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1. INTRODUCTION

- 1.1 GVA Grimley was instructed by Cambridge City Council and South Cambridgeshire District Council in 2008 to carry out the Cambridge Sub Region and Northstowe Retail Study to inform retail planning in accordance with guidance set out in Planning Policy Statement 6 (PPS6): Planning for Town Centres.
- 1.2 This study provides robust and sound baseline evidence to inform the Council's Local Development Frameworks (LDF) and future Development Plan Documents (DPD) and is a tool for each Council to make informed choices about the nature and extent of retail growth to be accommodated in the future. In particular, it will play a key role in guiding the spatial vision and strategic objectives of the Core Strategy in each local authority in the context of significant population growth over the LDF period, including the new town of Northstowe and a number of urban extensions to Cambridge.
- 1.3 Based on our research, analysis and overall findings, the study identifies the performance of centres and the quantitative and qualitative need for new retail (comparison and convenience goods) floorspace up to 2011, 2016 and 2021. However, we advise that forecasts beyond a five-year period should be interpreted with caution. We therefore recommend that the assessments be monitored and updated to take account of changes in retail and property market trends, as well as revised spend and population growth projections.

Scope

- 1.4 The scope of the study, as set out in the client's Brief is to establish a sound evidence base for Local Development Framework retail strategies and policies and to establish whether retail proposals are of a size and mix which are appropriate to new centres, and their place in the retail hierarchy. We have undertaken a thorough audit of the current status of retail activities in the Cambridge sub region and provide detailed information on the likely future demand for such uses up to 2021. Our capacity assessment will specifically provide an estimate of the scale and nature of any changes in the future retail provision in the light of:
- Existing and forecast population levels;
 - Housing and regeneration growth;
 - Forecast changes in retail expenditure;
 - Forecast improvements in the productivity and efficiency of retail floorspace;
 - Changing forms of retail provision; and
 - Possible increases or decreases in the trade draw from competing centres.

Approach

- 1.5 Our approach draws on the emerging recommendations of our Good Practice Guidance for the Department of Communities and Local Government (DCLG) on how to assess the need for, and impact of key town centre uses. Of particular relevance to this study, we have recommended a transparent approach, where the key steps of the analysis, data inputs and assumptions are clearly set out and justified. In accordance with the Good Practice Guidance, our approach is also underpinned by the use of up to date household telephone interviews and in-centre surveys to help establish current shopping and leisure patterns, town centre catchments and market share estimates for both comparison and convenience goods retailing.
- 1.6 This Study also comprises a thorough overview of the existing retail network and retail hierarchy in each local authority including a detailed audit and qualitative healthcheck of Cambridge city centre. We also assess the relative vitality and viability of the three district centres and 22 local centres in Cambridge and the five rural centres in South Cambridgeshire, drawing where possible; on the key performance indicators set out in PPS6 (paragraph 4.4).

Report Structure

- 1.7 This report draws together the results of our research, incorporating the findings of the detailed survey-based technical analysis and healthcheck assessments. The report is structured as follows:-
- **Section 2** summarises the national, regional and local policy framework including the current retail hierarchy definitions, relevant to retail planning in the Cambridge sub region.
 - **Section 3** considers current retail trends and specifically the key socio-economic trends which are likely to influence the evolution of retailing in the Cambridge sub region.
 - **Section 4** reviews the sub regional context and in particular the influence of competing centres in the wider sub region, and potential changes in influence in the future.
 - **Section 5** presents our qualitative assessment of the role, attraction and performance of Cambridge city centre.
 - **Section 6** reviews other retail provision in Cambridge City and South Cambridgeshire, including large free standing convenience stores and retail warehousing.
 - **Section 7** assesses the vitality and viability of the district and local centres within Cambridge City.
 - **Section 8** provides a review of the health of the five rural centres in South Cambridgeshire.
 - **Section 9** looks at leisure provision across both local authorities focusing on commercial leisure facilities, including cinemas, ten-pin bowling, health and fitness and restaurants, cafés and the evening economy.

- **Section 10** sets out our baseline capacity projections for the sub region, focusing in particular on the capacity for further retail floorspace, with regard to identified commitments.
- **Section 11** develops the baseline capacity projections to examine the possible policy response. It tests the implications of alternative development scenarios.
- Finally **Section 12**, sets out our overall conclusions and recommendations.

2. POLICY CONTEXT

- 2.1 In this section, we examine the key points of relevance from national, regional and local planning policy.

National Policy Context

- 2.2 Government guidance makes clear that sustainable development is the core principle underpinning planning. Accordingly, PPS1 sets out a range of overarching policies aimed at facilitating sustainable patterns of urban and rural development through a number of initiatives, including the need to ensure that new developments provide good access to jobs and key services for all members of the community.
- 2.3 PPS6 reaffirms the Government's commitment to protecting/sustaining town centres. Accordingly, the central objective of the guidance is to promote the vitality and viability of town centres by planning for the growth of existing centres and enhancing them by promoting them as the focus for new development. Where growth cannot be accommodated in identified existing centres, local planning authorities should plan for extensions to the primary shopping area. It makes clear that where reversing the decline in centres is not possible, local authorities should consider reclassifying centres within their retail hierarchy.
- 2.4 In allocating sites and assessing proposed development, PPS6 requires local planning authorities to assess the need for the development; identify the appropriate scale, apply the sequential approach, assess the impact on existing centres; and ensure locations are accessible and well served by a choice of means of transport. After considering these factors, local planning authorities should consider the degree to which other considerations such as physical regeneration, employment, economic growth and social inclusion are relevant.
- 2.5 The creation of additional floorspace within buildings was brought under control in May 2006 following consultation on the ODPM's report 'Planning Control of Mezzanine and Other Internal Floorspace Additions' (March 2005). This was in response to concerns that the development of mezzanine floors in large retail stores significantly increased the available floorspace, thereby undermining the objectives of planning policy for the regeneration of town centres. The provision, incorporated within the 2004 Act does not seek to prevent such development, but to allow authorities to determine such proposals in the same way they would for external store expansion.
- 2.6 Changes to the Use Classes Order (UCO) took effect on 21st April 2005, enabling local authorities to have more control over managing town centre development while minimising the proliferation of pubs, takeaways and night-clubs. Cafes and restaurants have retained their A3 classification, pubs

and bars have been reclassified under a new Class A4, and takeaways have been reclassified under a new and separate Class A5. Night-clubs have been reclassified as Sui Generis.

Competition Committee: The supply of groceries in the UK market Investigation (April 2008)

- 2.7 On 30th April 2008, the Competition Commission published the final report on its proposals to remedy competition issues in the UK grocery market. The report recommends introducing a 'competition test' in planning decisions on proposed new grocery stores and extensions which will favour new entrants and grocery retailers over those which already possess a portion of the local market share. The Office of Fair Trading (OFT) will also be incorporated as a statutory consultee on all applications for grocery retail stores proposing a net sales area in excess of 1,000 sqm and retailers will be required to notify the OFT of any acquisitions of grocery stores with a net sales area greater than 1,000 sqm.
- 2.8 The report also identifies and releases thirty restrictive covenants being used by retailers to restrict entry by competitors and prohibits future imposition of such covenants. Grocery retailers will also be required to relinquish control over land sites in highly-concentrated markets that have been identified as inhibiting entry by competing retailers. Finally, the report recommends the establishment of an independent ombudsman to oversee and enforce a tightened Supermarkets Code of Practice to ensure compliance of the new regulations.
- 2.9 The Competition Commission does not make any recommendations for other changes to the planning system such as to the 'need' test or 'town centre first' policy. It also does not require any divestments of stores or land holdings. It believes that the recommended measures will be sufficient and proportionate in addressing its concerns about existing and future competition in local markets.

Regional Policy Context

East of England Plan Regional Spatial Strategy (May 2008)

- 2.10 Regional policy is set out in the East of England Plan Regional Spatial Strategy. The RSS was submitted to the Secretary of State in June 2006 and the Government's Proposed Changes were published for consultation between December 2006 and March 2007. Further Proposed Changes were subsequently published in October 2007 followed by an extended consultation period. The plan was formally adopted on 12th May 2008.
- 2.11 The plan describes the polycentric nature of centres in the region, which predominantly comprise small and medium sized towns surrounded by a rural hinterland. The spatial strategy focuses development on a group of urban areas, termed 'key centres for development and change'. These centres are viewed as providing the region's key focal points for multi/inter-modal transport, retailing

and other commercial activities, administration and tourism. The plan identifies Cambridge as a key centre for development and change.

- 2.12 The RSS notes the importance of thriving, vibrant and attractive centres as fundamental to sustainable development and encourages local development documents to define the role of centres and include a strategy to manage change and promote a healthy mix of uses.
- 2.13 Cambridge is identified as a regional centre in the retail hierarchy (Policy E5) and is the focus for major new retail developments and complementary town centre uses. Below this level of centres, the RSS states that local development documents will identify a network of local, district, neighbourhood and village centres.
- 2.14 The RSS adopts a more specific sub area policy approach to address matters which cannot be resolved at the local level. The plan defines four areas: the Cambridge Sub Region, Essex Thames Gateway, Haven Gateway and the London Arc. The Cambridge Sub region comprises Cambridge and the surrounding area as far as and including the ring of market towns of Chatteris, Ely, Haverhill, Huntingdon, Newmarket, Royston, St Neots, St Ives and Saffron Walden.
- 2.15 The vision for the Cambridge Sub Region is to protect and enhance the historic character and setting of Cambridge, together with the character and setting of the market towns and other settlements in the sub area. The sub regional strategy sets out a sequential approach to new development which focuses preferred development on land: in the built-up area of Cambridge; on the periphery of the built-up area of Cambridge; at the new settlement of Northstowe; and within or on the periphery of the sub region's market towns and within or on the periphery of key service centres.

Cambridge and Peterborough Structure Plan (Adopted October 2003)

- 2.16 As a result of the 2004 Planning and Compulsory Purchase Act, a number of Structure Plan policies have been saved. Policies of relevance to this study include those which seek to develop the Cambridge sub region as a centre of excellence and world leader in the fields of higher education and research. Saved policies also support the expansion of the knowledge-based economy outwards from Cambridge, whilst recognising the need to protect and enhance the setting of Cambridge as a compact city and the character and setting of the market towns.

Local Policy Context

Cambridge City Council Local Plan (Adopted July 2006)

- 2.17 The Local Plan supports policies to ensure Cambridge is a vibrant and thriving centre which offers a range of leisure, tourism and shopping facilities to meet the needs of residents in the city and wider sub region. Cambridge city centre is identified as a sub regional shopping centre and sits at the top of the retail hierarchy. The plan divides the city centre into two distinct areas: the historic centre and

the Fitzroy-Burleigh area (which includes the Grafton Centre), but also recognises the daily market on Market Hill, as an essential contributor to the range and choice of shopping within the city centre. Further down the hierarchy, the plan defines three district centres at Mitcham's Corner, Mill Road East and Mill Road West, and 22 local centres.

