs
Huntingdon	• St Germain Walk (1999), 11,148 sqm gross • Chequers Court (1962), 5,945 sqm gross • St Benedicts Court (1977), 6,596 sqm gross	Sainsbury's, Wilkinson, Waitrose, Woolworths, Argos	Marks & Spencer
Newmarket	• The Rookery (1972), 12,356 sqm gross	Marks & Spencer, Argos, Woolworths, TK Maxx	Palmers, Marks & Spencer
Ely	• Cloisters Shopping Centre (1997), 6,224 sqm gross	Waitrose, Wilkinson, Woolworths, Argos	None
Source: Promis/EGI/Goad/GVA Grimley			

APPENDIX 1C

KEY INDICATORS

Competing Centres: Key Indicators

2.1 Javelin Rank		
Centre	**Rank (2007)**	**Change in Rank position 2006**
Peterborough	54	↓
Cambridge	76	↑
Stevenage	113	↑
Bury St Edmunds	210	↓
Huntingdon	335	↓
Newmarket	374	↑
Ely	392	↓
Source: Venue Score/Javelin 2006		

2.2 Retail Floorspace	
Centre	***sq.m gross***
Cambridge	139,000
Peterborough	131,000
Bury St Edmunds	68,000
Stevenage	64,000
Huntingdon	42,000
Newmarket	36,000
Ely	-
Source: Promis (May 2008)	

2.3 Comparison Goods Trade Draw %	
Centre	%
Cambridge	28.9
Peterborough	6.9
Bury St Edmunds	4.8
Huntingdon	4.1
Stevenage	3.3
Ely	2.9
Newmarket	2.8
Source: GVA Grimley Modelling	

2.4 Comparison Goods Trade Draw £m	
Centre	**£m**
Cambridge	814,481,267
Peterborough	195,405,844
Bury St Edmunds	135,676,037
Huntingdon	116,993,347
Stevenage	92,622,318
Ely	81,946,589
Newmarket	79,245,571
Source: GVA Grimley Modelling	

Competing Centres: Key Indicators

2.5 Comparison of Prime Retail Yields (% Change)			
Centre	**Jan 05**	**Jan 08**	**Change in rank position**
Bury St Edmunds	5	4.75	↓
Peterborough	5	5	<>
Cambridge	5.25	5.25	<>
Newmarket	6.75	6	↓
Ely	7	6	↓
Stevenage	6.5	6.5	<>
Huntingdon	7	6.5	↓
Source: Valuation Office Agency – Property Market Report			

2.6 Comparison of Prime Retail Rents (£ per sq.m)			
Centre	**2005**	**2007**	**Change in rank position**
Cambridge	2583	2637	↑
Peterborough	2260	2260	<>
Bury St Edmunds	1130	1238	↑
Stevenage	1184	1238	↑
Newmarket	700	753	↑
Huntingdon	700	753	↑
Ely	646	646	<>
Source: Colliers In Town Retail Rents 2006			

2.7 Retailer Demand October 2007	
Centre	**No.**
Cambridge	182
Peterborough	95
Bury St Edmunds	71
Stevenage	56
Huntingdon	40
Newmarket	33
Ely	22
Source: Focus (May 2008)	

2.8 Distance from Cambridge	
Centre	**Km (Approximate)**
Cambridge	-
Newmarket	21
Ely	26
Huntingdon	29
Bury St Edmunds	43
Stevenage	45
Peterborough	63
Source: GVA Grimley	

APPENDIX 1D

PIPELINE SCHEMES

Competing Centres

Key Town Centre Pipeline Schemes

Peterborough
• Extension to Queensgate Shopping Centre known as 'North Westgate'. Planning application submitted for up to 68,000 sqm (732,000 sq ft) additional retail floorspace including 15,050 (162,000 sq ft) Marks & Spencer, 6,039 sqm (65,000 sq ft) second anchor store, 5 flagship stores and 50 unit shops. • Full planning permission has been granted for the redevelopment of the Asda towards the rear of the Riverside Centre to provide new 10,219 sqm (110,000 sq ft) store. • There are initial proposals for 10,219 sqm (110,000 sq ft) unit shops along with offices and flats at Peterborough Railway Station (Station Quarter).
Bury St Edmunds
• The 24,619 sqm (265,000 sq ft) redevelopment of the Cattle Market is currently under construction. Upon completion in February 2009, the scheme will provide a 7,897 sqm (85,000 sq ft) Debenhams department store and 35 unit shops. • There are plans for a 4,645 sqm (50,000 sq ft) retail park, 1,393 sqm (15,000 sq ft) foodstore and 465 sqm (5,000 sq ft) of unit shops at Station Hill/Tayfen Road. A planning application is yet be submitted. • There are proposals for three retail warehouse units (c.1,858 sqm / 20,000 sq ft) at the Glasswells World of Furniture on Newmarket Road. A planning application is yet to be submitted.
Ely
• An outline application has been submitted for a new DIY warehouse unit at Lisle Lane. • An application has been submitted for 1 525 sqm extension to the Tesco store at Angel Drove.
Stevenage
• The town centre is the subject of a regeneration strategy led by Stevenage Borough Council in partnership with developers Stanhope and ING Real Estate. A planning application has recently been submitted proposing 18,580 sqm (200,000 sq ft) additional retail floorspace as part of a 28,520 sqm (307,000 sq ft) redevelopment scheme for the town centre. • An application has also been submitted proposing the redevelopment of the Matalan site for unit shops with residential units although no additional retail floorspace will be created as part of the development.
Newmarket
• Full planning permission has been granted for the reconfiguration and extension to the Guiness Centre to provide a 2-stroey 557 sqm (6,000 sq ft) retail unit.
Huntingdon
• A Town Centre Vision published by the Civic Trust in September 2006 identifies the potential for new retail floorspace provision as part of an extension to Chequers Court (Phase 2) in the short term. • There is also potential for additional retailing on land north of George Street (west of St John's Street) for retail warehousing and/or a foodstore.

