
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 2008

% 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 2008
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	132,419	128,538	80,676	63,483	56,562	30,986	63,410	6,318	14,392	6,913	9,558	26,759	30,764	14,991	57,113	8,857	31,864	27,440	3,669	19,651	814,364
2	Peterborough	2,773	486	1,567	848	0	0	6,649	2,763	0	0	290	0	231	0	1,029	0	69,215	71,264	38,399	0	195,513
3	Bury St Edmunds	1,864	0	1,005	580	146	650	3,960	21,709	54,670	14,961	257	15,593	8,615	3,756	444	0	0	0	0	0	128,210
4	Ely	1,807	1,015	4,954	590	0	0	67,896	2,385	297	0	0	566	0	0	0	0	0	990	1,440	0	81,940
5	Stevenage	0	0	0	431	809	0	0	197	0	269	519	0	379	0	18,517	26,390	0	0	0	45,112	92,622
6	Newmarket	2,591	1,908	7,355	0	169	4,766	6,581	978	7,501	0	0	45,582	342	0	0	0	0	0	0	464	78,237
7	Bedford	0	0	1,476	686	0	0	439	1,325	0	0	0	0	0	0	0	35,190	13,810	0	0	585	53,511
8	Huntingdon	0	0	2,371	1,073	0	108	292	0	0	216	0	0	475	0	0	0	74,430	34,356	3,209	463	116,993
9	Bishop Stortford	0	0	0	0	0	0	0	0	0	0	27,294	0	0	6,826	0	649	0	0	0	21,397	56,166
10	King's Lynn	0	0	475	0	0	0	4,573	35,916	0	0	0	0	0	0	0	0	0	0	2,778	0	43,742
11	Colchester	0	0	0	0	0	0	0	0	557	28,792	3,541	0	862	12,426	0	0	0	0	0	0	46,178
12	St Neots	0	385	0	552	0	0	0	0	0	0	0	0	0	0	0	5,111	51,041	397	85	0	57,571
13	Sudbury	0	0	0	0	0	0	0	0	1,577	23,142	257	0	231	23,393	1,269	706	0	0	0	2,817	53,393
14	St Ives	602	690	668	3,672	63	0	1,244	0	144	0	0	0	0	0	0	1,263	4,860	25,178	787	159	39,330
15	Chelmsford	0	0	0	0	381	0	0	0	0	4,479	17,125	0	231	727	0	0	0	0	0	0	22,943
16	Milton Keynes	1,386	385	229	175	209	0	380	0	0	0	0	271	0	350	0	7,461	1,532	0	287	3,243	15,909
17	Norwich	602	1,705	0	175	537	223	2,867	6,743	730	448	0	848	0	0	0	0	0	0	0	585	15,463
	SUB-TOTAL	144,044	135,112	100,778	72,264	58,876	36,733	158,292	78,333	79,868	79,221	58,842	89,619	42,130	62,469	78,372	85,628	246,751	159,624	50,654	94,475	1,912,084
	Other	67,301	50,762	27,172	25,460	22,469	19,140	38,433	40,447	24,491	41,419	71,165	18,672	46,355	31,836	46,810	72,314	45,437	29,804	59,310	129,295	908,091
	TOTAL	211,344	185,873	127,951	97,724	81,345	55,872	196,725	118,780	104,359	120,639	130,007	108,290	88,485	94,305	125,181	157,942	292,188	189,428	109,965	223,770	2,820,175

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	4.5
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	814,364
Peterborough	195,513
Bury St Edmunds	128,210
Huntingdon	116,993
Stevenage	92,622
Ely	81,940
Newmarket	78,237

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 5

CAPACITY PROJECTIONS: CONVENIENCE GOODS

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

TABLE 1
SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2008	2011	2016	2021
1	CB3 0, CB4 0/1/2/3/6/9, CB5 8	73,769	79,302	85,011	87,477
2	CB1 1/2/3/7/8/9, CB2 1/2/3, CB3 9	70,291	77,531	89,083	88,192
3	CB4 5/8, CB5 9/0	37,771	41,624	53,278	58,766
4	CB3 6/7/8	26,822	29,826	29,408	28,556
5	CB2 4/5/6	24,027	24,051	24,267	23,928
6	CB1 5/6	16,604	16,670	16,070	21,357
7	CB6 1/2/3, CB7 4/5	62,389	65,134	66,176	65,779
8	IP26 4, IP27 0/9, PE38 0/9	40,261	41,458	43,359	45,368
9	IP28 6/7/8, IP29 4/5	33,619	34,668	36,277	37,840
10	CO10 7/8, CO9 3/4/1/2	37,342	38,193	39,470	40,734
11	CM22 6, CM23 1, CM24 1/8, CM6 2/3, CM7 4/5	39,137	40,299	41,923	43,305
12	CB8 0/7/8/9	34,547	35,929	38,010	39,866
13	CB9 0/7/8/9	29,387	30,482	32,124	33,800
14	CO10 1/2, CB11 3/4	29,889	30,664	31,942	33,089
15	SG8 8/9/0/5/6/7	39,068	40,243	41,969	43,796
16	SG18 0/8/9, SG19 1/2/3	49,826	51,282	53,830	56,229
17	PE19 1/2/5/6/7/8, PE28 0/4/9, PE29 1/2/3/6/7	93,302	97,221	98,290	100,452
18	PE26 1/2, PE27 3/4/5/6, PE28 2/3/5	58,193	58,135	56,274	55,374
19	PE15 0/8/9, PE16 6	38,096	38,286	39,741	43,755
20	SG11 2, SG5 4, SG6 1/2/3/4, SG7 5/6, SG9 0/9, SG11 1	71,343	72,444	74,167	76,247
TOTAL		905,683	943,442	990,672	1,023,911

SOURCE: Experian Business Strategies March 2008
Cambridgeshire County Council Mid 2006 population estimates by ward transposed into zones and growth rates used in **BOLD**

TABLE 1A
POPULATION GROWTH RATES

2008-2011 (%)	2011-2016 (%)	2016-2021 (%)	2008-2021 (%)
7.5	7.2	2.9	18.6
10.3	14.9	-1.0	25.5
10.2	28.0	10.3	55.6
11.2	-1.4	-2.9	6.5
0.1	0.9	-1.4	-0.4
0.4	-3.6	32.9	28.6
4.4	1.6	-0.6	5.4
3.0	4.6	4.6	12.7
3.1	4.6	4.3	12.6
2.3	3.3	3.2	9.1
3.0	4.0	3.3	10.6
4.0	5.8	4.9	15.4
3.7	5.4	5.2	15.0
2.6	4.2	3.6	10.7
3.0	4.3	4.4	12.1
2.9	5.0	4.5	12.9
4.2	1.1	2.2	7.7
-0.1	-3.2	-1.6	-4.8
0.5	3.8	10.1	14.9
1.5	2.4	2.8	6.9
4.2	5.0	3.4	13.1

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

TABLE 2
CONVENIENCE GOODS EXPENDITURE FORECASTS PER CAPITA (2006 prices)

GROWTH IN CONVENIENCE GOODS PER CAPITA RETAIL EXPENDITURE:										
0.70 %pa 2006-2021										
ZONE	2006	2006 Minus SFT at 2%	2008	2008 Minus SFT at 2.66%	2011	2011 Minus SFT at 3.33%	2016	2016 Minus SFT at 4%	2021	2021 Minus SFT at 4%
1	1,624	1,592	1,647	1,603	1,682	1,626	1,741	1,672	1,803	1,731
2	1,474	1,445	1,495	1,455	1,526	1,475	1,580	1,517	1,637	1,571
3	1,804	1,768	1,829	1,781	1,868	1,806	1,934	1,857	2,003	1,923
4	1,885	1,847	1,911	1,861	1,952	1,887	2,021	1,940	2,093	2,009
5	1,829	1,792	1,855	1,805	1,894	1,831	1,961	1,883	2,031	1,950
6	1,821	1,785	1,847	1,797	1,886	1,823	1,953	1,874	2,022	1,941
7	1,724	1,690	1,748	1,702	1,785	1,726	1,849	1,775	1,914	1,838
8	1,672	1,639	1,695	1,650	1,731	1,674	1,793	1,721	1,856	1,782
9	1,714	1,680	1,738	1,692	1,775	1,716	1,838	1,764	1,903	1,827
10	1,806	1,770	1,831	1,783	1,870	1,808	1,936	1,859	2,005	1,925
11	1,826	1,789	1,852	1,802	1,891	1,828	1,958	1,880	2,027	1,946
12	1,735	1,700	1,759	1,713	1,797	1,737	1,860	1,786	1,926	1,849
13	1,702	1,668	1,726	1,680	1,762	1,704	1,825	1,752	1,890	1,814
14	1,770	1,735	1,795	1,747	1,833	1,772	1,898	1,822	1,965	1,887
15	1,728	1,693	1,752	1,706	1,789	1,730	1,853	1,779	1,919	1,842
16	1,710	1,676	1,734	1,688	1,771	1,712	1,834	1,760	1,899	1,823
17	1,719	1,685	1,743	1,697	1,780	1,721	1,843	1,769	1,909	1,832
18	1,743	1,708	1,767	1,720	1,805	1,745	1,869	1,794	1,935	1,858
19	1,636	1,603	1,659	1,615	1,694	1,638	1,754	1,684	1,816	1,744
20	1,755	1,720	1,780	1,732	1,817	1,757	1,882	1,807	1,949	1,871

Source: Experian Business Strategies March 2008

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

TABLE 3

SURVEY AREA RETAIL EXPENDITURE FORECASTS (2006 prices)

ZONE	CONVENIENCE GOODS			
	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	118,252	128,916	142,111	151,423
2	102,270	114,396	135,163	138,561
3	67,258	75,165	98,936	112,999
4	49,906	56,279	57,062	57,374
5	43,377	44,034	45,688	46,648
6	29,845	30,388	30,123	41,455
7	106,168	112,405	117,437	120,876
8	66,446	69,388	74,625	80,854
9	56,878	59,481	64,004	69,131
10	66,568	69,046	73,375	78,413
11	70,541	73,660	78,799	84,285
12	59,164	62,400	67,883	73,725
13	49,370	51,933	56,280	61,318
14	52,220	54,330	58,197	62,427
15	66,637	69,610	74,651	80,666
16	84,101	87,781	94,752	102,487
17	158,313	167,291	173,921	184,056
18	100,119	101,431	100,966	102,877
19	61,520	62,700	66,926	76,300
20	123,589	127,268	133,984	142,631
TOTAL	1,532,544	1,617,903	1,744,884	1,868,506