- 2.18 The 2001 Retail Study undertaken by Hillier Parker considered the need for additional retail floorspace in the city centre and concluded that there was no further need for major retail development in the city centre up until 2016, taking into account the Grand Arcade and Grafton Centre Phase 3 schemes. As a result, the Local Plan does not allocate any sites solely for retail development. The plan identifies some scope for small scale additions to retail floorspace and encourages the redevelopment or reorganisation of existing shops to improve the overall attractiveness of the centre and to cater for changing demand or requirements of shoppers.
- 2.19 The Local Plan promotes district and local centres and recognises the need for additional small-scale shopping provision to support the needs of residents in proposed urban extensions. Policy identifies six areas of major change which include:
- East Cambridge;
 - Southern Fringe
 - Northern Fringe
 - Madingley Road / Huntingdon Road
 - Huntingdon Road / Histon Road
 - Station Area
- 2.20 More detailed guidance relating to each area incorporates some retail as a principle land use to be provided at East Cambridge, Northern Fringe, Madingley Road / Huntingdon Road and the Station Area. It is not stated whether additional retail provision will feature as part of the Southern Fringe or Huntingdon Road / Histon Road urban extensions.
- 2.21 The Local Plan acknowledges that there is an over supply of out of centre retail warehousing and adopts a restrictive approach to additional new provision. The plan allows for the modernisation and replacement of existing out of centre warehouses where proposals do not result in additional retail floorspace.

Cambridge Development Strategy – Issues and Options Report (June 2007)

- 2.22 Following consultation on the Issues and Options Report for the Cambridge Development Strategy, the Council is preparing Preferred Options for consultation in September/October 2008.
- 2.23 The Issues and Options report considers the position of Cambridge City and seeks to identify a suitable vision and appropriate planning strategy to guide future development. The spatial strategy

seeks to develop Cambridge as a highly accessible, multi-centred city. The plan proposes enhancements to the historic City Centre and surrounding central areas for civic activities, the two universities, shopping, leisure and residential communities. Emphasis is also placed on the need to facilitate pedestrian movement through the city and overall accessibility.

- 2.24 The strategy acknowledges the potential for further growth at four peripheral mixed use centres on the city edge to the north, south, west and east, which should be a focus for future employment and residential expansion. To the south, residential development will take place to the east and south of Trumpington, in conjunction with the expansion of Addenbrooke's Hospital. To the west/north west of Cambridge, growth needs of the University of Cambridge will be accommodated between Madingley Road and Huntingdon Road. Land is also identified for a new residential community between Huntingdon Road and Histon Road. To the east, Cambridge airport and land to the north of Newmarket Road will be developed as a distinctive mixed use community. The Station Area is also identified for regeneration, as a mixed use City district, around the transport interchange.
- 2.25 In terms of retail, the document looks at the need to ensure the continued vitality and viability of the city centre; the need for additional food and non-food retail floorspace; the importance of maintaining and improving local and district shopping centres and ensuring there is appropriate provision in new urban extensions.

Cambridge East Area Action Plan (adopted February 08)

- 2.26 The AAP has been prepared jointly by Cambridge City and South Cambridgeshire District Councils' and identifies a 250 hectare site to accommodate a sustainable new urban quarter of approximately 10,000 - 12,000 dwellings. The plan sets out broad policies to guide development.
- 2.27 It is acknowledged that the population of the new centre will need to be served by a new large district centre and up to six local centres, which should be the focus of services, facilities and employment. The district centre should complement and not compete with the city centre but will need a good range of shopping and other services and facilities, including restaurants, cafés, pubs and bars, a library, cinema and health centre amongst other uses.
- 2.28 Objectives for the local centres include the need to locate such centres around Cambridge East's network of schools and on the dedicated local busway. The need to ensure that all residents of Cambridge East are within 400m (5 minutes) walk of a local/district centre or a public transport link to a centre; that local centres provide for the day-to-day convenience and service needs of local residents and act as a focus for small-scale employment provision.

South Cambridgeshire District Local Plan (adopted February 2004)

- 2.29 The South Cambridgeshire Local Plan has largely been replaced by the Council's Local Development Framework. With the adoption of the Core Strategy DPD in January 2007 and the Development Control Policies DPD in July 2007, most of the policies in the Local Plan have been superseded and there are no saved policies which are relevant to this study.

South Cambridgeshire Core Strategy DPD (adopted January 2007)

- 2.30 The Core Strategy sets out the overall approach to development in South Cambridgeshire. It focuses on locating new development in the most sustainable locations and seeks to address the current imbalance between jobs and houses.
- 2.31 The vision is for South Cambridgeshire to satisfy the development needs of the Cambridge sub region rather than those generated by pressures elsewhere, while preserving and enhancing its rich built and natural heritage and distinctive character. One of the key objectives is to locate development where access to day-to-day needs for employment, shopping, education, recreation, and other services is available by public transport, walking and cycling.
- 2.32 The Core Strategy also stresses the need to protect the varied character of the villages of South Cambridgeshire by ensuring that the scale and location of development in each village is in keeping with its size, character and function and that the buildings and open spaces which create their character, are maintained and enhanced.
- 2.33 Policy ST/9 sets out the retail hierarchy and states that any proposals for new retail development should be consistent with the position of the centre in the hierarchy.
- Northstowe Town Centre (not intended to fulfil a sub regional shopping role).
 - Cambridge East District Centre.
 - Rural Centres (appropriate location for shopping facilities to serve their local catchments only - Cambourne, Fulbourn, Great Shelford & Stapleford, Histon & Impington and Sawston).
 - Other Villages (Minor rural centres, group villages and infill villages).

South Cambridgeshire Development Control Policies DPD (adopted July 2007)

- 2.34 There are a number of policies in the DPD which relate to retailing. POLICY SF/1 seeks to protect Village Services and Facilities and states that planning permission will be refused for proposals which result in the loss of a village service, including village pubs, shops, post offices, community

meeting places or health centres, where such loss would cause an unacceptable reduction in the level of community or service provision in the locality.

- 2.35 Policy SF/2 sets out the Council's requirements for new retail development which is concurrent with the advice in PPS6. Specific policy advice is given for the District's villages and Policy SF/4 states that proposals for retailing in villages will only be permitted where the size and attraction of the development is of a scale appropriate to the function and size of the village.
- 2.36 Where retail development is proposed on land allocated for other uses, Policy SF/3 states that retail will only be permitted where it can be demonstrated that the effect of a loss of another uses, would not limit the range and quality of sites available for that particular uses or the quantity of land required to meet requirements for housing and employment.
- 2.37 Policy SF/5 (Retailing in the Countryside) states that planning permission for the sale of goods in the countryside will not be granted except for:-
- Sales from farms and nurseries of produce and/or craft goods, where the majority of goods are produced on the farm or in the locality; or
 - Exceptionally, the sale of convenience goods, ancillary to other uses, where proposals, either individually or cumulatively, do not have a significant adverse impact on the viability of surrounding village shops, or the vitality of rural centres or other village centres.

Northstowe Area Action Plan DPD (adopted July 2007)

- 2.38 The Area Action Plan identifies Northstowe as a sustainable new town with a target size of 10,000 dwellings and associated development. The AAP establishes an overall vision for the new town including its relationship with surrounding villages and its countryside setting, and states that "Northstowe will be a sustainable and vibrant new community that is inclusive and diverse with its own distinctive local identity which is founded on best practice urban design principles, drawing on the traditions of fen-edge market towns, which encourages the high quality traditions and innovation that are characteristic of the Cambridge Sub Region".
- 2.39 The AAP sets out detailed policies for Northstowe town centre. Key objectives are to:-
- Provide a vibrant and diverse town centre which is accessible to all by public transport;
 - Provide shops, services, cultural, leisure and community facilities to serve the needs of Northstowe and the immediately surrounding area, whilst not undermining the vitality and viability of the nearby market towns and Cambridge city centre, although it is noted that it is inevitable that some changes will occur, but these should be identified in advance and managed appropriately;

- Provide a town centre with a large number and range of comparison and convenience shops and other units and spaces which will create an attractive urban environment;
 - Ensure that no single store sells a range of comparison and convenience goods that it would threaten the development of the remainder of the town centre;
 - Create a high quality and varied built and open space environment where people will wish to shop and find their services and facilities, both day and evening;
 - Provide access to the wider road network for visitors to the town centre and car parking of a scale appropriate to a modest sized town with a limited catchment area; and
 - Secure an early start to the development of the town centre to help create an identity for Northstowe at the earliest opportunity.
- 2.40 The AAP also envisages that local centres, catering for day-to-day convenience and service needs will be provided to ensure that all residents are within a reasonable walking distance of local shops and services.
- 2.41 A revised outline planning application was submitted to South Cambridgeshire District Council by developers Gallagher Longstanton Ltd and English Partnerships in December 2007. The application is currently under consideration.

Summary

- 2.42 National planning policy guidance provides the framework for retail policies in the Cambridge sub region. The overarching thrust of national policy is to sustain and enhance the vitality and viability of existing centres, and wherever possible to plan positively for change.
- 2.43 The East of England RSS recognises the dominance of Cambridge but also the network of outlying small and medium market towns in the rural hinterland. The importance of protecting the character of Cambridge city and the market towns is noted.
- 2.44 Both Cambridge City and South Cambridgeshire have started work on their Local Development Frameworks. South Cambridgeshire is at a more advanced stage and new Development Plan Documents have to a large extent superseded the Local Plan.
- 2.45 The Cambridge City Local Plan highlights the retail, leisure, tourist and cultural role of Cambridge city centre and notes the different characters of the historic core and the Grafton Centre and the need to ensure that these areas are well linked. It also highlights the importance of enhancing the district and local centres.
- 2.46 The South Cambridgeshire Local Development Framework notes that the proposed new settlement of Northstowe will reside at the top of their retail hierarchy, above the existing rural centres and

villages. The need to protect the character of the rural centres and villages is recognised, as is the need to ensure that the development is of an appropriate scale and protects against the loss of rural services.

- 2.47 Both Cambridge City and South Cambridgeshire recognise the importance of ensuring that new residential developments are well served by local services of an appropriate scale and are provided at the appropriate phase of development. Further guidance is provided in two adopted Area Action Plans for new settlements at Cambridge East and Northstowe.

3. RETAIL AND LEISURE TRENDS

- 3.1 To put our assessment of the quality of existing provision and the need for additional floorspace into context, it is relevant to consider the wider economic and social trends likely to influence retailing in the Cambridge sub region. A number of trends are likely to have a bearing on the future pattern of retail provision in the sub region, and the opportunities arising from development proposals. This section examines key trends and drivers for change in the retail industry. We outline the key national trends in retailing and service provision of particular relevance to the Cambridge sub region drawing from a range of published data sources, including research by Verdict Analysis, Mintel and the New Economics Foundation.

Demographics

- 3.2 Over the last 15 years UK population has increased at a rate of c.0.4% pa, whilst the number of households has increased by 0.5% pa, as average household size has decreased to 2.34 in 2006, with smaller families, more divorces, people living longer etc. The population is also ageing. These trends are forecast to continue and will affect spending habits – how much we spend, on what and where.
- 3.3 Over the next 20 years the 65 and over age group is expected to grow by 4.5m or 47% and the under 65s age group by only 8%. Older shoppers have a younger mindset than in the past, are more fashion aware and financially better off as a result of house price growth as well as income growth (but post retirement income from pensions could be a concern if they do not achieve anticipated values). They will have more time to shop, will spend more on DIY and gardening and will expect good customer service. Younger shoppers will have higher education fees to pay, will experience higher housing costs, will be more computer literate and spend more on-line, and will spend more on entertainment/leisure so they may have less to spend in the retail property sector.

Income and Expenditure

- 3.4 Incomes and expenditure have shown strong growth over the last 20 years, with retail expenditure growing faster than incomes. At the same time working hours for many, but by no means all employees have lengthened leading to a cash rich, time poor consumer. Overall retail expenditure has increased by about 3.9% pa in real terms over the last 20 years, with most of this growth on comparison goods rather than convenience goods, where growth has been less than 1% pa. Comparison goods growth has been close to 5.3% pa over the last 30 years, over 6% pa over the last 20 years and even stronger over the last 10 years. These strong trends are not expected to continue in the foreseeable future due to current high levels of consumer debt, an already low

savings ratio and a weaker housing market. Over the next 5-10 years the latest economic forecasts suggest that comparison goods expenditure growth will be about 3.8-4.8% pa.