Source: Promis, EGi and Local Authority websites (May 2008)

APPENDIX 1E

NEIGHBOURING AUTHORITIES RETAIL STUDIES

Previous Retail Studies

HUNTINGDONSHIRE RETAIL ASSESSMENT STUDY (SEPTEMBER 2005)

1.1 Roger Tym and Partner's 2005 study identified Huntingdon as a relatively healthy town centre with increasing rents and declining vacancy levels. The study also comments on poor clothing offer and limited range of mid/high-order operators and considers the centre is failing to fulfil its maximum potential as the District's principle centre. The study recommended supporting new, larger units in the centre to better meet multiple-operator demand. Other town centres in the district including St Neots and St Ives, which were found to be vital and viable and the local centres of Yaxley and Sawtry were considered healthy and adequately meeting the day-to-day convenience needs of the local population. Ramsey was considered the least healthy of all the district's centres and would benefit from an improved range of retail and service outlets to better reflect its town centre status.

1.2 As part of the study, a full household survey of comparison, convenience and leisure spending in the District was undertaken. The quantitative analysis identified capacity for between 17,000 and 21,000 sqm net additional comparison sales floorspace up to 2021. The study highlighted an acceptable 76% retention rate in the convenience sector but also identified capacity for some additional provision and recommended the introduction of a discount foodstore in Huntingdon and enhanced convenience provision in Ramsey.

1.3 The report acknowledges potential development opportunities in the district and emphasises Huntingdon as the key focus for new development. Opportunities for the centre include the Phase 2 redevelopment of Chequer's Court which would absorb the majority of the comparison goods capacity identified in the period 2004-2009. The study considers the potential for edge-of-centre retail development post-2009 at the Ermine Street/ George Street Area to the north west of Huntingdon town centre, but recommends no further retail provision until the Chequers Court Phase 2 is committed to avoid any detrimental impact of the viability of the scheme.

FENLAND DISTRICT RETAIL STUDY (SEPTEMBER 2005)

1.4 The Fenland District retail study was undertaken by Roger Tym and Partner's in 2005. The study analyses the performance of the district's main centres (Wisbech, March, Whittlesey and Chatteris) against each of the healthcheck indicators outlined in PPS6. Wisbech is the largest centre in the district which was found to be generally vital and viable but with some scope for improvement with particular regard to low representation in the fashion sector. All other centres were considered healthy and to be performing relatively well in their individual roles.

1.5 Quantitative analysis of the centres identified scope for an additional 18,800 sqm net comparison goods floorspace for the district. In the convenience sector, the study indicates capacity for additional 3,700 sqm to 2021 in superstore format or 6,800 sqm if brought forward in smaller supermarket format. The study also identified scope for additional leisure and service provision to complement retail provision in the district. The study recommends a pro-active approach to planning for new development in March town centre and endorses proposals to redevelop the Stadium site in Wisbech which will bring forward a beneficial quantum of comparison retail floorspace to the centre.

East Cambridgeshire Retail Study (September 2005)

1.6 The 2005 study undertaken by Roger Tym and Partner's considered Ely, the largest centre in the district, a thriving market town to score well against a range of healthcheck indicators. Whilst other town centres in the district, Soham and Littleport were found to be performing less well. Quantitative analysis identified additional capacity for both comparison and convenience goods floorspace in the periods between 2004 and 2021. The study recommends focussing all identified capacity for comparison goods to Ely; and 50% of the convenience goods capacity to Ely with the remaining 50% directed to Soham and Littleport. There are limited development sites in Ely although the Urban Capacity Study (2004) identifies a number of sites beyond the town centre boundary which could accommodate future retail growth. The study supports that additional comparison and convenience retail floorspace should be located in the town centres first, followed by edge-of-centre and then out of centre sites sequentially.