SOURCE: Table 1, Experian Business Strategies March 2008

CAMBRIDGE CITY COUNCIL: CAMBRIDGE CITY CENTRE

TABLE 4
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	SAINSBURY'S, SIDNEY STREET				MARKS AND SPENCER, SIDNEY ST				MARKS AND SPENCER, GRAFTON				CAMBRIDGE LOCAL STORES				TOTAL			
	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2008 (%)	2011 (%)	2016 (%)	2021 (%)
1	6	6	6	6	2	2	2	2	0	0	0	0	2	2	2	2	10	10	10	10
2	4	4	4	4	2	2	2	2	2	2	2	2	5	5	5	5	13	13	13	13
3	1	1	1	1	1	1	1	1	0	0	0	0	2	2	2	2	4	4	4	4
4	0	0	0	0	1	1	1	1	0	0	0	0	2	2	2	2	3	3	3	3
5	2	2	2	2	0	0	0	0	0	0	0	0	2	2	2	2	2	2	2	2
6	2	2	2	2	0	0	0	0	0	0	0	0	0	0	0	0	2	2	2	2
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1
15	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
18	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: Household Survey, March 2008

TABLE 5
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	SAINSBURY'S, SIDNEY STREET				MARKS AND SPENCER, SIDNEY ST				MARKS AND SPENCER, GRAFTON				CAMBRIDGE LOCAL STORES				TOTAL			
	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	7,302	7,961	8,775	9,350	1,981	2,159	2,380	2,536	955	987	426	454	2,513	2,739	3,020	3,218	12,150	13,246	14,602	15,556
2	4,525	5,062	5,981	6,131	2,148	2,402	2,638	2,910	1,969	2,202	2,602	2,667	4,632	5,405	6,385	6,547	13,474	15,072	17,608	18,255
3	796	789	1,039	1,184	706	789	1,039	1,184	0	0	0	0	1,110	1,240	1,632	1,864	2,522	2,819	3,710	4,233
4	0	0	0	0	674	760	770	775	0	0	0	0	836	943	956	961	1,510	1,702	1,726	1,736
5	1,171	1,189	1,234	1,259	0	0	0	0	0	0	0	0	1,009	1,024	1,062	1,085	2,180	2,213	2,298	2,344
6	545	555	550	727	0	0	0	0	97	99	98	126	0	0	0	0	642	653	648	921
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	160	169	183	199	160	169	183	199
14	0	0	0	0	0	0	0	0	0	0	0	0	313	326	349	375	313	326	349	375
15	0	0	0	0	0	0	0	0	0	0	0	0	400	418	446	484	400	418	448	484
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
18	826	837	853	849	0	0	0	0	0	0	0	0	300	304	303	309	1,126	1,141	1,136	1,151
19	0	0	0	0	0	0	0	0	0	0	0	0	185	188	201	222	185	188	201	222
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	15,076	16,392	18,411	19,633	5,508	6,111	7,028	7,407	2,420	2,688	3,126	3,236	11,658	12,756	14,540	15,270	34,662	37,947	43,106	45,467

SOURCE: Tables 3 & 4

CAMBRIDGE CITY COUNCIL: OUT-OF-CENTRE

TABLE 8
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	TESCO, CHEDDARS LANE				ASDA, BEEHIVE CENTRE				SAINSBURY'S, COLDHAMS LANE				WAITROSE, TRUMPINGTON				TOTAL			
	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
1	9	9	9	9	2	2	2	2	9	9	9	9	3	3	3	3	24	24	24	24
2	6	6	6	6	4	4	4	4	21	21	21	21	14	14	14	14	46	46	46	46
3	5	5	5	5	1	1	1	1	7	7	7	7	0	0	0	0	13	13	13	13
4	1	1	1	1	2	2	2	2	2	2	2	2	8	8	8	8	12	12	12	12
5	2	2	2	2	1	1	1	1	5	5	5	5	24	24	24	24	31	31	31	31
6	3	3	3	3	1	1	1	1	6	6	6	6	1	1	1	1	11	11	11	11
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
9	1	1	1	1	1	1	1	1	0	0	0	0	0	0	0	0	2	2	2	2
10	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	2	2	2	2	2	2	2	2	0	0	0	0	2	2	2	2	5	5	5	5
13	1	1	1	1	3	3	3	3	1	1	1	1	1	1	1	1	6	6	6	6
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	7	7	7	7	7	7	7	7
16	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	1	1	1	1
17	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1
18	0	0	0	0	2	2	2	2	0	0	0	0	0	0	0	0	2	2	2	2
19	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1	2	2	2	2
20	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1

SOURCE: Household Survey, March 2008

TABLE 9
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	TESCO, CHEDDARS LANE				ASDA, BEEHIVE CENTRE				SAINSBURY'S, COLDHAMS LANE				WAITROSE, TRUMPINGTON				TOTAL			
	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
1	10,938	11,525	13,145	14,007	2,572	2,804	3,091	3,283	10,584	11,538	12,719	13,552	3,961	4,351	4,796	5,111	28,065	30,618	33,751	35,963
2	6,596	7,379	8,718	8,997	4,040	4,519	5,239	5,473	21,522	24,052	28,418	29,132	14,599	16,330	19,295	19,796	46,737	52,279	61,770	63,322
3	3,027	3,382	4,452	5,085	766	789	1,039	1,186	4,943	5,026	7,272	8,302	202	225	297	338	8,819	9,922	13,059	14,916
4	374	422	428	430	749	844	856	861	898	1,013	1,027	1,030	4,117	4,643	4,708	4,733	6,138	6,922	7,019	7,057
5	813	826	857	875	398	363	377	385	1,985	2,015	2,050	2,134	10,237	10,392	10,782	11,009	13,393	13,595	14,108	14,402
6	1,015	1,023	1,024	1,426	224	228	226	313	1,879	1,907	1,980	2,601	224	228	226	311	3,326	3,366	3,366	4,623
7	292	309	323	332	0	0	0	0	0	0	0	0	0	0	0	0	292	309	323	332
8	498	520	560	606	0	0	0	0	0	0	0	0	0	0	0	0	498	520	560	606
9	427	448	480	518	427	448	480	518	0	0	0	0	0	0	0	0	853	896	960	1,037
10	0	0	0	0	0	0	0	0	0	0	0	0	499	518	550	588	499	518	550	588
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	887	936	1,018	1,104	887	936	1,018	1,104	0	0	0	0	887	936	1,018	1,104	2,692	2,808	3,055	3,318
13	370	389	422	460	1,679	1,766	1,914	2,085	370	389	422	460	370	389	422	460	2,789	2,934	3,180	3,464
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	4,948	5,169	5,543	5,989	4,948	5,169	5,543	5,989
16	0	0	0	0	631	658	711	759	0	0	0	0	0	0	0	0	631	658	711	759
17	475	502	522	552	0	0	0	0	0	0	0	0	1,662	1,767	1,826	1,833	2,137	2,258	2,348	2,485
18	0	0	0	0	1,577	1,598	1,590	1,620	0	0	0	0	0	0	0	0	1,577	1,598	1,590	1,620
19	0	0	0	0	461	470	502	572	0	0	0	0	461	470	502	572	461	470	502	572
20	1,359	1,400	1,474	1,569	0	0	0	0	0	0	0	0	0	0	0	0	1,359	1,400	1,474	1,569
TOTALS	27,073	29,470	33,423	35,887	14,310	15,421	17,142	18,180	42,155	46,438	53,839	57,218	42,198	45,408	49,865	51,930	125,736	136,737	154,369	163,216

SOURCE: Tables 3 & 6

SOUTH CAMBRIDGESHIRE: MAJOR RURAL CENTRE STORES

TABLE 10
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	MORRISONS, CAMBOURNE				BUDGENS, SAWSTON				SPAR, SAWSTON				TESCO EXPRESS, HISTON				CO-OP, GREAT SHELFORD				CO-OP, FULBOURN				TOTAL			
	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	1	1	1	1	0	0	0	0	0	0	0	0	2	2	2	2	0	0	0	0	0	0	0	0	2	2	2	2
2	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	2	2	2	2
3	3	3	3	3	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	4	4	4	4
4	18	18	18	18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	18	18	18	18
5	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	3	3	3	3	0	0	0	0	10	10	10	10
6	1	1	1	1	0	0	0	0	0	0	0	0	2	2	2	2	0	0	0	0	6	6	6	6	9	9	9	9
7	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	1	0	1	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	1	2	1	2
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	0	0	0
17	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3	0	0	0
18	2	1	0	1	1	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	4	2	1	1
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1

SOURCE: Household Survey, March 2008

TABLE 11
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	MORRISONS, CAMBOURNE				BUDGENS, SAWSTON				SPAR, SAWSTON				TESCO EXPRESS, HISTON				CO-OP, GREAT SHELFORD				CO-OP, FULBOURN				TOTAL			
	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	887	867	1,066	1,136	0	0	0	0	0	0	0	0	1,881	2,159	2,360	2,536	0	0	0	0	0	0	0	2,868	3,126	3,446	3,673	
2	0	0	0	0	1,074	1,201	1,419	1,455	0	0	0	0	895	1,001	1,163	1,212	0	0	0	0	0	0	0	1,969	2,252	2,602	2,687	
3	2,068	2,311	3,362	3,475	0	0	0	0	0	0	0	0	504	564	742	841	0	0	0	0	0	0	0	2,572	2,876	3,794	4,325	
4	9,021	10,172	10,314	10,370	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	9,021	10,172	10,314	10,370	
5	130	132	137	140	2,722	2,763	2,867	2,927	0	0	0	0	358	363	377	385	1,160	1,178	1,222	1,248	0	0	0	4,270	4,436	4,603	4,700	
6	321	327	324	446	0	0	0	0	0	0	0	0	448	456	452	422	0	0	0	0	1,849	1,876	1,860	2,560	2,611	2,550	2,636	
7	756	843	881	907	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	756	843	881	907	
8	199	208	224	243	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	199	208	224	243	
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	529	552	591	632	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	282	295	315	337	811	847	906	968
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	160	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	160	0	0	0	0
14	0	0	0	0	0	543	0	468	0	0	0	0	392	407	436	468	0	0	0	0	0	0	0	392	951	436	938	
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	1,262	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	273	285	308	333	0	0	0	1,335	282	308	333	
17	5,343	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	5,343	0	0	0	0
18	2,403	1,116	0	849	826	0	0	0	601	609	606	617	0	0	0	0	0	0	0	0	0	0	0	3,830	1,724	606	1,466	
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1,359	1,400	1,474	1,568	0	0	0	1,359	1,400	1,474	1,568	
TOTALS	23,119	16,429	16,579	16,196	4,622	4,508	4,286	4,850	601	609	606	617	4,977	4,951	5,570	6,071	2,793	2,863	3,004	3,150	2,125	2,171	2,176	2,897	37,837	31,730	32,220	35,782