- 3.5 With longer working hours for many, shop opening hours in the larger centres have been extended and Sunday is now one of the strongest trading days in the week. This has implications for where retail expenditure is concentrated and the nature of some shopping trips which are considered to be a quasi leisure experience. Longer working hours, plus increasing take-up of the Internet and broadband technology, have led to a large growth in non-store shopping, albeit from a small base.
- 3.6 Non-store retail sales, excluding e-tailing, are expected to decline over the next ten years, but this will be more than offset by the growth of e-tailing, resulting in overall growth in non-store sales in absolute and percentage terms. Total non-store convenience retail sales (including e-tailing) are expected to increase from 2.5% of sales in 2004 to 7.3% in 2013, and then stabilise, whilst total comparison non-store retail sales are expected to increase from 7.1% in 2004 to around 14.5% in 2013, before stabilising. Strong growth is expected to continue until 2009 and thereafter the growth rate is expected to slow. However, due to the uncertainty about the growth of e-tailing, Experian Business Strategies suggest that a plausible "Low Case" forecast market share for Non-Store Retail Sales in 2016 would be 6% for convenience goods (rather than 7.3% as above) and 13% for comparison goods (rather than 14.5% as above).
- 3.7 The impact of growth in e-retailing on future demands for retail floorspace is an important consideration and factors such as the processing of online grocery orders by retailers such as Tesco in local stores, and the potential use of shops as showrooms and/or collection points may mean that the growth in Internet sales will not necessarily lead to an equivalent reduction in floorspace requirements.
- 3.8 The recent credit crunch has had massive impacts on the retail sector. It is estimated that 1.4 million homeowners will need to remortgage over the next year. A study by the insurance company AXA found that three in four families with an income of more than £30,000 were planning to curb spending this year as household budgets become increasingly stretched. According to Verdict, as customers become more concerned about the economic outlook, they are becoming more selective in their purchasing habits. With rising living costs, disposable incomes are being squeezed, and as a result customers are shopping around more to find the best possible value, and also cutting back on 'big ticket' purchases. Increasingly retailers are finding it harder to please customers, and across all sectors, retailers are converting fewer customers into main users and shoppers are less loyal to their main stores.

Sales Density Increases

- 3.9 Although hard quantitative evidence is limited, comparison businesses in particular have over time increased sales densities by achieving improvements in productivity in the use of floorspace. PPS6 (paragraph 2.34) requires that quantitative need/capacity assessments have regard to a realistic

assessment of such improvement. Analysis of past data is difficult as over the last 20 years sales densities increases have been affected by changes in the use of retail floorspace, with higher value space-efficient electrical goods replacing lower value space intensive goods, the growth in out-of-centre retailing, a number of one-off events like Sunday Trading and longer opening hours, and the very strong growth of retail expenditure relative to the growth in floorspace. In the future growth rates of 1.5-2.5% pa seem likely to be achieved for comparison goods, with much lower growth in sales densities for convenience goods. The future growth in sales densities will undoubtedly be affected by the way in which retail space evolves and is used in the future.

Employment

- 3.10 Over the last 20 years retail expenditure has increased at about 4% pa, but retail employment has increased much more slowly. Total employees in retail employment have increased from 2.2 million to 3.0 million, an increase of 1.5% pa. However, this growth has been in part time employees. Full time equivalent (FTE) employment has hardly increased at all, from about 2.1 million to 2.2 million, a 0.4% pa increase. Over the next 15 years Experian Business Strategies expect a marginal increase in FTE employment in the sector with a slightly higher increase in part time employment.

Location

- 3.11 Strong income and expenditure growth has affected retailing in another important way – the rise in car ownership and mobility. In 1961 only 30% of households had a car (one or more cars) and only 2% had more than one car. With public transport (and walking and cycling) the dominant mode of transport, shopping choices were limited and distances travelled were short. By 1970 car ownership had increased significantly so that nearly 50% of households had one or more cars and the number of households with two or more cars had quadrupled but was still under 10%. Currently about 77% of households have one or more cars and a third of households have two or more cars, a huge increase in mobility over the last 30-40 years. Households are now much more mobile than they were and therefore their choices of where to shop and the distances they can travel are much greater. These trends will continue but the rate of change may well diminish as a result of rising travel costs and consumer debts.
- 3.12 Increased mobility and affluence has favoured larger centres over smaller centres. As a result larger centres have increased in size and importance relative to smaller centres which has further reinforced the attraction of larger centres to more mobile shoppers. Smaller centres have, therefore, lost market share and have seen much less new development than the overall rate of expenditure growth would imply. This is recognised by PPS6, which urges local authorities to be pro-active in trying to encourage development in smaller centres.
- 3.13 Increased mobility and affluence has also stimulated out-of-centre development, which has grown much more rapidly than town centre development. Over the last 20 years the majority of retail development has been in edge or out-of-centre locations. This has led to increasingly restrictive

planning policy in favour of town centres over the last 10 years, but only recently has the growth in out-of-centre development started to slow. This slow down is expected to continue, but Verdict still expect sales at out-of-centre locations to increase at a faster rate than at in-centre locations.

- 3.14 PPS6 reinforces the Government's town centre first objectives. The sequential site test is still a cornerstone of retail planning policy, favouring town centre sites and necessitating consideration of the disaggregation of retail park proposals so that smaller sites are considered. However, it is also recognised that individual retailers' business models are also relevant. Disaggregation of a retailer's proposed store does not now need to be considered if the operator can demonstrate it would adversely affect their business model.
- 3.15 In May 2006 the Office of Fair Trading (OFT) referred the supply of groceries by retailers in the UK to the Competition Commission (CC) for investigation under Section 131 of the Enterprise Act 2002. The CC's published its findings in April 2008 and reported that *"in many respects, competition in the UK groceries industry is effective and delivers good outcomes for consumers, but not all is well"*. The two main areas of concern highlighted were:-
- (1) *that a number of grocery retailers have strong positions in several local markets. Barriers faced by competing retailers that could otherwise enter these markets mean that consumers get a poorer retail offer than would otherwise be the case, while those grocery retailers with strong local market positions earn additional profits due to weak competition in those markets, and*
 - (2) *the transfer of risk and unexpected costs by grocery retailers to their suppliers through various supply chain practices if unchecked will have an adverse effect on investment and innovation on the supply chain and therefore, on consumers.*
- 3.16 A number of steps to address the problems were posed including the recommendation of the introduction of a competition test as part of the planning process for new stores, to favour new retailers other than those which already have significant market shares in an area. Planning for consumer choice and the promotion of competition have been included within the Proposed Changes to PPS6 Planning for Town Centres, consultation document, with final recommendations expected in Spring 2009. Recommendations were also made by the Competition Commission to try and prevent retailers using the control of land sites in highly concentrated markets as a means of inhibiting entry by competing retailers. These steps would have implications on the potential new locations that some retailers could look to develop within.

Size of Units

- 3.17 The growth of multiple traders and increased competition between companies has meant that the retail structure is increasingly dominated by large companies requiring larger shop units. Shopping centres and out-of-centre development that has been able to accommodate this demand for larger sized units (typically 500-2,000 sqm or larger) have grown in importance, reinforcing the trend of

higher order centres and out-of-centre retailing growing in relative importance (i.e. polarisation in the retail hierarchy).

- 3.18 The growth in the size of stores has caused a contraction in the number of shop units and consumer choice. This is particularly evident in the food sector, with a marked decline in the number of smaller and more specialist food retailers (greengrocers, butchers, fishmongers, bakers etc), and a large increase of superstores. This is indicated by Verdict Research which shows a 31% reduction in the total number of convenience stores over the last 10 years, as space is concentrated into larger stores. Whilst the number of superstores (>25,000 sq ft) has increased by 37%, food specialists and off licences/tobacconists have declined by 35% and 57% respectively. These trends may well weaken in the future due to possible market saturation of large foodstores and concerns over lack of competition due to the market dominance of a few key multiples.

Foodstores

- 3.19 A by product of the restriction of new development of large foodstores is the growth in applications to extend existing stores and the changing composition of floorspace within existing foodstores. There is an increasing emphasis on the sale of comparison goods at the expense of convenience goods, as expenditure growth rates for comparison goods are much higher than for convenience goods and margins are greater, although sales densities are often lower. This trend poses an increasing threat to smaller centres, as larger foodstores will increasingly sell a wider product range of day-to-day convenience and comparison goods and services. According to Verdict, non-food floorspace in the larger format stores of the top 4 grocers now accounts for between 28% (Morrisons) and 50% (Asda) of sales floorspace.

Shopping and Leisure

- 3.20 Due to increased affluence and mobility, and the rise of the internet, shoppers no longer merely shop to satisfy 'needs', they increasingly shop to satisfy 'wants' as well. Retailing in the higher order centres and the more attractive smaller centres is changing and arguably becoming more of a quasi leisure experience. Leisure spending growth is continuing to outstrip that of retail, and despite the economic slowdown, at the moment consumers seem to be willing to continue spending on leisure.
- 3.21 Quality restaurants, coffee shops, cafes and bars, as well as health and fitness centres and multiplexes in larger centres, are therefore important to attract shoppers and encourage longer stays and higher spending. Better integration of retail and leisure facilities mutually benefits both sectors. Pedestrianised streets and covered retail areas are also important in attracting shoppers, as is the overall attractiveness of the town centre, along with good accessibility and car parking.
- 3.22 A number of factors have helped drive the growth of leisure provision in town centres. Planning policy is important as is the fact that urban living is fashionable. Town centres can offer consumers a much more vibrant atmosphere in which to eat and drink and they also offer a much wider choice of

leisure venues, allowing more spontaneous decisions. For bars, restaurants and health & fitness clubs, the attraction of the town centre is 'daytime trade' and the ability to capitalise on proximity to businesses and shoppers.

Internet Shopping/E-tailing

- 3.23 Online spending is growing at its fastest rate for six years, driven by convenience and low prices, and so far e-retailing is showing no signs of being affected by the recent economic downturn. According to Verdict (2008), the e-retail market grew by 35% between 2006 and 2007, which is considerably higher than the 3.6% growth in the total retail market, and e-retail is expected to continue outperforming the total retail sector over the next five years.
- 3.24 Worth £14.7bn in 2007, the online market is becoming an increasingly important contributor to retail, accounting for 5.2% of all retail sales, (up from 3.8% in 2006). Verdict's research found that almost 66% of UK households now have access to the Internet, with 55.5% having broadband access, which is making online shopping easier, faster and more reliable. As technology continues to improve, it will fuel further growth in the market. Overall the internet shopper population is forecast to grow by c.50% between 2007 and 2012.
- 3.25 The online market is dominated by the electrical and food & grocery sub-sectors, which between them account for around half of all sales. The food & grocery sub-sector, with rapid growth of 39.5% in 2007 is expected to overtake electricals in the top spot. Online clothing and footwear sales grew 38% during 2007, and with sales of £1.7bn, clothing & footwear is the UK's third largest online market. Although only accounting for a very small share of online spending, the market which saw the most dramatic online growth in 2007 was furniture and floor coverings, growing by 41% from £0.4bn to £0.7bn, despite the slowdown in the sector overall, with Ikea's launch of a transactional website being sited as one of the drivers of growth. The music & video sector continues to have the overall highest online market penetration at 30.8% of total sector sales, and this is forecast to double by 2012, which could have implications for physical store requirements.
- 3.26 As a consequence of this growth, there are huge pressures on retailers as the Internet has provided an attractive alternative for many consumers. Shoppers are selecting their own retail mix online and shopping centres need to compete with this choice, which is not only driven by price and range, but also service and expertise. Town centres will increasingly have to provide a retail experience that the Internet and supermarkets are unable to match, and the market will respond in some way to the varying impacts on different retail sectors. In accordance with PPS6, the emphasis should be on the overall town centre experience, the mix of uses, and not just the retail offer.

Tourism

- 3.27 Tourism is one of the largest industries in the UK. In 2006 expenditure for both inbound and domestic tourism reached approximately £84 billion. Over 2 million jobs are sustained by tourism activity in the

UK, either directly or indirectly, and there are around 1.45 million jobs directly related to tourism activity (5% of all people in employment in the UK). According to UKTS, UK residents took 123.5 million trips in 2007 and spent over £21 billion. This represents a 2% decrease in trips on 2003 and a 1% decline in expenditure over the same period. However, overseas visits to the UK are increasing, with a 29% increase between 2000 and 2007 and an increase in spending of 25%.

3.28 Some of the key factors influencing tourism trends are:

- Growing disposable incomes, increased overseas travel supplemented by short breaks in Europe and the UK;
- Increasing expectations of product quality;
- An ageing population with more flexibility for off-peak travel;
- Changing consumer behaviour with more frequent short breaks and special interest holidays;
- Decreasing interest in traditional UK seaside holidays with more interest in urban destinations;
- Growing environmental concerns leading to more interest in walking, cycling, wildlife and remoter locations;
- Use of Internet to research, plan and make bookings direct with businesses at the destination; and
- A more volatile global environment, which can increase the attractiveness of UK domestic products but also lead to increased competition for our core markets.

3.29 National visitor trends in 2006 reported that the 1,875 visitor attractions in England showed an increase in attendance of 3% between 2005 and 2006. The majority of categories showed growth in 2006, with a particularly strong increase in visits to museums and art galleries (+8%), which represent a third of all attractions. Outdoor attractions recorded strong increases in 2005, driven by the fine weather. However, despite the relatively wetter 2006, many of these categories managed to maintain visits.

Summary

3.30 National retail trends indicate a continued growth in incomes and expenditure, albeit not at such strong levels as in the last 15-20 years. The growth in expenditure is focused on comparison goods with a much smaller increase in convenience goods expenditure.

3.31 Increased car ownership has resulted in greater household mobility and therefore the choices for shopping centres to visit and the distances that can be travelled are much greater. Internet shopping has grown phenomenally in the last few years, albeit from a low base, and looks set to continue in certain sectors.

- 3.32 The foodstore operators have continued to evolve their formats and offer. With restrictions on out-of-centre stores growing, and changing socio-economic trends, several large operators have returned to the High Street with small convenience stores. Operators are also seeking to extend their comparison goods offer, turning stores into variety or mini department stores. This trend in out-of-centre locations could pose a threat to smaller centres, where the large out-of-centre stores become one stop shopping destinations negating trips to town centres.
- 3.33 There has been a continued polarisation towards larger centres and the provision of larger stores in these larger centres. Where smaller centres have been unable to diversify their offer or create niche markets they have suffered. The focus on urban renewal has increased demand for town centre sites for a wider range of land uses.

4. SUB REGIONAL CONTEXT

- 4.1 This section compares the role of Cambridge with centres in the wider region. In particular, it analyses the influence of key competing centres on the current and future role of Cambridge. Our analysis draws on the household telephone survey results and other data sources including PROMIS, Javelin Retail Ranking, Focus Property Intelligence Database and EGi to identify the main retail offers and floorspace provision and the extent to which this is likely to change and influence shopping patterns in the region.
- 4.2 The household telephone survey highlights the main centres that compete with Cambridge and include; Peterborough, Bury St Edmunds, Huntingdon, Stevenage, Ely and Newmarket. The location of each centre in relation to Cambridge is illustrated on Plan 1, and the extent of the household telephone survey area on Plan 2.
- 4.3 Shopping patterns derived from the household telephone survey enable us to calculate the amount of comparison goods expenditure that each competing centre draws from the defined Cambridge sub region survey area. As well as the strength of the retail offer this indicator takes into consideration accessibility and distance from the Cambridge catchment area. The total expenditure leaking to these centres is highlighted in Table 4.1 and illustrated on Plan 3.

Table 4.1: Study Area Comparison Goods Expenditure Flow to Key Competing Centres

Centre	Comparison Goods Expenditure (£000)	% Total Available Comparison Goods Expenditure
CAMBRIDGE	814,364	28.9
Peterborough	195,513	6.9
Bury St Edmunds	128,210	4.5
Huntingdon	116,993	4.1
Stevenage	92,622	3.3
Ely	81,940	2.9
Newmarket	78,237	2.8

Source: GVA Household Telephone Survey, April 2008

- 4.4 It is evident that Cambridge draws approximately £814m of comparison goods expenditure (28.9%) from within the survey area which is significantly greater than all other competing centres. The next closest competing centre is Peterborough which draws approximately £196m, representing just 6.9% of the total comparison goods expenditure. Other centres are less influential still, Bury St Edmunds and Huntingdon drawing 4.5% and 4.1% respectively, Stevenage has a draw of 3.3% and Ely and Newmarket both draw less than 3% of available expenditure from the Cambridge survey area.
- 4.5 Plans 4 to 10 illustrate the comparison goods trade drawn to Cambridge and the identified competing centres from each zone defined by the household telephone survey area. Plan 4 shows the dominance of Cambridge. It is evident that Peterborough restricts the Cambridge catchment to the

north-west and Bury St Edmunds to the east. The influence of Stevenage, to the south, is less strong. Huntingdon, Ely and Newmarket are all within the Cambridge catchment.

- 4.6 Retail Studies have been carried out for Huntingdonshire, East Cambridgeshire and Fenland (mainly beyond the Cambridge survey area). A summary of these is provided in Appendix 1e. Whilst these studies highlight some comparison goods capacity in the market towns, the scale is fairly modest and there is a lack of development opportunities. As such we consider it unlikely that the trade draw of Huntingdon or Ely would increase significantly in the future. This is explored in more detail below. Further details on the competing centres are set out in Appendix 1.

Profile of Competing Centres

Peterborough

- 4.7 Peterborough is situated approximately 63km to the north west of Cambridge. The centre is designated as a Major Regional Centre in the East of England Plan. Peterborough is a relatively compact centre with a total retail floorspace of 131,000 sqm gross. Approximately 54% of this is concentrated within three shopping centres, with the remainder distributed along the surrounding pedestrianised streets.
- 4.8 The largest of the three shopping centres is the centrally located Queensgate Centre which originally opened in 1982 and comprises c.74,785 sqm gross floorspace across two floors. The centre is anchored by a three-floor John Lewis department store. There is also a large Marks & Spencer, Bhs and Argos Extra as well as key multiple high-street retailers H&M, Top-Shop, River Island, Boots and Superdrug. The centre has good links to the surrounding shopping streets where there is a second Marks & Spencer and representation by a range of multiple retailers including New Look and Woolworths as well as high street banks, restaurants and drinking establishments.
- 4.9 The remaining two shopping centres are less prominently located. The Hereward Cross Centre, previously a 1960s arcade which was remodelled in 2006 is situated to the north of the central shopping area and away from the pedestrianised zones. The centre comprises c.7,896 sqm gross floorspace over 14 units. There are two substantially sized units occupied by Wilkinson and a Tesco Metro foodstore. The Rivergate Centre is situated towards the southern fringe of the town centre in a more secondary location. The centre comprises c.11,148 sqm gross floorspace within a mall of shop units, three of which are large units occupied by Comet, Iceland and George @ Asda. There is also a 5,760 sqm gross Asda foodstore which sits adjacent to the mall.
- 4.10 Current commitments include the redevelopment of the Asda, George and Iceland units at the Rivergate Centre which will create a new 10,219 sqm store Asda store (2,787 net additional retail floorspace). A planning application has also been submitted for a further extension to the Queensgate Centre proposing an additional 68,000 sqm retail floorspace incorporating a 15,050 sqm Marks & Spencer store, a second anchor store along with five flagship stores and 50 unit shops. To

the west of the Queensgate Centre there are also proposals for 10,219 sqm unit shops as part of the Station Quarter development at Peterborough train station.

- 4.11 Based on the above, the total additional retail floorspace proposed in Peterborough is c.81,006 sqm gross which would raise the existing floorspace from 131,000 sqm gross to 212,006 sqm gross which will exceed Cambridge's total retail floorspace. It is possible that such significant new development in Peterborough could attract some shoppers from the Cambridge catchment, particularly if the new schemes are easily accessible by car compared with the difficulties of accessing the historic centre of Cambridge by car.

Bury St Edmunds

- 4.12 Bury St Edmunds is located approximately 43km to the east of Cambridge along the A14. The centre is designated as a Major Town Centre in the East of England Plan. The centre caters for an extensive and largely affluent population and its retail offer reflects this. The layout of the centre is based on a medieval grid street pattern with the main shopping focus around Cornhill and surrounding streets, some of which benefit from pedestrianisation. The centre comprises a total 68,000 sqm gross retail floorspace.
- 4.13 Bury St Edmunds has one shopping centre, Cornhill Walk which opened in 1988 and comprises just 4,459 sqm gross across 9 retail units. The centre is anchored by two larger units occupied by Fopp Recordings and JJB Sports. Remaining units are occupied by a range high street multiple retailers including New Look, Evans, Principles and Vodafone amongst others.
- 4.14 The majority of the Bury St Edmunds' retail provision is distributed along the town's main high streets extending south from Cornhill Walk shopping centre. Other key multiple retailers represented in the centre include Woolworths, Boots, Argos, Next and Top Shop. There is also a three-floor Marks & Spencer store and an Iceland foodstore. The retail offer is supplemented by a range of food and drink establishments and service operators.
- 4.15 An extension to the town centre is currently underway, with the redevelopment of the Cattle Market which upon completion in 2009, will provide a 7,897 sqm Debenhams department store and 35 unit shops. The total additional retail floorspace created amounts to approximately 24,618 sqm. A number of proposed units have already been pre-let to Next, HMV, New Look and River Island. Additional developments in the pipeline include pre-planning proposals for a 6,503 sqm scheme at Station Hill/Tayfen Road incorporating retail warehousing, a foodstore and unit shops. We are also aware of proposals for three retail warehouse units at the Glasswells World of Furniture site on Newmarket Road which would create 2,787 sqm additional retail floorspace.
- 4.16 The above developments amounting to 33,908 sqm gross would increase the total floorspace in Bury St Edmunds to 101,908 sqm gross. This would remain well below the floorspace and retail offer in Cambridge. Bury St Edmunds is a popular centre with a strong draw from the eastern part of the

Cambridge catchment area. Its influence may increase in the future with the new cattle market scheme.