SOURCE: Tables 3 & 10

SOUTH CAMBRIDGESHIRE: OUT-OF-CENTRE

TABLE 12
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	TESCO, BAR HILL				TESCO, MILTON				TESCO, YARROW ROAD				TOTAL			
	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2008 (%)	2011 (%)	2016 (%)	2021 (%)
1	13	13	13	13	29	29	29	29	0	0	0	0	41	41	41	41
2	2	2	2	2	2	2	2	2	14	14	14	14	17	17	17	17
3	13	13	13	13	17	17	17	17	5	5	5	5	35	35	35	35
4	45	45	45	45	2	2	2	2	0	0	0	0	47	47	47	47
5	0	0	0	0	1	1	1	1	15	15	15	15	16	16	16	16
6	0	0	0	0	1	1	1	1	28	28	28	28	29	29	29	29
7	1	1	1	1	1	1	1	1	0	0	0	0	2	2	2	2
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	2	2	2	2	2	2	2	2
12	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1
13	0	0	0	0	1	1	1	1	1	1	1	1	2	2	2	2
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	2	2	2	2	0	0	0	0	0	0	0	0	2	2	2	2
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	1	1	1	1	0	0	0	0	0	0	0	0	1	1	1	1
18	4	4	4	4	0	0	0	0	0	0	0	0	4	4	4	4
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: Household Survey, March 2008

TABLE 13
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	TESCO, BAR HILL				TESCO, MILTON				TESCO, YARROW ROAD				TOTAL			
	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	14,841	16,179	17,835	19,004	33,968	37,031	40,822	43,486	148	161	178	189	48,957	53,371	58,834	62,689
2	1,534	1,716	2,027	2,078	1,841	2,059	2,433	2,494	14,088	15,758	18,619	19,687	17,463	19,533	23,079	23,659
3	9,029	10,281	13,082	15,170	11,190	12,515	16,473	18,814	3,430	3,833	5,046	5,763	23,858	26,438	34,801	39,167
4	22,533	25,410	25,764	25,984	888	1,013	1,027	1,033	0	0	0	0	23,431	26,423	26,791	26,937
5	0	0	0	0	358	363	377	385	6,614	6,714	6,965	7,113	6,972	7,077	7,343	7,497
6	0	0	0	0	254	228	226	211	8,399	8,552	8,477	11,666	8,523	8,780	8,703	11,977
7	795	843	881	907	795	843	881	907	0	0	0	0	1,593	1,686	1,762	1,810
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	1,234	1,289	1,379	1,475	1,234	1,289	1,379	1,475
12	0	0	0	0	192	203	221	240	624	658	716	778	816	861	937	1,017
13	160	169	183	199	370	389	422	460	370	389	422	460	901	948	1,027	1,119
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	1,000	1,044	1,120	1,210	200	209	224	242	0	0	0	0	1,199	1,253	1,344	1,452
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	1,187	1,255	1,304	1,380	0	0	0	0	0	0	0	0	1,187	1,255	1,304	1,380
18	4,055	4,108	4,089	4,167	0	0	0	0	0	0	0	0	4,055	4,108	4,089	4,167
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	55,135	60,814	66,485	70,019	50,046	54,854	63,105	68,381	34,908	37,355	41,803	46,531	140,089	153,023	171,293	184,931

SOURCE: Tables 3 & 12

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

**TABLE 14
CAMBRIDGE CITY**

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sqm net)	Total Potential Turnover (£000s)
CAMBRIDGE CITY CENTRE					
Sainsbury's, Sidney Street	1,326	95%	1,260	9,744	12,275
Marks & Spencer, Sidney Street	1,171	95%	1,112	11,800	13,127
Marks and Spencer, Grafton Centre	773	95%	734	11,800	8,665
Cambridge Local Stores	1,048	95%	996	2,500	2,489
SUB TOTAL			4,102	8,912	36,556
DISTRICT AND LOCAL CENTRE STORES					
Tesco Express, Cherry Hinton	245	100%	245	12,894	3,159
Tesco Express, Campkin Road	191	100%	191	12,894	2,463
Aldi, Histon Road	697	95%	662	3,638	2,409
Iceland, Histon Road	425	95%	404	5,715	2,307
Co-Op, Hills Road	217	95%	206	6,722	1,386
Co-Op, Histon Road	359	95%	341	6,722	2,293
Budgens, Adkins Corner/Perne Road	514	95%	488	3,342	1,632
Budgens, Arbury Road	789	95%	750	3,342	2,505
Co-Op, Milton Road	139	95%	132	6,722	888
Co-Op, Mill Road	514	95%	488	6,722	3,282
SUB TOTAL			3,907	5,713	22,323
OUT OF CENTRE					
Tesco, Cheddars Lane			2,673	12,894	34,466
Asda, Beehive Centre	3,716	70%	2,601	14,352	37,332
Sainsburys, Coldham Lane	4,265	70%	2,986	9,744	29,091
Waitrose, Trumpington	2,976	90%	2,678	11,601	31,072
SUB TOTAL			10,938	12,064	131,961
TOTAL CAMBRIDGE CITY			18,947	10,072	190,840

Source: Cambridge City Council/IGD

**TABLE 15
SOUTH CAMBRIDGESHIRE**

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sqm net)	Total Potential Turnover (£000s)
MAJOR RURAL CENTRE STORES					
Morrisons, Cambourne	2,992	90%	2,693	11,173	30,087
Budgens, Sawston	690	95%	656	3,342	2,191
Spar, Sawston	376	95%	357	5,251	1,876
Tesco Express, Histon	220	95%	209	12,894	2,695
Co-Op, Great Shelford	155	95%	147	6,722	990
Co-Op, Fulbourne	323	95%	307	6,722	2,063
SUB TOTAL			4,369	9,133	39,900
OUT OF CENTRE					
Tesco, Bar Hill			4,031	12,894	51,976
Tesco, Milton			2,244	12,894	28,934
Tesco, Yarrow Road			2,458	12,894	31,693
SUB TOTAL			8,733	12,894	112,603
TOTAL SOUTH CAMBRIDGESHIRE			13,102	11,640	152,504

Source: South Cambridgeshire District Council/IGD

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sqm net)	Total Potential Turnover (£000s)
TOTAL CAMBRIDGE SUB REGION			32,049	10,713	343,343

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

TABLE 16
RETAIL CONVENIENCE COMMITMENTS

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience (sqm)	Company Average Sales (£ per sq m net)	Average Turnover 2008 (£000s)	Average Turnover 2011 (£000s)	Average Turnover 2016 (£000s)	Average Turnover 2021 (£000s)
Cambridge City Council								
Land to the north of Unit 3, 11 High Street, Cherry Hinton, Cambridge (Ref: C/00071/07)	35	95%	33	2,500	83	85	89	92
186-188 High Street, East Chesterton, Cambridge (Ref: C/00987/06)	24	95%	23	2,500	57	58	61	63
TOTAL	59		56		140	144	149	155
South Cambridgeshire District Council								
Land at Arbury Camp, King's Hedges Road, Impington, Cambridge (Ref: S/02379/01)	1,858	95%	1,765	2,500	4,413	4,520	4,703	4,894
Land at 23 Church Street, Willingham, Cambridge (Ref: S/00898/06)	63	95%	60	2,500	150	153	159	166
TOTAL	1,921		1,825		4,562	4,673	4,863	5,060

Source: Cambridge City Council, South Cambridgeshire District Council and Cambridgeshire County Council

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

**TABLE 17
RETAIL PIPELINE - CONVENIENCE GOODS**

	Net Flsp (sqm)	Co Average Sales (£ per sqm net)	Total Turnover 2008 (£000s)	Total Turnover 2011 (£000s)	Total Turnover 2016 (£000s)	Total Turnover 2021 (£000s)
South Cambridgeshire						
Cambourne supermarket	1,063	5,000	5,315	5,444	5,665	5,895
Cambourne unit shops	440	2,500	1,100	1,127	1,172	1,220
Northstowe	5,525	10,000	55,250	56,587	58,887	61,280
Cambridge City						
East Cambridge	3,000	10,000	30,000	30,726	31,975	33,274
Station Area	507	10,000	5,070	5,193	5,404	5,623
Southern Fringe	682	10,000	6,820	6,985	7,269	7,564
Land between Huntingdon Road and Histon Road (NIAB Site)	1140	5,000	5,700	5,838	6,075	6,322
TOTAL	11,217		109,255	111,898	116,446	121,179

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

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 18
FUTURE SHOP GLOBAL FLOORSPACE CAPACITY FOR CAMBRIDGE CITY COUNCIL

	CONVENIENCE GOODS			
	2008	2011	2016	2021
Total Convenience Goods Turnover in Cambridge City Council (£000)	201,244	219,109	247,396	261,743
Existing Shop Floorspace (sqm net)	18,947	18,947	18,947	18,947
Sales per sqm net £	10,621	10,072	10,072	10,072
Sales from Existing Floorspace (£000)	201,244	190,840	190,840	190,840
Sales from Committed Floorspace (£000)	0	144	149	155
Residual Spending to Support new shops (£000)	0	28,126	56,406	70,748
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	2,813	5,641	7,075

Cambridge City Council and South Cambridgeshire District Council
Cambridge Sub Region Retail Study 2008
CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 19
FUTURE SHOP GLOBAL FLOORSPACE CAPACITY FOR SOUTH CAMBRIDGESHIRE DISTRICT COUNCIL

	CONVENIENCE GOODS			
	2008	2011	2016	2021
Total Convenience Goods Turnover in South Cambridgeshire District (£000)	177,926	184,753	203,613	220,713
Existing Shop Floorspace (sqm net)	13,102	13,102	13,102	13,102
Sales per sqm net £	13,580	11,640	11,640	11,640
Sales from Existing Floorspace (£000)	177,926	152,504	152,504	152,504
Sales from Committed Floorspace (£000)	0	4,673	4,863	5,060
Residual Spending to Support new shops (£000)	0	27,577	46,247	63,149
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	2,758	4,625	6,315

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

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 20

FUTURE SHOP GLOBAL FLOORSPACE CAPACITY FOR CAMBRIDGE SUB REGION

	CONVENIENCE GOODS			
	2008	2011	2016	2021
Total Convenience Goods Turnover in Cambridge Sub Region (£000)	379,170	403,862	451,009	482,456
Existing Shop Floorspace (sqm net)	32,049	32,049	32,049	32,049
Sales per sqm net £	11,831	10,713	10,713	10,713
Sales from Existing Floorspace (£000)	379,170	343,343	343,343	343,343
Sales from Committed Floorspace (£000)	0	4,816	5,012	5,216
Residual Spending to Support new shops (£000)	0	55,703	102,653	133,897
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	5,570	10,265	13,390

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

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 21

FUTURE SHOP GLOBAL FLOORSPACE CAPACITY FOR CAMBRIDGE SUB REGION WITH PIPELINE

	CONVENIENCE GOODS			
	2008	2011	2016	2021
Total Convenience Goods Turnover in Cambridge Sub Region (£000)	379,170	403,862	451,009	482,456
Existing Shop Floorspace (sqm net)	32,049	32,049	32,049	32,049
Sales per sqm net £	11,831	10,713	10,713	10,713
Sales from Existing Floorspace (£000)	379,170	343,343	343,343	343,343
Sales from Committed Floorspace (£000)	0	11,386	65,222	126,395
Residual Spending to Support new shops (£000)	0	49,133	42,443	12,717
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	4,913	4,244	1,272