Huntingdon

- 4.17 Situated approximately 29km to the north west of Cambridge, the market town of Huntingdon comprises a linear centre contained within the B1514 ring road. The total retail floorspace in Huntingdon is 42,000 sqm gross arranged along the pedestrianised High Street and within three managed shopping centres.
- 4.18 The largest of Huntingdon's three shopping centres is the 11,148 sqm St Germain Walk which opened in 1999 and presently comprises seven units anchored by a 4,550 sqm Sainsbury's foodstore and a 1,860 sqm gross Wilkinson store. The remaining units are occupied by multiple retailers Peacocks, Gilesports, Superdrug, Millets and the Post Office.
- 4.19 A second shopping centre, Chequers Court sits adjacent to St Germain Walk. Chequer's Court originally opened in 1962 and most recently underwent an extension in 2007. The centre comprises a number of relatively small units which amount to a total floorspace of 5,945 sqm gross. Retailers in the centre include a mix of independent and multiple operators such as Clinton Cards, Julian Graves, Starbucks and Bakers Oven.
- 4.20 The third shopping centre in Huntingdon is St Benedict's Court situated to the south of High Street. The 6,596 sqm gross centre is anchored by a 1,530 sqm Waitrose foodstore and includes multiple retailers Mothercare, La Senza and H Samuel jewellers amongst others. Outside of the shopping centres, other multiple retailers with representation in Huntingdon include Woolworths, Argos, Boots, WH Smith, Next, Marks & Spencer and Bon Marche.
- 4.21 There are no published developments in the pipeline, however we are aware from discussions with local authorities in Cambridge that there may be a potential extension to the Chequers Court shopping centre. There is also potential opportunity for additional retail warehouse floorspace and or a new foodstore at a former industrial site north of George Street and to the west of St John's Street.
- 4.22 Huntingdon is likely to continue functioning on a medium sized market town, serving its immediate population. Possible developments coming forward are unlikely to significantly alter its influence in the Cambridge sub region in the future.

Stevenage

- 4.23 Stevenage is situated between J7 and J8 of the A1(M), approximately 45km south west of Cambridge. Stevenage has a classic New Town design with the town centre contained within the surrounding ring-road network. Stevenage is considered a Major Town Centre in the East of England Plan.

- 4.24 Stevenage has approximately 64,000 sqm retail floorspace, almost half of which is within one the town's three managed shopping centres. Queensway was the original shopping centre which opened in 1959. The centre is relatively dated and is occupied by national multiple including Woolworths, Boots and Superdrug. The Westgate Centre, situated to the north of Queensway, opened in 1988 and is occupied by retailers such as River Island, Dorothy Perkins, Burton and Bay Trading.
- 4.25 The Forum Shopping Park is the most recent of the three and was developed in two phases, in 1990 and 1997. The centre comprises a mix of unit sizes and retailers include TK Maxx, New Look, Bhs, Staples, HMV, Waterstones and Sports World. A 6,065 gross sqm Tesco Extra foodstore also forms part of the centre.
- 4.26 Stevenage Borough Council is currently pursuing a regeneration strategy for the town centre in partnership with developer's Stanhope and ING Real Estate. An outline planning application was submitted to the Council in November 2007 proposing approximately 18,580 sqm additional retail floorspace as part of a wider 28,520 sqm redevelopment scheme incorporating residential and leisure uses as well as new civic facilities and a replacement bus station.
- 4.27 Currently Stevenage exerts limited influence over the Cambridge catchment. Whilst there is significant new development in the pipeline it is unlikely to effect the Cambridge catchment in the future.

Ely

- 4.28 Ely is a market town situated within the East Cambridgeshire District, approximately 29km north of Cambridge along the A10. Ely is a relatively compact centre with the main shopping area focussed along High Street and Market Place and within the Cloisters Shopping Centre.
- 4.29 The Cloisters Shopping Centre opened in 1997 and presently comprises approximately 6,224 sqm across 20 unit shops. The centre is anchored by Waitrose (1,630 sqm) and Wilkinson (1,360 sqm) and includes representation by a number of key high street multiple retailers including Dorothy Perkins, Gilesports, Peacocks and Iceland amongst others.
- 4.30 Other key retailers represented in Ely include, Woolworths, Boots, WH Smith and Argos. The retail offer is supplemented by a range of food and drink establishments as well as service operators including a number of high street banks and building societies.
- 4.31 There are two retail development schemes in the pipeline for Ely including a planning application proposing a new DIY warehouse at Lisle Lane to the north east of the town centre. An application has also been submitted proposing a 1,525 sqm extension to the Tesco store at Angel Drove south of the town centre. Ely is a compact market town with a distinct catchment. Neither of the schemes coming forward is likely to have an effect on Cambridge.

Newmarket

- 4.32 Newmarket is the nearest competing centre, situated approximately 21km east of Cambridge in a position just south of the A14. The market town is orientated around a linear development and comprises approximately 36,000 sqm gross retail floorspace distributed along the main High Street and within the Guinness Centre /Rookery Shopping Centre which is north of the High Street.
- 4.33 The Shopping Centre comprises approximately 12,356 sqm gross across 45 retail units. Since its opening in 1972 it has been extended in 1990 and subsequently refurbished in 1991. The centre is anchored by a 930 sqm Marks & Spencer store and other units are occupied by a mix of independent and high street multiple retailers including Argos, Peacocks, Superdrug and Dorothy Perkins. In October 2007 full planning permission was granted (currently still subject to finalising a S106 agreement) for the redevelopment of the site to the west of the Marks & Spencer store. The proposals involve the erection of a two storey retail development including six 21 sqm kiosks and a 1,486 sqm retail unit.
- 4.34 Elsewhere in the town centre retail units front the main High Street offering a mix of retail and service operators including Woolworths, TK Maxx and a Palmers department store. Aside from the proposed extension to the Guinness Centre, there are no other known developments in the pipeline for Newmarket. Newmarket has a distinct catchment falling wholly within the wider Cambridge catchment area. We consider it unlikely that developments in the pipeline would significantly increase the influence of Newmarket in the future.

Summary

- 4.35 The household telephone survey has identified Peterborough, Bury St Edmunds, Huntingdon, Stevenage, Ely and Newmarket as the main competing centres with Cambridge. In view of its present performance and in light of forthcoming developments which will significantly increase the existing quality and scale of its retail offer, it is clear that Peterborough is the most prominent of all identified competing centres. Similarly, proposed developments in Bury St Edmunds will raise the scale of the existing offer which may untimely increase its overall influence on shopping patterns in the sub region.
- 4.36 Overall, Cambridge is a strong centre and the high quality of its retail offer, supplemented by its attraction as a key tourist destination and popular University City, benefit the centre to the extent that surrounding centres are not capable of competing on the same level.

5. CAMBRIDGE CITY CENTRE HEALTHCHECK

- 5.1 Cambridge is a key regional centre, centrally positioned within the East of England region. Situated approximately 60 miles (97 km) north of London, the city is well connected to the capital by rail and air (via nearby Stansted Airport) as well as the M11 motorway which links with the M25. Cambridge city centre is the main regional shopping and service centre as well as a key tourist destination. The city exudes a wealth of historic and cultural qualities which, in addition to its status as an internationally renowned 'University City', attracts over 4.5 million visitors each year.
- 5.2 The city centre itself is situated at the heart of the City of Cambridge and the city centre boundary extends across a wide area incorporating the core shopping area as well as the University of Cambridge campus and a number of historic parks and gardens. Local planning policy divides the core shopping area into two distinct sectors: the Historic Centre and the Fitzroy-Burleigh area which includes the Grafton Centre.
- 5.3 Where data sources permit we have continued to distinguish between the two centres and undertaken a detailed healthcheck of each. Such as for diversity of uses, retailer representation, environmental quality, pedestrian flow and development opportunities we have distinguished between the centres. For financial indicators, accessibility, safety and occurrence of crime and customer views and behaviour, we consider Cambridge as a single centre.

The Historic Centre

- 5.4 The historic centre is broadly arranged on a north-south axis along Bridge Street, Sidney Street and St Andrews Street with a western extension encompassing Trinity Street and King's Parade. The centre comprises an irregular layout of traditional cobbled streets and interconnecting passageways which are interspersed with both historic listed buildings and some more modern developments such as the Lion Yard and the more recent Grand Arcade shopping centre. There is also a central market place at Market Hill.
- 5.5 The historic area contains a number of distinct sub areas which each offer an individual contribution towards the centre's overall offer. Such areas include King's Parade, characterised by boutiques, craft shops and art galleries and which leads onto Trinity Street, where there are a range of independent operators mixed with well-known high quality retailers including Hobbs, Reiss and Phase Eight. Further north is St John Street which accommodates the popular All Saints Arts and Craft Market once a week on Saturdays.
- 5.6 The centre is also home to a number of independent retailers, many of which are distributed along the cobbled Green Street and at the Sussex Street colonnade. A range of more exclusive and

designer retailers including Jack Wills, Molton Brown, L'Occitane and Neal's Yard are situated along the quaint passage at Rose Crescent. A more contemporary retail offer is orientated towards the southern parts of the centre within Lions Yard and Grand Arcade shopping centres and along Christ's Lane.

- 5.7 The Grand Arcade is Cambridge's most recent addition to shopping provision in the historic part of the City and comprises a two-level arcade and functional covered thoroughfare between St Andrew's Street and Lion Yard. The centre opened on 27th March 2008 comprising a total retail floorspace of approximately 41,805 sqm gross across 52 units largely dedicated to a higher quality retail offer which includes designer retailers All Saints and Gerry Weber. Other retailers represented in the centre include Links of London, Laura Ashley, Castle Galleries, Topshop, Warehouse, Coast, River Island, Apple, Vision Express and Clinton Cards.
- 5.8 The centre is anchored by a 19,509 sqm net John Lewis which opened in advance of the rest of the centre in November 2007. At the time of our site visit, approximately twenty units in the centre were vacant however there was clear indication that some were being prepared for occupation or had been let to retailers 'coming soon' including Ted Baker, L.K Bennett, Crew Clothing Co., The White Company and Quicksilver.

Diversity of Uses & Retailer Representation

- 5.9 The Experian Goad Town Centre Category Report (October 2007) identifies a total of 93,925 sqm of floorspace for retail trade and services, comprising 508 units¹ in the historic centre of Cambridge. Table 5.1 below highlights the composition of the historic centre by the number of units, compared to the average of all UK centres audited by Goad.

Table 5.1: Cambridge Historic Centre Retail Composition by Number of Units

Retail Category	No. of Units	% of Total	UK Average (%)	Variance
Comparison	213	41.93	35.73	6.31
Convenience	32	6.30	8.65	-2.32
Service	225	44.29	45.60	-1.17
Vacant	37	7.28	9.85	-2.85
Miscellaneous	1	0.20	0.17	0.03
Total	508	100	100	-

Source: Experian Category Report (October, 2007)

¹ It is important to note that the floorspace figures derived from the Experian Goad Plan only show the footprint of units, within the building lines, and do not provide a definitive figure of net or gross floorspace. They do not for example audit retail floorspace above ground floor level, apart from in enclosed shopping centres.

- 5.10 As the table above demonstrates, the historic centre is well represented by comparison retailers but this is countered by a lower than average number of units occupied by retailers in convenience and service categories.
- 5.11 When analysing the categories in more detail, in the comparison sector, there is above average representation of ladies and menswear and accessories, footwear, booksellers, jewellery, toiletries, cosmetics and beauty products and toys, games and hobbies. There is below average department and variety store representation although this does not take into account the recent opening of the John Lewis store in the Grand Arcade. There is also below average representation of children's and infants wear, florists and charity shops.
- 5.12 The historic centre has above average representation of grocers and delicatessens, health foods and off licences, but below average representation of bakers and confectioners and supermarkets in the convenience sector. The centre has an above average number of cafes, restaurants, bars and public houses in the leisure service category as well as above average provision of post offices, photo studios, banks, building societies and employment and career services in the retail and financial service categories. But there is under average representation in the number of fast food and takeaway outlets, health and beauty operators, opticians and travel agents.

Vacant Retail Property

- 5.13 Table 5.2 indicates that there are currently 37 vacant units the Historic Centre of Cambridge, which equates to a vacancy rate of 7.3% and is below the 9.8% national average. In terms of retail floorspace, 8.7% of floorspace in Cambridge is vacant which is above the national average of 7.9%. The Experian Survey was undertaken prior to the opening of the Grand Arcade and Christ's Lane and is therefore misleading as vacant units were under construction as part of these developments.

Table 5.2: Cambridge Historic Centre Vacancies

Vacant Units	% of Total Units	UK Average (%)	Vacant Floorspace (sqm)	% of Total Floorspace (Sqm)	UK Average (%)
37	7.28	9.85	8,194	8.72	7.96

Source: Experian Category Report (October, 2007)

- 5.14 Aside from units under construction, the vacant units are distributed fairly evenly throughout the centre and at the time of our site visit there were 12 vacant units within the designated primary retail frontage. The Grand Arcade development has resulted in the re-location of some retailers, including Clintons Cards, Warehouse, River Island and Topshop/Topman, leaving several vacant units along Petty Cury. These units are however in the process of being re-occupied. We understand that Clarks are expanding into the Warehouse unit, Burton/Dorothy Perkins are taking the former Topshop unit and there is an interest in the River Island unit.

Environmental Quality

- 5.15 The historic centre offers an overall pleasant and attractive shopping environment. The whole of the historic centre is situated within a Central Conservation Area designation and there are approximately 778 listed buildings within Cambridge city². Most of the buildings are 3-4 storeys and tower over the narrow, cobbled shopping streets. Market Hill provides an open-space and the market supports a lively and active environment overlooked by shops and cafes.
- 5.16 There is good provision of street furniture including seating, works of art, signage and bins although the level of cycle parking provision could be increased. The City is currently piloting a new signage project to improve pedestrian signage in the centre which will include a map illustrating key areas of interest. We are aware that the City Centre Management have been seeking views on providing additional street entertainment to create a more vibrant street scene for visitors.
- 5.17 At the time of the site visit the centre was clean with little evidence of litter or graffiti. Individual vacant units detract somewhat from the historic environment. At the time of the site visit there were significant building works underway along Bridge Street, Trinity Street and around Grand Arcade however these are expected to be short-term disruptions and will result in overall improvements to the quality of the shopping environment once complete.

Pedestrian Flows

- 5.18 Pedestrian surveys of the historic centre were undertaken by PMRS in June 2001 and more recently in April 2008 following the opening of the Grand Arcade in March. The results of the 2008 survey reveal the highest levels of pedestrian flow within and around Lion Yard and the Grand Arcade. This is consistent with the concentrated presence of national multiple retailers in the two adjoined shopping centres and close accessibility to the multi-storey car parks which support a high level of pedestrian footfall. The results of the 2001 identified the same high level of pedestrian footfall within Lions Yard and along St Andrew's Street.
- 5.19 The 2008 survey identified lowest levels of pedestrian flow in the more peripheral areas of the historic centre, along Regents Street, Benet Street and Queen Street where the retail offer is much weaker. The results of the 2001 survey also identified low footfall in these areas although the lowest point of pedestrian footfall was at the junction between Jesus Lane and Sidney Street. In contrast, the more recent study much higher levels of activity around the same area which suggests the northern parts of the city are becoming increasingly popular, possibly as a result of a noticeable number of eating and drinking establishments distributed further north along Bridge Street.

² English Heritage, 2004

Development Opportunities

- 5.20 On the whole there are very few development opportunities in Cambridge. The Grand Arcade and Christ's Lane schemes have involved redevelopment of significant areas of the City Centre. In the long term it is likely to mainly be infill developments coming forward. For example, other blocks close to Christ's Lane could be redeveloped. Another key area for further consideration is Market Hill. This is currently occupied on a permanent basis by the street market. When this is not open or at less than full occupancy it is not maximising the use of this space and alternative uses may be appropriate in the future.

The Fitzroy-Burleigh Area

- 5.21 The Fitzroy-Burleigh area displays characteristics of a more modern shopping high street. Situated just under half a mile to the east of the historic centre, the shopping area comprises a range of retail units on Fitzroy Street and Burleigh Street which is supplemented by additional retail and leisure provision within the Grafton Shopping Centre. A pathway across the historic Christ's Piece Park links the two centres.
- 5.22 The Grafton Shopping Centre opened in 1983 but has since been extended twice in 1995 and 2005 and currently comprises approximately 38,460 sqm gross retail floorspace. In contrast to the historic part of the City, the retail offer at the Grafton Centre has more emphasis on mainstream fashion with retailers Debenhams and Bhs occupying the anchor stores. Other retailers represented in the centre include Warehouse, Burton, Oasis, Next, Zavvi, Boots and a 1,360 sqm gross Marks & Spencer Simply Food store. The centre is more family-orientated and there is a leisure element which includes an eight-screen Vue cinema and restaurants and cafes such as Bella Italia and Costa Coffee.
- 5.23 The shopping offer along Fitzroy Street is similarly mainstream with units occupied by multiple retailers including Argos, The Pier, Superdrug, Game and The Works. Aside from some more modern units situated to the west, the retail offer along Burleigh Street largely comprises independent traders and charity shops in small, poorly configured retail units.

Diversity of Uses & Retailer Representation

- 5.24 The Experian Goad Town Centre Category Report (October 2007) identifies a total of 54,265 sqm of floorspace for retail trade and services, comprising 210 units³ in the Fitzroy-Burleigh area of Cambridge (including the Grafton Centre). Table 5.3 below highlights the composition of the shopping area by the number of units, compared to the average of all UK centres audited by Goad.

³ It is important to note that the floorspace figures derived from the Experian Goad Plan only show the footprint of units, within the building lines, and do not provide a definitive figure of net or gross floorspace. They do not for example audit retail floorspace above ground floor level, apart from in enclosed shopping centres.

Table 5.3: The Fitzroy-Burleigh Area Retail Composition by Number of Units

Retail Category	No. of Units	% of Total	UK Average (%)	Variance
Comparison	98	46.67	35.73	10.94
Convenience	14	6.67	8.65	-1.98
Service	82	39.05	45.60	-6.56
Vacant	15	7.14	9.85	-2.71
Miscellaneous	1	0.48	0.17	0.30
Total	210	100	100	-

Source: Experian Category Report (October, 2007)

- 5.25 The Fitzroy-Burleigh area is well represented by comparison retailers with provision almost 11% above the national average. However, the centre has below average representation in all other retail categories, most noticeable in the service category where provision in this sector is 6.56% below average.
- 5.26 Analysing the categories in greater detail, the comparison provision largely consists of retailers offering ladies and menswear and accessories, jewellery, telephones and accessories, toiletries, cosmetics and beauty products and toys, games and hobbies. There is also good department store representation and above an average number of charity shops. The convenience provision is dominated by bakers and confectioners and convenience stores. There is a single butchers and one grocers/delicatessen, but there is no off licence or supermarket. The service category is dominated by health and beauty salons, cafes and financial and business services, whilst there is below average provision of restaurants, public houses and fast food takeaways.

Vacant Retail Property

- 5.27 Table 5.4 indicates that there are currently 15 vacant units the Fitzroy-Burleigh area of Cambridge, which equates to a vacancy rate of 7.1% and is below the 9.8% national average. In terms of retail floorspace, only 2.8% of floorspace in this area of Cambridge is vacant which is significantly below the national average.

Table 5.4: Fitzroy-Burleigh Area Vacancies

Vacant Units	% of Total Units	UK Average (%)	Vacant Floorspace (sqm)	% of Total Floorspace (Sqm)	UK Average (%)
15	7.14	9.85	1,561	2.88	7.96

Source: Experian Category Report (October, 2007)

- 5.28 The vacant units are evenly distributed throughout the shopping area and all are within the primary shopping frontage. Our site visit identified 7 vacant units within the Grafton shopping centre although one of these was being fitted out and another was used as a display area for the adjacent retailer. There is a sizeable vacant unit, formally used temporary by Sayles (John Lewis) department store on

Burleigh Street. The remaining vacant units are situated on both Burleigh Street and Fitzroy Street and aside from the former Habitat unit (which is currently being fitted out) are generally small units.

Environmental Quality

- 5.29 The Fitzroy-Burleigh area of the town centre offers a more modern shopping high street scene in contrast to the traditional elements of the historic centre. Both Fitzroy Street and Burleigh Street are pedestrianised and there is good provision of street furniture including seating, bins, lighting and trees along Fitzroy Street. There are also a number of temporary stalls and a large 'fruit and veg' trailer positioned along the street adding to the lively street scene. Many of the units along Fitzroy Street are large and modern and occupied by key retailers including Argos, Pier, Blacks and Starbucks. In contrast, many of the units along Burleigh Street are smaller and less-well maintained. The overall environment along Burleigh Street becomes more degraded as distance from the Grafton Centre increases.
- 5.30 The Grafton Centre offers a modern shopping environment which is well managed and clean with good provision of planting and seating. There are some vacant units, but these do not detract significantly from the overall environment.

Pedestrian Flows

- 5.31 A pedestrian survey of the Fitzroy-Burleigh area was undertaken by PMRS in April 2008. The results of the 2008 survey reveal the highest levels of pedestrian flow within the Grafton Shopping Centre. This is consistent with the concentrated presence of national multiple retailers and access to the centre's multi-storey car parks which support a high level of pedestrian footfall. Lowest levels of pedestrian flow were identified at access points to the Grafton Centre from Napier Street and Wellington Street situated north of the centre. Low levels of activity were also identified at the southern-most points along Burleigh Street where the retail offer is much weaker.

Development Opportunities

- 5.32 The Fitzroy-Burleigh area is relatively constrained by surrounding residential areas and the A603 East Road which presents little scope for further expansion. There are a number of vacant properties and Burleigh Street in particular would benefit from some refurbishment or redevelopment to raise its level to that of the rest of the centre.

Retailer Demand

- 5.33 We have used published data scores to analyse the retailer demand for Cambridge. This includes both the historic centre and the Fitzroy-Burleigh area. Table 5.5 demonstrates a fluctuating pattern with the overall number of requirements peaking at 204 in 2002. The number of requirements for Cambridge is currently at its lowest reflecting the take up of units in the Grand Arcade scheme. At

present (April 2008), Focus Property Intelligence database identifies 147 requirements for Cambridge City Centre (incorporating the Fitzroy-Burleigh area), compared with 178 requirements in April 2007.

Table 5.5: Cambridge Retailer Requirements

No. of Requirements	Ranking (1 st Highest)	Date
147	-	Apr 2008
178	5	Apr 2007
195	3	Apr 2006
201	3	Apr 2005
178	3	Apr 2004
190	5	Apr 2003
204	2	Apr 2002

Source: Focus Property Intelligence (April 2008)

- 5.34 Table 5.6 provides a more detailed picture of the 147⁴ registered retailer requirements for Cambridge in April 2008. The majority of the requirements are from comparison retailers and include a number of high quality and designer fashion retailers such as Tommy Hilfiger, Levi Strauss and Oliver Bonas. There are also requirements from household interior retailers including The Pier as well as some discount high street retailers such as Peacocks, TJ Hughes, 99p stores ltd and Poundland. There are only 4 requirements from convenience retailers which include two specialist food retailers (Olio & Farina and Nuggs), an organic foodstore (Planet Organic) and a bakery (Bakers Oven).