APPENDIX 6

CAPACITY PROJECTIONS: COMPARISON GOODS

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

**TABLE 1
SURVEY AREA POPULATION FORECASTS**

Catchment Zone	Postcode Sector Groupings	2008	2011	2016	2021
1	CB3 0, CB4 0/1/2/3/6/9, CB5 8	73,769	79,302	85,011	87,477
2	CB1 1/2/3/7/8/9, CB2 1/2/3, CB3 9	70,291	77,531	89,083	88,192
3	CB4 5/8, CB5 9/0	37,771	41,624	53,278	58,766
4	CB3 6/7/8	26,822	29,826	29,408	28,556
5	CB2 4/5/6	24,027	24,051	24,267	23,928
6	CB1 5/6	16,604	16,670	16,070	21,357
7	CB6 1/2/3, CB7 4/5	62,389	65,134	66,176	65,779
8	IP26 4, IP27 0/9, PE38 0/9	40,261	41,458	43,359	45,368
9	IP28 6/7/8, IP29 4/5	33,619	34,668	36,277	37,840
10	CO10 7/8, CO9 3/4/1/2	37,342	38,193	39,470	40,734
11	CM22 6, CM23 1, CM24 1/8, CM6 2/3, CM7 4/5	39,137	40,299	41,923	43,305
12	CB8 0/7/8/9	34,547	35,929	38,010	39,866
13	CB9 0/7/8/9	29,387	30,482	32,124	33,800
14	CO10 1/2, CB11 3/4	29,889	30,664	31,942	33,089
15	SG8 8/9/0/5/6/7	39,068	40,243	41,969	43,796
16	SG18 0/8/9, SG19 1/2/3	49,826	51,282	53,830	56,229
17	PE19 1/2/5/6/7/8, PE28 0/4/9, PE29 1/2/3/6/7	93,302	97,221	98,290	100,452
18	PE26 1/2, PE27 3/4/5/6, PE28 2/3/5	58,193	58,135	56,274	55,374
19	PE15 0/8/9, PE16 6	38,096	38,286	39,741	43,755
20	SG11 2, SG5 4, SG6 1/2/3/4, SG7 5/6, SG9 0/9, SG11 1	71,343	72,444	74,167	76,247
TOTAL		905,683	943,442	990,672	1,023,911

SOURCE: Experian Business Strategies March 2008
Cambridgeshire County Council Mid 2006 population estimates by ward transposed into zones and growth rates used in **BOLD**

**TABLE 1A
POPULATION GROWTH RATES**

2008-2011 (%)	2011-2016 (%)	2016-2021 (%)	2008-2021 (%)
7.5	7.2	2.9	18.6
10.3	14.9	-1.0	25.5
10.2	28.0	10.3	55.6
11.2	-1.4	-2.9	6.5
0.1	0.9	-1.4	-0.4
0.4	-3.6	32.9	28.6
4.4	1.6	-0.6	5.4
3.0	4.6	4.6	12.7
3.1	4.6	4.3	12.6
2.3	3.3	3.2	9.1
3.0	4.0	3.3	10.6
4.0	5.8	4.9	15.4
3.7	5.4	5.2	15.0
2.6	4.2	3.6	10.7
3.0	4.3	4.4	12.1
2.9	5.0	4.5	12.9
4.2	1.1	2.2	7.7
-0.1	-3.2	-1.6	-4.8
0.5	3.8	10.1	14.9
1.5	2.4	2.8	6.9
4.2	5.0	3.4	13.1

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

TABLE 2
COMPARISON GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2006 prices)

GROWTH IN COMPARISON GOODS PER CAPITA RETAIL EXPENDITURE:										
		3.80		%pa 2008-2021						
ZONE	2006	2006 Minus SFT at 7%	2008	2008 Minus SFT at 9%	2011	2011 Minus SFT at 10.8%	2016	2016 Minus SFT at 12.5%	2021	2021 Minus SFT at 12.5%
1	2,922	2,717	3,148	2,865	3,521	3,141	4,243	3,712	5,113	4,474
2	2,697	2,508	2,906	2,644	3,250	2,899	3,916	3,427	4,719	4,129
3	3,455	3,213	3,723	3,388	4,163	3,714	5,017	4,390	6,045	5,290
4	3,716	3,456	4,004	3,643	4,478	3,994	5,396	4,721	6,502	5,689
5	3,453	3,211	3,720	3,386	4,161	3,711	5,014	4,387	6,042	5,286
6	3,432	3,192	3,698	3,365	4,136	3,689	4,983	4,360	6,005	5,254
7	3,216	2,991	3,465	3,153	3,875	3,457	4,670	4,086	5,627	4,924
8	3,009	2,798	3,242	2,950	3,626	3,234	4,369	3,823	5,265	4,607
9	3,166	2,944	3,411	3,104	3,815	3,403	4,597	4,022	5,540	4,847
10	3,295	3,064	3,550	3,231	3,970	3,542	4,784	4,186	5,765	5,045
11	3,388	3,151	3,650	3,322	4,083	3,642	4,919	4,305	5,928	5,187
12	3,197	2,973	3,445	3,135	3,852	3,436	4,642	4,062	5,594	4,895
13	3,071	2,856	3,309	3,011	3,701	3,301	4,459	3,902	5,373	4,702
14	3,218	2,993	3,467	3,155	3,878	3,459	4,673	4,089	5,630	4,927
15	3,268	3,039	3,521	3,204	3,938	3,513	4,745	4,152	5,718	5,003
16	3,233	3,007	3,483	3,170	3,896	3,475	4,694	4,108	5,657	4,950
17	3,194	2,970	3,441	3,132	3,849	3,433	4,638	4,058	5,588	4,890
18	3,320	3,088	3,577	3,255	4,001	3,569	4,821	4,218	5,809	5,083
19	2,944	2,738	3,172	2,887	3,548	3,164	4,275	3,740	5,151	4,507
20	3,199	2,975	3,447	3,137	3,855	3,438	4,645	4,064	5,597	4,898

SOURCE: Experian Business Strategies March 2008

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

TABLE 3

SURVEY AREA RETAIL EXPENDITURE FORECASTS (2006 prices)

ZONE	COMPARISON GOODS			
	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	211,344	249,066	315,601	391,328
2	185,873	224,754	305,251	364,150
3	127,951	154,575	233,873	310,844
4	97,724	119,131	138,845	162,456
5	81,345	89,265	106,464	126,493
6	55,872	61,496	70,073	112,218
7	196,725	225,152	270,396	323,872
8	118,780	134,086	165,761	208,997
9	104,359	117,975	145,923	183,413
10	120,639	135,267	165,236	205,485
11	130,007	146,754	180,458	224,621
12	108,290	123,464	154,391	195,125
13	88,485	100,618	125,340	158,915
14	94,305	106,064	130,596	163,019
15	125,181	141,359	174,258	219,121
16	157,942	178,206	221,112	278,314
17	292,188	333,768	398,865	491,206
18	189,428	207,456	237,373	281,458
19	109,965	121,153	148,649	197,213
20	223,770	249,097	301,444	373,427
TOTAL	2,820,175	3,218,705	3,989,911	4,971,675

SOURCE: Experian Business Strategies March 2008

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

TABLE 4
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Cambridge City Centre			
	2008 (%)	2011 (%)	2016 (%)	2021 (%)
1	63	63	63	63
2	69	69	69	69
3	63	63	63	63
4	65	65	65	65
5	70	70	70	70
6	55	55	55	55
7	32	32	32	32
8	5	5	5	5
9	14	14	14	14
10	6	6	6	6
11	7	7	7	7
12	25	25	25	25
13	35	35	35	35
14	16	16	16	16
15	46	46	46	46
16	6	6	6	6
17	11	11	11	11
18	14	14	14	14
19	3	3	3	3
20	9	9	9	9

TABLE 5
COMPARISON GOODS SPEND (£)

Catchment Zone	Cambridge City Centre			
	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	132,419	156,054	197,742	245,189
2	128,538	155,426	211,093	251,823
3	80,676	97,463	147,462	195,994
4	63,483	77,389	90,195	105,533
5	56,562	62,069	74,028	87,955
6	30,986	34,105	38,862	62,235
7	63,410	72,573	87,156	104,393
8	6,318	7,132	8,817	11,117
9	14,392	16,269	20,124	25,294
10	6,913	7,752	9,469	11,776
11	9,558	10,789	13,267	16,514
12	26,759	30,509	38,151	48,217
13	30,764	34,982	43,577	55,250
14	14,991	16,860	20,760	25,914
15	57,113	64,494	79,503	99,972
16	8,857	9,994	12,400	15,608
17	31,864	36,399	43,498	53,568
18	27,440	30,052	34,385	40,771
19	3,669	4,042	4,960	6,580
20	19,651	21,875	26,472	32,794
Sub-Total	814,364	946,227	1,201,922	1,496,497
Inflow	100,652	116,949	148,552	184,960
Total	915,016	1,063,177	1,350,475	1,681,457

Source: Tables 3 & 4

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

TABLE 6
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Cambridge City Retail Warehousing				South Cambridgeshire			
	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2008 (%)	2011 (%)	2016 (%)	2021 (%)
1	18.1	18.1	18.1	18.1	2.2	2.2	2.2	2.2
2	16.4	16.4	16.4	16.4	0.3	0.3	0.3	0.3
3	14.0	14.0	14.0	14.0	1.1	1.1	1.1	1.1
4	13.0	13.0	13.0	13.0	4.8	4.8	4.8	4.8
5	11.8	11.8	11.8	11.8	0.6	0.6	0.6	0.6
6	18.7	18.7	18.7	18.7	0.2	0.2	0.2	0.2
7	9.2	9.2	9.2	9.2	0.6	0.6	0.6	0.6
8	0.3	0.3	0.3	0.3	0.1	0.1	0.1	0.1
9	1.6	1.6	1.6	1.6	0.0	0.0	0.0	0.0
10	0.5	0.5	0.5	0.5	0.0	0.0	0.0	0.0
11	0.3	0.3	0.3	0.3	0.0	0.0	0.0	0.0
12	6.0	6.0	6.0	6.0	0.4	0.4	0.4	0.4
13	5.9	5.9	5.9	5.9	0.0	0.0	0.0	0.0
14	0.7	0.7	0.7	0.7	0.4	0.4	0.4	0.4
15	8.2	8.2	8.2	8.2	1.4	1.4	1.4	1.4
16	0.4	0.4	0.4	0.4	0.0	0.0	0.0	0.0
17	1.4	1.4	1.4	1.4	0.4	0.4	0.4	0.4
18	1.4	1.4	1.4	1.4	0.0	0.0	0.0	0.0
19	0.6	0.6	0.6	0.6	0.0	0.0	0.0	0.0
20	0.3	0.3	0.3	0.3	0.0	0.0	0.0	0.0

TABLE 7
COMPARISON GOODS SPEND (£)