Table 5.6: Cambridge Retailer Requirements by Use Category and Floorspace (sqm)

Use Category	No. of Requirements	Min. Floorspace (sqm gross)	Max. Floorspace (sqm gross)
Comparison	93	23,844	55,758
Convenience	4	667	1,426
Service	45	16,799	27,229
Other	5	6,224	16,016
TOTAL	147	47,534	100,429

Source: Focus Property Intelligence (April 2008)

- 5.35 There are requirements from service operators including three health and fitness operators, several coffee and sandwich operators such as Coffee Republic, Costa Coffee, Pret a Manger and Subway and high street restaurant chains including Gourmet Burger Kitchen, La Tasca, Toby Carvery and Old Orleans. Other requirements include public house and wine bar operators (Barracuda Group Ltd, Marstons Plc, Walkabout and Vintage Inns) as well as Liquid and Jongleurs club operators.

⁴ It is important to note that some of the requirements indicated may be for out of centre floorspace.

Shopping Rents

- 5.36 The level of rent which retailers are prepared to pay for retail space within a centre provides a good indication of the perceived strength of a centre as a shopping location (although other factors such as the availability of floorspace have an impact on rental values).
- 5.37 In 2007, Prime Zone A retail rents in Cambridge were £2,637 per sqm, which is higher than almost all other centres in the sub region apart from Milton Keynes. Between 2002–2006, rents in Cambridge remained static at £2,583 per sqm. The increase in 2007 is likely to be the 'Grand Arcade' effect, raising the popularity of the city. Rents in other large centres in the region, such as Milton Keynes, Norwich and Peterborough remained static between 2006 and 2007.

Table 5.7: Cambridge Zone A Rents (£ per sqm)

Centre	2002	2003	2004	2005	2006	2007
Milton Keynes	2583	2583	2691	2852	2960	2960
Cambridge	2583	2583	2583	2583	2583	2637
Norwich	2153	2153	2153	2260	2260	2260
Peterborough	2207	2207	2260	2260	2260	2260
Chelmsford	1615	1615	1772	1776	1830	1938
Colchester	1615	1615	1615	1668	1830	1830
Bury St Edmunds	1130	1130	1130	1130	1130	1238
Stevenage	1130	1130	1184	1184	1184	1238
Bedford	1023	1023	1076	1076	1076	1130
Kings Lynn	915	915	915	915	915	915
Letchworth	377	377	377	484	484	538
Sudbury	592	592	646	646	700	700

Source: Colliers CRE, June 2007

Commercial Yields

- 5.38 Yields in Cambridge have followed a similar pattern to rents, falling more recently to 5% from 5.25% in 2006. This is indicative of investor confidence in the city centre. Nearby Bury St Edmunds has experienced a similar pattern, also falling to 5% in 2007, whilst Peterborough has maintained 5% yields since 2002.

Table 5.8: Cambridge Property Yields (%)

Centre	Apr-02	Apr-03	Jul -04	Jul-05	Jul-06	Jul-07
Milton Keynes	4.75	4.75	4.75	4.75	4.75	4.5
Chelmsford	5.5	5.5	5.5	5.25	4.75	4.75
Colchester	6	6	6	5.35	4.75	4.75
Bury St Edmunds	5.25	5	5.25	5	5.25	5
Cambridge	5.25	5.5	5.5	5.25	5.25	5
Peterborough	5	5	5	5	5	5
Norwich	5	5.5	5.5	5.5	5.5	5.5
Sudbury	7.75	6.75	7	6.75	6	5.75
Bedford	6	6	6	6	6	6
Stevenage	7	7	7	6.5	6.5	6.5
Kings Lynn	7	7	7	7	7	7
Letchworth	8.5	8.5	8.5	8.5	8.5	8.5

Source: Valuation Office Agency, Property Market Report July 2007

Accessibility

- 5.39 Both the Fitzroy-Burleigh area and the historic part of Cambridge city centre are reasonably accessible by a range of transport modes. Cambridge railway station is situated approximately 20 minutes walk or 10 minutes bus ride to south-east of the historic centre. The Cambridge Express operates a direct service to London Kings Cross in under an hour with trains leaving every 30 minutes. There are also frequent services operating to Stansted Airport, Peterborough and Kings Lynn as well as services to more local destinations including Waterbeach, Ely and Bishops Stortford.
- 5.40 Much of the historic centre, particularly to the north, operates as a pedestrian only zone with restricted access for buses, emergency vehicles and permit holders only. There are various car parks situated in close proximity to the central area and these are set out in the table below. There are a total of 3,097 car parking spaces and there are minimal on-street parking opportunities. The overall provision is considered relatively low for a centre the size of Cambridge and its role as a key tourist destination. However, the results of the in-centre survey show that 19% choose to drive to the centre, whilst 22.5% prefer to get the bus, 21.8% choose to walk and 9.4% prefer to cycle.

Table 5.9: Car Park Provision

Car Park	No. of Spaces
Adam and Eve Street Car Park	40
Castle Hill Car Park	115
Grafton East Multi-Storey	810
Grafton West Multi-Storey	265
Grand Arcade Multi-Storey	902
Gwydir Street Car Park	50
Park Street Multi Storey	375
Queen Anne Terrace Multi-Storey	540
Total	3,097

Source: Cambridge City Council, April 2008

- 5.41 The results of the in-centre survey highlights the Grand Arcade multi-storey as the most popular car-park used by 21.8% of visitors to the city centre. The Grafton East multi storey is also a popular choice, used by 17.7% of visitors. The remaining car parks are only used by 5.4% or less of visitors to the city. Interestingly, 19% of those surveyed did not know where they had parked or had been dropped off.
- 5.42 The in-centre car parking provision is complemented by five park and ride sites situated in the wider Cambridge area. The sites at Babraham Road, Cowley Road, Madingley Road, Newmarket Road and Trumpington all operate Monday to Saturday with the latter three also operating services on Sundays between 9:00am and 6:00pm. The results of the in-centre survey reveal 11.8% of visitors use the park and ride facilities to access the centre with Trumpington and Madingley Road being the most popular.
- 5.43 The survey results also highlight high levels of bus usage with 22.5% choosing this mode of transport to access the city centre. Cambridge bus station is located off Drummer Street in close proximity to both the historic centre and the Grafton Centre. The bus station is relatively small and somewhat dated and in need of refurbishment. Additional bus stops are situated nearby along Emmanuel Street and St Andrews Street. Towards the north of the historic centre, there are also bus stops located along Bridge Street and Jesus Lane.
- 5.44 There is a high level bicycle usage facilitated by a number of dedicated cycle lanes, but insufficient cycle parking provision. Despite the existing provision of cycle parking facilities throughout the centre and secured parking space for 200 cycles at Park Street Car Park, at the time of our site visit the majority of cycle parking facilities were over-full and many had been forced to secure their cycles to railings and other structures. Bike and Ride facilities provide the opportunity for visitors to secure their cycles at the Madingley Road and Newmarket Road Park and Ride sites and catch a bus into the city centre.

Safety and Occurrence of Crime

- 5.45 Cambridge has a CCTV system which operates 162 cameras with coverage across the city centre, the bus station and car parks including Grafton East, Lion Yard / Grand Arcade, Park Street and Queen Anne car park. There are four re-deployable cameras which can be deployed for short periods of time at various locations when the need arises. A CCTV supervisor and 2 CCTV operators monitor the cameras 24 hours a day, every day of the year to detect or deter crime and anti-social behaviour in the areas of the City covered. On average there are around 12,000 calls between CCTV and the Police each year⁵.

Customer Views and Behaviour

- 5.46 In order to understand the views and behaviour of visitors to Cambridge city centre, an in-centre survey of 510 shoppers was undertaken in April 2008 at six points across the centre including one at the Grafton Centre. The survey and questionnaire were commissioned by GVA Grimley and interviewing and data processing was undertaken by Research and Marketing. The results are attached in Appendix 8.
- 5.47 Shoppers were asked about the frequency of their visits to the centre and the reasons for their visit. The results highlight that:
- The majority (39.8%) visit for the purpose of non-food shopping and only 9.4% visit for food shopping whilst 11.8% visit for work or business purposes, 2.2% for tourist/sight holidays and 2.5% for daytrips.
 - 10.6% would like to see a Woolworths in the centre and 7.5% a Primark;
 - 44.5% visitors choose Cambridge because it is close to home/they live there and 13.1% choose it because there is a good range of shops and services;
 - Less than 4% visit the centre as a tourist or because of the attractive environment and less than 1% visit the centre because there is a good range of food and drink outlets or because of the market;
 - The majority of visitors spend between 1.5 and 2 hours in the centre (22.7%). 19.2% spend up to 3 hours in the centre, 12.2% up to 4 hours and 11.8% over 5 hours;
 - For shopping purposes, 22.9% visit the centre 2-3 times, 19.8% visit the centre once a week and 6.9% visit everyday. 72% visitors never undertake late night shopping;
 - 38.9% of those visiting the Grafton Centre always visit the rest of the city centre as well, 47.8% sometimes do;

⁵ Source: Cambridge City Council's CCTV System An Overview, March 2007

- 59.5% of those using the historic centre sometimes visit the Grafton centre, whilst 16.7% always do;
 - 2.5% visitors revealed eating/drinking as their main purpose for their visit to Cambridge however 10% highlighted eating/drinking as something else they would do to accompany their main purpose.
- 5.48 The above highlights that Cambridge city centre is a strong destination for shopping but it also performs well as well as a location for supplementary activities such as eating and drinking. Overall, 24.3% like Cambridge because of its attractive environment and 23.3% like the good shops it has on offer. When asked what they disliked about the city centre, 35.9% answered 'nothing / very little' although 12.5% disliked the traffic congestion and difficulty in reaching the centre by car and 12% disliked the cost of parking. Subsequently, 8% would visit the centre more often if parking costs were reduced although 30.2% revealed that no improvements were needed to persuade them to visit more often. The survey also revealed 41.9% would visit the centre more often following the opening of the Grand Arcade shopping centre which is considered significant in view of the relatively short space of time the centre has been open and has yet to establish itself fully and let all available floorspace.

Summary

- 5.49 Cambridge City Centre is an attractive and vibrant retail destination with a high quality environment and considerable historic and architectural heritage which is well integrated with recent developments of a more modern design. The city centre has a broad offer which appeals to a range of shoppers. There is a good range of mainstream multiple retailers including department stores John Lewis and Debenhams, and there are an increasingly upmarket range of exclusive designer retailers in the new Grand Arcade development. The Grafton Centre meets more mainstream shopping requirements and overall provision in the city centre is complemented by numerous special interest and independent local shops which contribute to the distinct individual character of the centre.
- 5.50 Our assessment suggests that Cambridge is performing well in a number of the health check indicators. Rents have recently increased after a static period and yields have fallen level to the lowest in five years. The level of vacant units is below the national average and there are strong retailer requirements. In general the environment across the city centre is maintained to a high standard and respondents from the in-centre survey indicate few improvements to the centre which would make them visit more often.
- 5.51 The City Centre operates a pedestrian-only zone which restricts vehicular access to the centre. The in-centre survey highlighted some dissatisfaction with this, however, the results also show that the majority of visitors choose to travel by bus or walk and it was evident from our site visit that there is a high level of cycle usage. With respect to the latter, there is a need for additional cycle parking provision as the over-crowding of existing facilities created a cluttered environment in places.

- 5.52 With recent developments in the historic part of the centre, including Christ's Lane and the Grand Arcade, there appears to be little short-term scope for further significant retail development. Future development in the historic centre is likely to focus on replacement and infill of dated blocks/units. There is also scope for improvements to Burleigh Street to improve the overall aesthetic qualities of the area.

6. CAMBRIDGE DISTRICT & LOCAL CENTRES

6.1 In this section we examine the district and local centres in the adopted Cambridge City Local Plan, considering the current role and function of the centres and the extent to which they are meeting resident's shopping needs. We also comment on the scope for centres to change their position in the hierarchy over the LDF period.