Catchment Zone	Cambridge City Retail Warehousing				South Cambridgeshire			
	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	38,206	45,025	57,053	70,742	4,652	5,483	6,947	8,614
2	30,442	36,809	49,993	59,639	553	669	908	1,084
3	17,913	21,640	32,741	43,517	1,359	1,642	2,484	3,302
4	12,685	15,464	18,023	21,088	4,708	5,740	6,690	7,827
5	9,624	10,561	12,596	14,966	493	541	645	766
6	10,463	11,516	13,122	21,015	125	137	156	250
7	18,023	20,627	24,772	29,671	1,169	1,338	1,606	1,924
8	310	350	433	546	84	95	118	148
9	1,700	1,922	2,378	2,988	0	0	0	0
10	619	694	848	1,054	0	0	0	0
11	350	395	485	604	0	0	0	0
12	6,456	7,361	9,205	11,634	391	446	558	705
13	5,178	5,887	7,334	9,299	0	0	0	0
14	663	745	918	1,145	408	458	564	705
15	10,315	11,648	14,359	18,055	1,745	1,971	2,429	3,055
16	631	712	883	1,112	0	0	0	0
17	4,234	4,836	5,779	7,117	1,167	1,333	1,593	1,962
18	2,723	2,982	3,412	4,046	0	0	0	0
19	623	686	842	1,116	0	0	0	0
20	622	692	838	1,038	0	0	0	0
TOTAL	171,778	200,553	256,014	320,393	16,855	19,852	24,700	30,343

Source: Tables 3 & 6

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

TABLE 8
CITY CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sqm
Cambridge City Centre	92,479

Source: GVA Grimley

TABLE 9
RETAIL WAREHOUSING FLOORSPACE

	Net Floorspace Sqm	Sales Density £ per sqm	Turnover 2006 £000's
Beehive Retail Park			
Rosebys	558	1,700	948
TK Maxx	1,590	2,732	4,345
Toys R Us	1,412	1,531	2,162
Carpetright	741	1,315	974
JJB Sports	995	2,188	2,178
Allied Carpets	796	1,404	1,117
Vacant	792		
Homestore & More	1,483	2,500	3,707
Harveys	544	2,500	1,359
Conway Pine	923	2,000	1,846
Pets at Home	461	2,452	1,131
Maplin Electronics	307	3,864	1,186
Vacant	1,084		
Cambridge Retail Park, CB5 8WR			
Currys	1,862	5,755	10,715
Homebase	4,459	1,596	7,117
ScS	595	1,821	1,083
PC World	1,487	7,285	10,834
Boots	790	8,196	6,472
Argos	792	4,000	3,169
Sports World	743	3,500	2,601
Burton/Dorothy Perkins/Evans	743	4,500	3,344
Halfords	745	2,409	1,794
Furniture Village	768	3,145	2,415
Habitat	1,130	2,011	2,271
MFI	1,486	2,445	3,634
Multiyork	800	2,500	2,000
Stand-alone Units (Cambridge City)			
B&Q, Newmarket Road	3,714	2,318	8,609
Comet, Newmarket Road, CB5 8JL	1,886	7,032	13,260
Focus, Tenison Road, CB1 2RY	1,000	1,277	1,277
Sub Total Cambridge City	34,685	2,928	101,549
Stand-alone Units (South Cambridgeshire)			
Tesco Extra, Bar Hill (comparison floorspace)	4,696	5,000	23,480
Sub Total South Cambridgeshire	4,696	5,000	23,480
TOTAL	39,381	3,175	125,029

Source: GVA Grimley / Trevor Wood Database / Mintel Retail Rankings 2007

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

TABLE 10
RETAIL COMMITMENTS - COMPARISON GOODS

	Net Flsp (sqm)	Co Average Sales (£ per sqm net)	Total Turnover 2008 (£000s)	Total Turnover 2011 (£000s)	Total Turnover 2016 (£000s)	Total Turnover 2021 (£000s)
South Cambridgeshire						
Land at Shardelowes Farm, Fulbourn	304	1,500	456	484	534	590
175 St Neots Road, Hardwick	72	1,500	108	115	127	140
Building at North Road Farm, Royston	202	1,500	303	322	355	392
Cambridge City						
62-74 Burleigh Street, Cambridge	3,994	3,000	11982	12,715	14,039	15,500
Unit 5, Coldhams Lane, Beehive Centre	362	2,000	724	768	848	937
TOTAL	4,934		13,573	14,404	15,903	17,558

Source: Cambridge City Council, South Cambridgeshire District Council and Cambridgeshire County Council

TABLE 11
RETAIL PIPELINE - COMPARISON GOODS

	Net Flsp (sqm)	Co Average Sales (£ per sqm net)	Total Turnover 2008 (£000s)	Total Turnover 2011 (£000s)	Total Turnover 2016 (£000s)	Total Turnover 2021 (£000s)
South Cambridgeshire						
Cambourne	2,968	3,000	8,904	9,449	10,432	11,518
Northstowe	21,750	4,000	87,000	92,325	101,934	112,544
Cambridge City						
East Cambridge	7,000	3,000	21,000	22,285	24,605	27,166
Station Area	697	3,000	2,091	2,219	2,450	2,705
TOTAL	29,447		118,995	126,278	139,421	153,932

Source: Cambridge City Council, South Cambridgeshire District Council and Cambridgeshire County Council

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

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 12

FUTURE SHOP GLOBAL FLOORSPACE CAPACITY CAMBRIDGE CITY WITH COMMITMENTS

GROWTH IN SALES PER SQ M	2	%pa '08-'21		
	COMPARISON GOODS			
	2008	2011	2016	2021
Total Available Expenditure (£000)	2,820,175	3,218,705	3,989,911	4,971,675
Market Share from Survey Area	35.0	35.6	36.5	36.5
Survey Area Residents Spending	986,142	1,146,781	1,457,936	1,816,890
Inflow to Cambridge (11%) from beyond survey area (£000)	100,652	116,949	148,552	184,960
Total Town Centre Comparison Turnover (£000)	1,086,794	1,263,730	1,606,488	2,001,850
Existing Shop Floorspace (sqm net)	127,164	127,164	127,164	127,164
Sales per sqm net (£)	8,546	9,069	10,013	11,056
Sales from Existing Floorspace (£000)	1,086,794	1,153,314	1,273,352	1,405,884
Sales from Committed Floorspace (£000)	0	13,484	14,887	16,437
Residual Spending to Support new shops (£000)	0	96,932	318,249	579,530
Sales per sqm net in new shops (£)	7,000	7,000	7,000	7,000
Capacity for new floorspace (sqm net)	0	13,847	45,464	82,790

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

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 13

FUTURE SHOP FLOORSPACE SOUTH CAMBRIDGESHIRE WITH COMMITMENTS

GROWTH IN SALES PER SQ M		2	%pa '08-'21		
	COMPARISON GOODS				
	2008	2011	2016	2021	
Total Available Expenditure (£000)	2,820,175	3,218,705	3,989,911	4,971,675	
Market Share from Survey Area	0.6	0.6	0.6	0.6	
Survey Area Residents Spending	16,855	19,852	24,700	30,343	
Inflow from beyond survey area (£000)	0	0	0	0	
Total Comparison Turnover (£000)	16,855	19,852	24,700	30,343	
Existing Shop Floorspace (sqm net)	4,696	4,696	4,696	4,696	
Sales per sqm net (£)	3,589	3,809	4,205	4,643	
Sales from Existing Floorspace (£000)	16,855	17,886	19,748	21,803	
Sales from Committed Floorspace (£000)	0	920	1,016	1,122	
Residual Spending to Support new shops (£000)	0	1,046	3,936	7,418	
Sales per sqm net in new shops (£)	7,000	7,000	7,000	7,000	
Capacity for new floorspace (sqm net)	0	149	562	1,060	

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

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 14

FUTURE SHOP GLOBAL FLOORSPACE CAPACITY CAMBRIDGE SUB REGION WITH COMMITMENTS

GROWTH IN SALES PER SQ M	2	%pa '08-'21		
	COMPARISON GOODS			
	2008	2011	2016	2021
Total Available Expenditure (£000)	2,820,175	3,218,705	3,989,911	4,971,675
Market Share from Survey Area	36	36	37	37
Survey Area Residents Spending	1,002,997	1,166,633	1,482,636	1,847,232
Inflow to Cambridge (11%) from beyond survey area (£000)	100,652	116,949	148,552	184,960
Total Town Centre Comparison Turnover (£000)	1,103,648	1,283,583	1,631,188	2,032,193
Existing Shop Floorspace (sqm net)	131,860	131,860	131,860	131,860
Sales per sqm net (£)	8,370	8,882	9,807	10,827
Sales from Existing Floorspace (£000)	1,103,648	1,171,201	1,293,100	1,427,687
Sales from Committed Floorspace (£000)	0	14,404	15,903	17,558
Residual Spending to Support new shops (£000)	0	97,978	322,185	586,947
Sales per sqm net in new shops (£)	7,000	7,000	7,000	7,000
Capacity for new floorspace (sqm net)	0	13,997	46,026	83,850

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

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 15

CHANGE TO COMPETING CENTRES MARKET SHARE

FUTURE SHOP GLOBAL FLOORSPACE CAPACITY CAMBRIDGE SUB REGION WITH COMMITMENTS

GROWTH IN SALES PER SQ M	2		%pa '08-'21	
	COMPARISON GOODS			
	2008	2011	2016	2021
Total Available Expenditure (£000)	2,820,175	3,218,705	3,989,911	4,971,675
Market Share from Survey Area	36	36	35	35
Survey Area Residents Spending	1,002,997	1,142,942	1,401,624	1,747,981
Inflow to Cambridge (11%) from beyond survey area (£000)	100,652	114,021	138,540	172,693
Total Town Centre Comparison Turnover (£000)	1,103,648	1,256,963	1,540,163	1,920,675
Existing Shop Floorspace (sqm net)	131,860	131,860	131,860	131,860
Sales per sqm net (£)	8,370	8,882	9,807	10,827
Sales from Existing Floorspace (£000)	1,103,648	1,171,201	1,293,100	1,427,687
Sales from Committed Floorspace (£000)	0	14,404	15,903	17,558
Residual Spending to Support new shops (£000)	0	71,359	231,160	475,430
Sales per sqm net in new shops (£)	7,000	7,000	7,000	7,000
Capacity for new floorspace (sqm net)	0	10,194	33,023	67,919

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

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 16

FUTURE SHOP GLOBAL FLOORSPACE CAPACITY CAMBRIDGE SUB REGION WITH PIPELINE

GROWTH IN SALES PER SQ M	2		%pa '08-'21	
	2008	2011	2016	2021
Total Available Expenditure (£000)	2,820,175	3,218,705	3,989,911	4,971,675
Market Share from Survey Area	35.6	36.2	37.2	37.2
Survey Area Residents Spending	1,002,997	1,166,633	1,482,636	1,847,232
Inflow to Cambridge (11%) from beyond survey area (£000)	100,652	116,949	148,552	184,960
Total Town Centre Comparison Turnover (£000)	1,103,648	1,283,583	1,631,188	2,032,193
Existing Shop Floorspace (sqm net)	131,860	131,860	131,860	131,860
Sales per sqm net (£)	8,370	8,882	9,807	10,827
Sales from Existing Floorspace (£000)	1,103,648	1,171,201	1,293,100	1,427,687
Sales from Committed/Pipeline Floorspace (£000)	0	23,852	28,785	171,490
Residual Spending to Support new shops (£000)	0	88,530	309,303	433,015
Sales per sqm net in new shops (£)	7,000	7,000	7,000	7,000
Capacity for new floorspace (sqm net)	0	12,647	44,186	61,859

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

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 17

CHANGE TO COMPETING CENTRES MARKET SHARE

FUTURE SHOP GLOBAL FLOORSPACE CAPACITY CAMBRIDGE SUB REGION WITH PIPELINE

GROWTH IN SALES PER SQ M	2	%pa '08-'21		
	COMPARISON GOODS			
	2008	2011	2016	2021
Total Available Expenditure (£000)	2,820,175	3,218,705	3,989,911	4,971,675
Market Share from Survey Area	36	36	35	35
Survey Area Residents Spending	1,002,997	1,142,942	1,401,624	1,747,981
Inflow to Cambridge (11%) from beyond survey area (£000)	100,652	114,021	138,540	172,693
Total Town Centre Comparison Turnover (£000)	1,103,648	1,256,963	1,540,163	1,920,675
Existing Shop Floorspace (sqm net)	131,860	131,860	131,860	131,860
Sales per sqm net (£)	8,370	8,882	9,807	10,827
Sales from Existing Floorspace (£000)	1,103,648	1,171,201	1,293,100	1,427,687
Sales from Committed Floorspace (£000)	0	23,852	28,785	171,490
Residual Spending to Support new shops (£000)	0	61,910	218,278	321,497
Sales per sqm net in new shops (£)	7,000	7,000	7,000	7,000
Capacity for new floorspace (sqm net)	0	8,844	31,183	45,928

APPENDIX 10

NORTHSTOWE IMPACT ASSESSMENT

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

**TABLE 1
SURVEY AREA POPULATION FORECASTS**

Catchment Zone	Postcode Sector Groupings	2008	2011	2016	2021
1	CB3 0, CB4 0/1/2/3/6/9, CB5 8	73,769	79,302	85,011	87,477
2	CB1 1/2/3/7/8/9, CB2 1/2/3, CB3 9	70,291	77,531	89,083	88,192
3	CB4 5/8, CB5 9/0	37,771	41,624	53,278	58,766
4	CB3 6/7/8	26,822	29,826	29,408	28,556
5	CB2 4/5/6	24,027	24,051	24,267	23,928
6	CB1 5/6	16,604	16,670	16,070	21,357
7	CB6 1/2/3, CB7 4/5	62,389	65,134	66,176	65,779
8	IP26 4, IP27 0/9, PE38 0/9	40,261	41,458	43,359	45,368
9	IP28 6/7/8, IP29 4/5	33,619	34,668	36,277	37,840
10	CO10 7/8, CO9 3/4/1/2	37,342	38,193	39,470	40,734
11	CM22 6, CM23 1, CM24 1/8, CM6 2/3, CM7 4/5	39,137	40,299	41,923	43,305
12	CB8 0/7/8/9	34,547	35,929	38,010	39,866
13	CB9 0/7/8/9	29,387	30,482	32,124	33,800
14	CO10 1/2, CB11 3/4	29,889	30,664	31,942	33,089
15	SG8 8/9/0/5/6/7	39,068	40,243	41,969	43,796
16	SG18 0/8/9, SG19 1/2/3	49,826	51,282	53,830	56,229
17	PE19 1/2/5/6/7/8, PE28 0/4/9, PE29 1/2/3/6/7	93,302	97,221	98,290	100,452
18	PE26 1/2, PE27 3/4/5/6, PE28 2/3/5	58,193	58,135	56,274	55,374
19	PE15 0/8/9, PE16 6	38,096	38,286	39,741	43,755
20	SG11 2, SG5 4, SG6 1/2/3/4, SG7 5/6, SG9 0/9, SG11 1	71,343	72,444	74,167	76,247
TOTAL		905,683	943,442	990,672	1,023,911

SOURCE: Experian Business Strategies March 2008
Cambridgeshire County Council Mid 2006 population estimates by ward transposed into zones and growth rates used in **BOLD**

**TABLE 1A
POPULATION GROWTH RATES**

2008-2011 (%)	2011-2016 (%)	2016-2021 (%)	2008-2021 (%)
7.5	7.2	2.9	18.6
10.3	14.9	-1.0	25.5
10.2	28.0	10.3	55.6
11.2	-1.4	-2.9	6.5
0.1	0.9	-1.4	-0.4
0.4	-3.6	32.9	28.6
4.4	1.6	-0.6	5.4
3.0	4.6	4.6	12.7
3.1	4.6	4.3	12.6
2.3	3.3	3.2	9.1
3.0	4.0	3.3	10.6
4.0	5.8	4.9	15.4
3.7	5.4	5.2	15.0
2.6	4.2	3.6	10.7
3.0	4.3	4.4	12.1
2.9	5.0	4.5	12.9
4.2	1.1	2.2	7.7
-0.1	-3.2	-1.6	-4.8
0.5	3.8	10.1	14.9
1.5	2.4	2.8	6.9
4.2	5.0	3.4	13.1

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

TABLE 2
COMPARISON GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2006 prices)

GROWTH IN COMPARISON GOODS PER CAPITA RETAIL EXPENDITURE:										
		3.80		%pa 2008-2021						
ZONE	2006	2006 Minus SFT at 7%	2008	2008 Minus SFT at 9%	2011	2011 Minus SFT at 10.8%	2016	2016 Minus SFT at 12.5%	2021	2021 Minus SFT at 12.5%
1	2,922	2,717	3,148	2,865	3,521	3,141	4,243	3,712	5,113	4,474
2	2,697	2,508	2,906	2,644	3,250	2,899	3,916	3,427	4,719	4,129
3	3,455	3,213	3,723	3,388	4,163	3,714	5,017	4,390	6,045	5,290
4	3,716	3,456	4,004	3,643	4,478	3,994	5,396	4,721	6,502	5,689
5	3,453	3,211	3,720	3,386	4,161	3,711	5,014	4,387	6,042	5,286
6	3,432	3,192	3,698	3,365	4,136	3,689	4,983	4,360	6,005	5,254
7	3,216	2,991	3,465	3,153	3,875	3,457	4,670	4,086	5,627	4,924
8	3,009	2,798	3,242	2,950	3,626	3,234	4,369	3,823	5,265	4,607
9	3,166	2,944	3,411	3,104	3,815	3,403	4,597	4,022	5,540	4,847
10	3,295	3,064	3,550	3,231	3,970	3,542	4,784	4,186	5,765	5,045
11	3,388	3,151	3,650	3,322	4,083	3,642	4,919	4,305	5,928	5,187
12	3,197	2,973	3,445	3,135	3,852	3,436	4,642	4,062	5,594	4,895
13	3,071	2,856	3,309	3,011	3,701	3,301	4,459	3,902	5,373	4,702
14	3,218	2,993	3,467	3,155	3,878	3,459	4,673	4,089	5,630	4,927
15	3,268	3,039	3,521	3,204	3,938	3,513	4,745	4,152	5,718	5,003
16	3,233	3,007	3,483	3,170	3,896	3,475	4,694	4,108	5,657	4,950
17	3,194	2,970	3,441	3,132	3,849	3,433	4,638	4,058	5,588	4,890
18	3,320	3,088	3,577	3,255	4,001	3,569	4,821	4,218	5,809	5,083
19	2,944	2,738	3,172	2,887	3,548	3,164	4,275	3,740	5,151	4,507
20	3,199	2,975	3,447	3,137	3,855	3,438	4,645	4,064	5,597	4,898

SOURCE: Experian Business Strategies March 2008

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

TABLE 3

SURVEY AREA RETAIL EXPENDITURE FORECASTS (2006 prices)

ZONE	COMPARISON GOODS			
	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	211,344	249,066	315,601	391,328
2	185,873	224,754	305,251	364,150
3	127,951	154,575	233,873	310,844
4	97,724	119,131	138,845	162,456
5	81,345	89,265	106,464	126,493
6	55,872	61,496	70,073	112,218
7	196,725	225,152	270,396	323,872
8	118,780	134,086	165,761	208,997
9	104,359	117,975	145,923	183,413
10	120,639	135,267	165,236	205,485
11	130,007	146,754	180,458	224,621
12	108,290	123,464	154,391	195,125
13	88,485	100,618	125,340	158,915
14	94,305	106,064	130,596	163,019
15	125,181	141,359	174,258	219,121
16	157,942	178,206	221,112	278,314
17	292,188	333,768	398,865	491,206
18	189,428	207,456	237,373	281,458
19	109,965	121,153	148,649	197,213
20	223,770	249,097	301,444	373,427
TOTAL	2,820,175	3,218,705	3,989,911	4,971,675

SOURCE: Experian Business Strategies March 2008

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

TABLE 4
NORTHSTOWE TURNOVER

	Net Floor (sqm)	Co Average Sales (£ per sqm net)	Total Turnover 2008 (£000s)	Total Turnover 2011 (£000s)	Total Turnover 2016 (£000s)	Total Turnover 2021 (£000s)
Northstowe	21,750	5,000	108,750	115,406	127,418	140,680
TOTAL	21,750		108,750	115,406	127,418	140,680

TABLE 5a
NORTHSTOWE TRADE DRAW 2016

	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	TOTAL
DRAW FROM ZONES (%)	7.0	3.0	45.0	20.0	5.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.0	10.0	0.0	0.0	100
DRAW FROM ZONES (£m)	8,919	3,823	57,338	25,484	6,371	0	0	0	0	0	0	0	0	0	0	0	12,742	12,742	0	0	127,418
MARKET SHARE UPLIFT (%)	2.8	1.3	24.5	18.4	6.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2	5.4	0.0	0.0	

TABLE 5b
NORTHSTOWE TRADE DRAW 2021

	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	TOTAL
DRAW FROM ZONES (%)	7.0	3.0	45.0	20.0	5.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.0	10.0	0.0	0.0	100
DRAW FROM ZONES (£m)	9,848	4,220	63,306	28,136	7,034	0	0	0	0	0	0	0	0	0	0	0	14,068	14,068	0	0	140,680
MARKET SHARE UPLIFT (%)	2.5	1.2	20.4	17.3	5.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.9	5.0	0.0	0.0	

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

TABLE 6
COMPARISON GOODS ALLOCATION 2008
% 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 %
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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	47.8	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

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

TABLE 7
COMPARISON GOODS ALLOCATION 2008
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)
Cambridge	132,419	128,538	80,676	63,483	56,562	30,986	63,410	6,318	14,392	6,913	9,558	26,759	30,764	14,991	57,113	8,857	31,864	27,440	3,669	19,651	814,364
Peterborough	2,773	486	1,567	848	0	0	6,649	2,763	0	0	290	0	231	0	1,029	0	69,215	71,264	38,399	0	195,513
Bury St Edmunds	1,864	0	1,005	580	146	650	3,960	21,709	54,670	14,961	257	15,593	8,615	3,756	444	0	0	0	0	0	128,210
Ely	1,807	1,015	4,954	590	0	0	67,896	2,385	297	0	0	566	0	0	0	0	0	990	1,440	0	81,940
Stevenage	0	0	0	431	809	0	0	197	0	269	519	0	379	0	18,517	26,390	0	0	0	45,112	92,622
Newmarket	2,591	1,908	7,355	0	169	4,766	6,581	978	7,501	0	0	45,582	342	0	0	0	0	0	0	464	78,237
Bedford	0	0	1,476	686	0	0	439	1,325	0	0	0	0	0	0	0	35,190	13,810	0	0	585	53,511
Huntingdon	0	0	2,371	1,073	0	108	292	0	0	216	0	0	475	0	0	0	74,430	34,356	3,209	463	116,993
Bishop Stortford	0	0	0	0	0	0	0	0	0	0	27,294	0	0	6,826	0	649	0	0	0	21,397	56,166
King's Lynn	0	0	475	0	0	0	4,573	35,916	0	0	0	0	0	0	0	0	0	0	2,778	0	43,742
Colchester	0	0	0	0	0	0	0	0	557	28,792	3,541	0	862	12,426	0	0	0	0	0	0	46,178
St Neots	0	385	0	552	0	0	0	0	0	0	0	0	0	0	0	5,111	51,041	397	85	0	57,571
Sudbury	0	0	0	0	0	0	0	0	1,577	23,142	257	0	231	23,393	1,269	706	0	0	0	2,817	53,393
St Ives	602	690	668	3,672	63	0	1,244	0	144	0	0	0	0	0	0	1,263	4,860	25,178	787	159	39,330
Chelmsford	0	0	0	0	381	0	0	0	0	4,479	17,125	0	231	727	0	0	0	0	0	0	22,943
Milton Keynes	1,386	385	229	175	209	0	380	0	0	0	0	271	0	350	0	7,461	1,532	0	287	3,243	15,909
Norwich	602	1,705	0	175	537	223	2,867	6,743	730	448	0	848	0	0	0	0	0	0	0	585	15,463
SUB-TOTAL	144,044	135,112	100,778	72,264	58,676	36,733	158,292	76,333	79,868	79,221	58,842	89,619	42,130	62,469	78,372	85,628	246,751	159,624	50,654	94,475	1,912,084
Other	67,301	50,762	27,172	25,460	22,469	19,140	38,433	40,447	24,491	41,419	71,165	18,672	46,355	31,836	46,810	72,314	45,437	29,804	59,310	129,295	908,091
TOTAL	211,344	185,873	127,951	97,724	81,145	55,872	196,725	118,780	104,359	120,639	130,007	108,290	88,485	94,305	125,181	157,942	292,188	189,428	109,965	223,770	2,820,175

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

TABLE 8
COMPARISON GOODS MARKET SHARE WITHOUT NORTHSTOWE 2016
% 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 %
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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

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

TABLE 9
COMPARISON GOODS ALLOCATION WITHOUT NORTHSTOWE 2016
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)
Cambridge	197,742	211,093	147,462	90,195	74,028	38,862	87,156	8,817	20,124	9,469	13,267	38,151	43,577	20,760	79,503	12,400	43,498	34,385	4,960	26,472	1,201,922
Peterborough	4,140	797	2,865	1,204	0	0	9,139	3,855	0	0	403	0	327	0	1,433	0	94,485	89,301	51,907	0	259,857
Bury St Edmunds	2,783	0	1,837	824	191	815	5,444	30,295	76,444	20,492	357	22,231	12,204	5,201	618	0	0	0	0	0	179,735
Ely	2,698	1,667	9,055	838	0	0	93,322	3,329	416	0	0	807	0	0	0	0	0	1,240	1,947	0	115,319
Stevenage	0	0	0	612	1,059	0	0	274	0	369	721	0	536	0	25,777	36,945	0	0	0	60,771	127,063
Newmarket	3,869	3,134	13,444	0	221	5,977	9,046	1,365	10,489	0	0	64,987	484	0	0	0	0	0	0	625	113,640
Bedford	0	0	2,699	974	0	0	603	1,849	0	0	0	0	0	0	0	49,265	18,852	0	0	787	75,030
Huntingdon	0	0	4,335	1,524	0	135	402	0	0	296	0	0	673	0	0	0	101,604	43,051	4,338	624	156,982
Bishop Stortford	0	0	0	0	0	0	0	0	0	0	37,885	0	0	9,453	0	909	0	0	0	28,824	77,072
King's Lynn	0	0	868	0	0	0	6,286	50,122	0	0	0	0	0	0	0	0	0	0	3,755	0	61,031
Colchester	0	0	0	0	0	0	0	0	779	39,436	4,915	0	1,221	17,208	0	0	0	0	0	0	63,559
St Neots	0	632	0	785	0	0	0	0	0	0	0	0	0	0	0	7,156	69,675	497	115	0	78,860
Sudbury	0	0	0	0	0	0	0	0	2,205	31,697	357	0	327	32,395	1,766	988	0	0	0	3,795	73,532
St Ives	899	1,132	1,222	5,217	82	0	1,709	0	202	0	0	0	0	0	0	1,768	6,635	31,551	1,064	214	51,695
Chelmsford	0	0	0	0	499	0	0	0	0	6,134	23,770	0	327	1,007	0	0	0	0	0	0	31,738
Milton Keynes	2,070	632	419	249	273	0	522	0	0	0	0	387	0	484	0	10,445	2,091	0	388	4,369	22,330
Norwich	899	2,800	0	249	703	280	3,941	9,410	1,020	613	0	1,209	0	0	0	0	0	0	0	787	21,912
SUB-TOTAL	215,101	221,888	184,206	102,672	77,057	46,069	217,570	109,316	111,678	108,506	81,676	127,771	59,678	86,509	109,097	119,875	336,840	200,025	68,474	127,269	2,711,276
Other	100,500	83,363	49,667	36,173	29,407	24,004	52,826	56,445	34,245	56,730	98,782	26,620	65,662	44,087	65,161	101,237	62,026	37,348	80,175	174,175	1,278,634
TOTAL	315,601	305,251	233,873	138,845	106,464	70,073	270,396	165,761	145,923	165,236	180,458	154,391	125,340	130,596	174,258	221,112	398,865	237,373	148,649	301,444	3,989,911

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

TABLE 10
COMPARISON GOODS ALLOCATION WITH NORTHSTOWE 2016

% 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 %
NORTHSTOWE	2.8	1.3	24.5	18.4	6.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2	5.4	0.0	0.0
Cambridge	59.9	67.9	51.8	55.6	63.5	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
Peterborough	1.3	0.3	0.1	0.0	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
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
Ely	0.9	0.5	0.7	0.0	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
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
Newmarket	1.2	1.0	1.6	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
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
Huntingdon	0.0	0.0	0.3	0.0	0.0	0.2	0.1	0.0	0.0	0.2	0.0	0.0	0.5	0.0	0.0	0.0	22.3	15.7	2.9	0.2
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
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
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
St Neots	0.0	0.2	0.0	0.0	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
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
St Ives	0.3	0.4	0.1	0.8	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	10.3	0.7	0.1
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
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
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	72.6	81.6	76.8	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	84.2	46.1	42.2
Other	31.8	27.3	18.4	23.2	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

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

TABLE 11
COMPARISON GOODS ALLOCATION WITH NORTHSTOWE 2016
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)
NORTHSTOWE	8,919	3,823	57,338	25,484	6,371	0	0	0	0	0	0	0	0	0	0	0	12,742	12,742	0	0	127,418
Cambridge	188,905	207,125	121,035	77,185	67,640	38,862	87,156	8,817	20,124	9,469	13,267	38,151	43,577	20,760	79,503	12,400	43,498	34,385	4,960	26,472	1,143,292
Peterborough	4,140	797	292	0	0	0	9,139	3,855	0	0	403	0	327	0	1,433	0	94,485	89,301	51,907	0	256,080
Bury St Edmunds	2,783	0	1,837	824	191	815	5,444	30,295	76,444	20,492	357	22,231	12,204	5,201	618	0	0	0	0	0	179,735
Ely	2,698	1,667	1,571	5	0	0	93,322	3,329	416	0	0	807	0	0	0	0	0	1,240	1,947	0	107,002
Stevenage	0	0	0	612	1,059	0	0	274	0	369	721	0	536	0	25,777	36,945	0	0	0	60,771	127,063
Newmarket	3,869	3,134	3,856	0	221	5,977	9,046	1,365	10,489	0	0	64,987	484	0	0	0	0	0	0	625	104,051
Bedford	0	0	2,699	974	0	0	603	1,849	0	0	0	0	0	0	0	49,265	18,852	0	0	787	75,030
Huntingdon	0	0	710	0	0	135	402	0	0	296	0	0	673	0	0	0	88,841	37,354	4,338	624	133,372
Bishop Stortford	0	0	0	0	0	0	0	0	0	0	37,885	0	0	9,453	0	909	0	0	0	28,824	77,072
King's Lynn	0	0	868	0	0	0	6,286	50,122	0	0	0	0	0	0	0	0	0	0	3,755	0	61,031
Colchester	0	0	0	0	0	0	0	0	779	39,436	4,915	0	1,221	17,208	0	0	0	0	0	0	63,559
St Neots	0	632	0	0	0	0	0	0	0	0	0	0	0	0	0	7,156	69,675	497	115	0	78,076
Sudbury	0	0	0	0	0	0	0	0	2,205	31,697	357	0	327	32,395	1,766	988	0	0	0	3,795	73,532
St Ives	899	1,132	169	1,052	82	0	1,709	0	202	0	0	0	0	0	0	1,768	6,635	24,429	1,064	214	39,356
Chelmsford	0	0	0	0	499	0	0	0	0	6,134	23,770	0	327	1,007	0	0	0	0	0	0	31,738
Milton Keynes	2,070	632	419	249	273	0	522	0	0	0	0	387	0	484	0	10,445	2,091	0	388	4,369	22,330
Norwich	899	2,800	0	249	703	280	3,941	9,410	1,020	613	0	1,209	0	0	0	0	0	0	0	787	21,912
SUB-TOTAL	215,184	221,742	190,794	106,634	77,040	46,069	217,570	109,316	111,678	108,506	81,676	127,771	59,678	86,509	109,097	119,875	336,818	199,949	68,474	127,269	2,721,648
Other	100,418	83,509	43,079	32,211	29,424	24,004	52,826	56,445	34,245	56,730	98,782	26,620	65,662	44,087	65,161	101,237	62,047	37,424	80,175	174,175	1,268,263
TOTAL	315,601	305,251	233,873	138,845	106,464	70,073	270,396	165,761	145,923	165,236	180,458	154,391	125,340	130,596	174,258	221,112	398,865	237,373	148,649	301,444	3,989,911

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

TABLE 12
COMPARISON GOODS MARKET SHARE WITHOUT NORTHSTOWE 2021
% 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 %
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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
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

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

TABLE 13
COMPARISON GOODS ALLOCATION WITHOUT NORTHSTOWE 2021
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)
Cambridge	245,189	251,823	195,994	105,533	87,955	62,235	104,393	11,117	25,294	11,776	16,514	48,217	55,250	25,914	99,972	15,608	53,568	40,771	6,580	32,794	1,496,497
Peterborough	5,134	951	3,808	1,409	0	0	10,946	4,861	0	0	501	0	415	0	1,801	0	116,359	105,886	68,866	0	320,937
Bury St Edmunds	3,451	0	2,442	965	227	1,305	6,520	38,197	96,084	25,483	444	28,096	15,473	6,492	777	0	0	0	0	0	225,955
Ely	3,346	1,989	12,036	981	0	0	111,778	4,197	523	0	0	1,019	0	0	0	0	0	1,470	2,583	0	139,921
Stevenage	0	0	0	716	1,258	0	0	346	0	458	897	0	680	0	32,413	46,502	0	0	0	75,282	158,554
Newmarket	4,797	3,739	17,869	0	262	9,572	10,835	1,720	13,184	0	0	82,133	614	0	0	0	0	0	0	774	145,499
Bedford	0	0	3,587	1,140	0	0	723	2,332	0	0	0	0	0	0	0	62,009	23,216	0	0	975	93,982
Huntingdon	0	0	5,761	1,783	0	217	481	0	0	369	0	0	853	0	0	0	125,127	51,047	5,755	773	192,165
Bishop Stortford	0	0	0	0	0	0	0	0	0	0	47,157	0	0	11,800	0	1,144	0	0	0	35,707	95,808
King's Lynn	0	0	1,153	0	0	0	7,529	63,195	0	0	0	0	0	0	0	0	0	0	4,982	0	76,860
Colchester	0	0	0	0	0	0	0	0	979	49,042	6,118	0	1,548	21,480	0	0	0	0	0	0	79,167
St Neots	0	754	0	918	0	0	0	0	0	0	0	0	0	0	0	9,007	85,806	589	153	0	97,227
Sudbury	0	0	0	0	0	0	0	0	2,771	39,418	444	0	415	40,438	2,221	1,244	0	0	0	4,702	91,654
St Ives	1,115	1,351	1,624	6,104	98	0	2,047	0	254	0	0	0	0	0	0	2,225	8,171	37,410	1,411	265	62,076
Chelmsford	0	0	0	0	593	0	0	0	0	7,629	29,588	0	415	1,258	0	0	0	0	0	0	39,481
Milton Keynes	2,567	754	557	291	325	0	626	0	0	0	0	489	0	605	0	13,147	2,575	0	515	5,413	27,863
Norwich	1,115	3,340	0	291	836	448	4,720	11,864	1,282	762	0	1,528	0	0	0	0	0	0	0	975	27,163
SUB-TOTAL	266,713	264,701	244,831	120,131	91,553	73,777	260,598	137,829	140,370	134,937	101,664	161,481	75,664	107,986	137,184	150,886	414,821	237,174	90,845	157,660	3,370,808
Other	124,615	99,448	66,013	42,325	34,940	38,442	63,274	71,168	43,043	70,548	122,956	33,644	83,251	55,032	81,937	127,427	76,385	44,284	106,368	215,767	1,600,867
TOTAL	391,328	364,150	310,844	162,456	126,493	112,218	323,872	208,997	183,413	205,485	224,621	195,125	158,915	163,019	219,121	278,314	491,206	281,458	197,213	373,427	4,971,675

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

TABLE 14
COMPARISON GOODS ALLOCATION WITH NORTHSTOWE
% 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 %
NORTHSTOWE	2.5	1.2	20.4	17.3	5.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.9	5.0	0.0	0.0
Cambridge	60.1	68.0	56.0	55.1	64.2	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
Peterborough	1.3	0.3	0.0	0.2	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
Bury St Edmunds	0.9	0.0	0.8	0.6	0.0	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
Ely	0.9	0.5	0.9	0.0	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
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
Newmarket	1.2	1.0	1.7	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
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
Huntingdon	0.0	0.0	0.0	0.0	0.0	0.2	0.1	0.0	0.0	0.2	0.0	0.0	0.5	0.0	0.0	0.0	22.6	15.6	2.9	0.2
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
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
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
St Neots	0.0	0.2	0.0	0.0	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
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
St Ives	0.3	0.4	0.0	0.8	0.0	0.0	0.6	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.8	1.7	10.8	0.7	0.1
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
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
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	81.6	75.5	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	18.4	24.6	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

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TABLE 15
COMPARISON GOODS ALLOCATION WITH NORTHSTOWE
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)
NORTHSTOWE	9,848	4,220	63,306	28,136	7,034	0	0	0	0	0	0	0	0	0	0	0	14,068	14,068	0	0	140,680
Cambridge	235,341	247,603	174,204	89,450	81,238	62,235	104,393	11,117	25,294	11,776	16,514	48,217	55,250	25,914	99,972	15,608	53,568	40,771	6,580	32,794	1,437,839
Peterborough	5,134	951	78	337	0	0	10,946	4,861	0	0	501	0	415	0	1,801	0	116,359	105,886	68,866	0	316,135
Bury St Edmunds	3,451	0	2,442	965	0	1,305	6,520	38,197	96,084	25,483	444	28,096	15,473	6,492	777	0	0	0	0	0	225,728
Ely	3,346	1,989	2,710	6	0	0	111,778	4,197	523	0	0	1,019	0	0	0	0	0	1,470	2,583	0	129,621
Stevenage	0	0	0	716	1,258	0	0	346	0	458	897	0	680	0	32,413	46,502	0	0	0	75,282	158,554
Newmarket	4,797	3,739	5,436	0	262	9,572	10,835	1,720	13,184	0	0	82,133	614	0	0	0	0	0	0	774	133,065
Bedford	0	0	3,587	1,140	0	0	723	2,332	0	0	0	0	0	0	0	62,009	23,216	0	0	975	93,982
Huntingdon	0	0	0	0	0	217	481	0	0	369	0	0	853	0	0	0	111,059	44,015	5,755	773	163,521
Bishop Stortford	0	0	0	0	0	0	0	0	0	0	47,157	0	0	11,800	0	1,144	0	0	0	35,707	95,808
King's Lynn	0	0	1,153	0	0	0	7,529	63,195	0	0	0	0	0	0	0	0	0	0	4,982	0	76,860
Colchester	0	0	0	0	0	0	0	0	979	49,042	6,118	0	1,548	21,480	0	0	0	0	0	0	79,167
St Neots	0	754	0	15	0	0	0	0	0	0	0	0	0	0	9,007	85,806	589	153	0	96,324	
Sudbury	0	0	0	0	0	0	0	0	2,771	39,418	444	0	415	40,438	2,221	1,244	0	0	0	4,702	91,654
St Ives	1,115	1,351	70	1,230	0	0	2,047	0	254	0	0	0	0	0	2,225	8,171	30,374	1,411	265	48,514	
Chelmsford	0	0	0	0	593	0	0	0	0	7,629	29,588	0	415	1,258	0	0	0	0	0	0	39,481
Milton Keynes	2,567	754	557	291	325	0	626	0	0	0	0	489	0	605	0	13,147	2,575	0	515	5,413	27,863
Norwich	1,115	3,340	0	291	836	448	4,720	11,864	1,282	762	0	1,528	0	0	0	0	0	0	0	975	27,163
SUB-TOTAL	266,713	264,701	253,542	122,577	91,546	73,777	260,598	137,829	140,370	134,937	101,664	161,481	75,664	107,986	137,184	150,886	414,821	237,174	90,845	157,660	3,381,958
Other	124,615	99,448	57,301	39,879	34,947	38,442	63,274	71,168	43,043	70,548	122,956	33,644	83,251	55,032	81,937	127,427	76,385	44,284	106,368	215,767	1,589,717
TOTAL	391,328	364,150	310,844	162,456	126,493	112,218	323,872	208,997	183,413	205,485	224,621	195,125	158,915	163,019	219,121	278,314	491,206	281,458	197,213	373,427	4,971,675

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TABLE 16
IMPACT OF PROPOSAL ON TRADE DRAW

	FORECAST TURNOVER 2008 (£000)	FORECAST TURNOVER 2016 (£000) NO NEW DEVELOPMENT	FORECAST TURNOVER 2016 (£000) WITH NORTHSTOWE	IMPACT 2016		FORECAST TURNOVER 2021 (£000) NO NEW DEVELOPMENT	FORECAST TURNOVER 2021 (£000) WITH NORTHSTOWE	IMPACT 2021	
				£000	%			£000	%
Cambridge	814,364	1,201,922	1,143,292	-58,630	-5	1,496,497	1,437,839	-58,658	-4
Peterborough	195,513	259,857	256,080	-3,777	-1	320,937	316,135	-4,802	-1
Bury St Edmunds	128,210	179,735	179,735	0	0	225,955	225,728	-226	0
Ely	81,940	115,319	107,002	-8,317	-7	139,921	129,621	-10,300	-7
Stevenage	92,622	127,063	127,063	0	0	158,554	158,554	0	0
Newmarket	78,237	113,640	104,051	-9,589	-8	145,499	133,065	-12,434	-9
Bedford	53,511	75,030	75,030	0	0	93,982	93,982	0	0
Huntingdon	116,993	156,982	133,372	-23,610	-15	192,165	163,521	-28,644	-15
Bishop Stortford	56,166	77,072	77,072	0	0	95,808	95,808	0	0
King's Lynn	43,742	61,031	61,031	0	0	76,860	76,860	0	0
Colchester	46,178	63,559	63,559	0	0	79,167	79,167	0	0
St Neots	57,571	78,860	78,076	-784	-1	97,227	96,324	-903	-1
Sudbury	53,393	73,532	73,532	0	0	91,654	91,654	0	0
St Ives	39,330	51,695	39,356	-12,339	-24	62,076	48,514	-13,562	-22
Chelmsford	22,943	31,738	31,738	0	0	39,481	39,481	0	0
Milton Keynes	15,909	22,330	22,330	0	0	27,863	27,863	0	0
Norwich	15,463	21,912	21,912	0	0	27,163	27,163	0	0
Other	908,091	1,278,634	1,268,263	-10,372	-1	1,600,867	1,589,717	-11,150	-1
TOTAL	2,820,175	3,989,911	3,862,493	-127,418		4,971,675	4,830,995	-140,680	