6.2 PPS6 provides the following definitions for district and local centres:-

- **District Centres** – will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services such as banks, building societies and restaurants, as well as local public facilities such as a library.
- **Local Centres** – include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub post-office and a pharmacy. Other facilities could include a hot-food takeaway and laundrette. In rural areas, large villages may perform the role of a local centre.

6.3 The adopted Cambridge City Local Plan (July 2006) recognises the important function of the district and local centres providing vital services close to where people live and work. The plan notes that the district and local centres help to meet day-to-day shopping and service needs and reduce the need to travel.

6.4 Policy 6/7 permits additional development which will cater mostly for local people and is of an appropriate scale to the centre. Changes of use from A1 to A2/3/4/5 uses will only be permitted provided that the percentage of A1 uses, measured by the number of units, does not fall below 60%.

6.5 Policy 6/8 limits the size and scale of convenience retailing permitted in the district and local centres. It states that convenience floorspace will only be permitted for small shops up to 1,400 sqm net or for minor extensions or where it would replace existing provision in the locality.

6.6 The published information for these centres is limited and our healthcheck assessment therefore draws largely on data provided by Cambridge City Council and detailed site visits carried out by GVA Grimley in March 2008. For each centre we have prepared a standardised proforma which considers the following:-

- Retail composition including number, size and type of units/uses;
- Centre boundary/frontages/development opportunities;
- Physical, functional and environmental characteristics;
- Anchor/Key Stores;
- Vacancies;
- Accessibility and Car Parking; and

- Overall role of centre and its position in the retail hierarchy

- 6.7 The proformas are set out in Appendix 3 and this chapter provides an overview of the provision of district and local centres and considers their future roles.
- 6.8 Plan 11 shows the Cambridge retail hierarchy and the distribution of district and local centres. The three district centres are located close to the city centre with two to the south; Mill Road West and Mill Road East and one to the north; Mitcham's Corner. The 22 Local Centres are fairly evenly distributed around the city centre although there appear to be more Local Centres to the north and the south than the east and west. It would also appear that there are gaps in the current provision where new residential development is planned (see Plan 13) and thus it will be important for the Council to ensure that new residential developments are served by local shops for everyday convenience and service needs, which is discussed in more detail in our final section.
- 6.9 To put the centres in context, Table 6.1 highlights the number of units in the convenience, comparison, service and vacant categories in each centre. Table 6.1 shows that the three district centres contain between 60 and 85 units. The local centres range in size from Cherry Hinton High Street and Cherry Hinton Road West which have 31 units to the smaller centres, some of which contain less than five units.

Table 6.1: Composition of District and Local Centres

Centre	No. of Outlets (2008)								TOTAL
	Convenience		Comparison		Service		Vacant		
Mill Road West (District)	13	15%	19	22%	47	55%	4	5%	85
Mill Road East (District)	8	11%	23	32%	28	38%	8	11%	73
Mitcham's Corner (Dist.)	8	13%	17	28%	30	50%	1	2%	60
Cherry Hinton High St	6	19%	6	19%	12	39%	2	6%	31
Cherry Hinton Rd West	4	13%	7	23%	16	52%	1	3%	31
Hills Road	2	7%	5	19%	15	56%	3	11%	27
Chesterton High Street	3	13%	4	17%	12	50%	1	4%	24
Newnham Road	1	5%	3	16%	6	32%	4	21%	19
Arbury Court/Milton Rd	2	12%	6	35%	8	47%	0	0%	17
Arbury Court	6	38%	3	19%	5	31%	2	13%	16
Cherry Hinton Rd East	2	13%	5	31%	8	50%	1	6%	16
Norfolk Street	4	33%	1	8%	6	50%	0	0%	12
Barnwell Road	2	22%	2	22%	3	33%	1	11%	9
Histon Road	5	56%	2	22%	2	22%	0	0%	9
Victoria Road	1	11%	1	11%	3	33%	3	33%	9
Wulfstan Way	4	44%	1	11%	3	33%	1	11%	9
Trumpington	4	50%	2	25%	2	25%	0	0%	8

Centre	No. of Outlets (2008)								TOTAL
	Convenience		Comparison		Service		Vacant		
Adkins Corner	1	17%	2	33%	3	50%	0	0%	6
Ditton Lane	2	33%	1	17%	2	33%	0	0%	6
Grantchester Street	3	60%	1	20%	1	20%	0	0%	5
Green End Road	1	20%	3	60%	1	20%	0	0%	5
Akeman Street	2	50%	1	25%	1	25%	0	0%	4
Fairfax Road	1	25%	2	50%	1	25%	0	0%	4
King Hedge's Road	1	25%	2	50%	1	25%	0	0%	4
Campkin Road	1	33%	0	0%	2	67%	0	0%	3

Source: Cambridge City Council and GVA Grimley, 2008

NB – Total column may not added as some centres contain units that have been categorised as 'other'.

- 6.10 Vacancies in all of the centres are low. Victoria Road has the highest vacancy rate of 33% and a third of all units in the centre are currently vacant. Several of the other centres have relatively high vacancies including Arbury Court, Hills Road and Mill Road East.
- 6.11 Table 6.1 also provides information on the composition of the units in the centre. It is evident that all of the centres have at least one convenience store. The larger centres have more convenience units and contain larger stores with a more varied product range. Many of the foodstores in the centres are operated by national multiples such as One Stop, Co-Op, Iceland, Budgens, Londis and Tesco's Express format. Mill Road West is the only district centre which does not have a foodstore operated by a national multiple. We also understand that Tesco are taking over the former Wilco Motorists Discount store unit at 163-167 Mill Road East.
- 6.12 The presence of a national multiple foodstore operator in the Local Centres does not appear to be linked to the total size of the centre, as some of the smallest centres have foodstores operated by national multiples, such as Campkin Road which has a Tesco Express and King Hedges Road which has a Co-Op (Table 6.2). Many of the foodstores offer additional services such as dry cleaning, cash points and several incorporate a sub post office.
- 6.13 Many of the centres also have a good range of other convenience uses such as independently operated butchers, bakeries, greengrocers and delicatessens. Our analysis reveals that these independent stores are often located in close proximity to a multiple foodstore retailer and this does not appear to impact on their trade.
- 6.14 We have also looked at the range of comparison retailers and services on offer in the district and local centres. It is evident that the three larger district centres have a more varied range of shops and services including some comparison shops selling specialist goods such as the party shop in Mitcham's Corner and the alternative bookshop in Mill Road East.

- 6.15 All of the district and local centres are dominated by service uses, as would be expected for these types of centres. Common services include hairdressers, banks and building societies, betting shops, cafés, pharmacies, post offices and takeaways. Table 6.2 shows that the majority of the centres have a takeaway and foodstore and/or newsagent. Many have a hairdressers, pharmacy and post office; however banks and building societies are only present in the larger centres.

Table 6.2: District and Local Centre Key Convenience and Service Provision

Centre	Multiple Food store	CTN	Hair Salon	Chemist	Post Office	Bank/ Building Society	Take-away
Mill Road West (District)		✓	✓		✓	✓	✓
Mill Road East (District)	✓	✓	✓	✓	✓	✓	✓
Mitcham's Corner (Dist.)	✓	✓	✓	✓	✓	✓	✓
Cherry Hinton High St	✓	✓	✓	✓	✓	✓	✓
Cherry Hinton Rd West		✓	✓			✓	✓
Hills Road	✓	✓	✓	✓	✓		✓
Chesterton High Street	✓	✓	✓		✓		✓
Newnham Road		✓					✓
Arbury Court/Milton Rd	✓		✓	✓			✓
Arbury Court	✓	✓	✓	✓	✓		✓
Cherry Hinton Rd East		✓		✓	✓		✓
Norfolk Street		✓	✓				✓
Barnwell Road	✓			✓			✓
Histon Road	✓	✓		✓	✓		✓
Victoria Road		✓					✓
Wulfstan Way	✓	✓	✓	✓			✓
Trumpington	✓	✓		✓	✓		✓
Adkins Corner	✓			✓			
Ditton Lane		✓	✓	✓			✓
Granchester Street		✓	✓	✓	✓		
Green End Road		✓					
Akeman Street		✓					✓
Fairfax Road		✓					
King Hedge's Road	✓	✓					
Campkin Road	✓						✓

Source: Cambridge City Council and GVA Grimley, 2008

- 6.16 In order to look at the effectiveness of the Cambridge City Council's Local Plan policy to control changes of use, we have looked at the percentage of A1 uses in each centre as shown in Table 6.3. Policy 6/7 states that changes of use from A1 to A2/3/4/5 uses will only be permitted provided that

the percentage of A1 uses, measured by the number of units, does not fall below 60%. It is clear from our analysis that the majority of centres have at least, or close to 60% of A1 uses, however, there are six Local Centres (Cherry Hinton High Street, Cherry Hinton Road West, Chesterton High Street, Victoria Road, Campkin Road and Newnham Road) and one district centre (Mitcham's Corner) which have less than 60% of A1 uses. It is important to note that this does not necessarily reflect on the vitality and viability of these centres as many important local services such as cafés, restaurants and banks fall outside of the A1 use class.

- 6.17 It is also important for the Council to consider how to control the conversion of vacant commercial properties to residential units to prevent the loss of important local shopping facilities and to prevent local centres becoming too dispersed with residential units.

Table 6.3: District and Local Centres: Percentage of A1 Uses

Centre	Percentage of A1 Uses
Granchester Street	100%
Fairfax Road	100%
King Hedge's Road	100%
Arbury Court	88%
Green End Road	80%
Histon Road	78%
Wulfstan Way	77%
Trumpington	75%
Mill Road East (District)	66%
Adkins Corner	66%
Ditton Lane	66%
Cherry Hinton Road East	63%
Akeman Street	60%
Hills Road	59%
Arbury Court/Milton Road	59%
Mill Road West (District)	58%
Norfolk Street	58%
Barnwell Road	56%
Mitcham's Corner (District)	53%
Cherry Hinton High Street	52%
Cherry Hinton Road West	52%
Chesterton High Street	46%
Victoria Road	44%
Campkin Road	33%
Newnham Road	32%

Source: Cambridge City Council and GVA Grimley, 2008

- 6.18 Our assessment has found that all of the district and local centres are well served by public transport with good pedestrian linkages to surrounding residential areas. Many of the largest centres also have on-street parking, which is particularly important where specialist uses attract people from outside of the local walk-in catchment area, and where centres are located on strategic routes that cater for the needs of those passing through, as well as the local population. It is important to ensure that short-stay parking provision is not compromised in the centres over the LDF period.
- 6.19 The environmental quality of the centres is generally good; most consist of converted residential properties or purpose built parades in residential areas. Newnham Road has a distinct environment due to its location on the river. Several of the centres look tired in parts and would benefit from environmental improvements, such as new, street furniture and enhanced hard and soft landscaping and planting. The centres are generally clean and shop fascias are well maintained. The only exception to this is Green End Road which we consider to be relatively unattractive and in need of updating to improve the overall appearance of the centre.

Summary

- 6.20 Future growth in many of the centres is constrained by their proximity to neighbouring residential areas, nevertheless we have identified several sites that offer scope for redevelopment and change over the LDF period to enhance the local shopping provision in Cambridge. Given the level of new residential development planned for the Cambridge urban area, where new Local Centres are planned, it will be important to ensure that the provision of new centres does not result in the decline of existing centres.
- 6.21 Key opportunities identified are:-
- **Mill Road East** – several vacant units including three adjacent units in the heart of the centre. Tesco have acquired the former Wilco Motorists Discount store at 163-167 Mill Road East and plan to open in the near future, subject to planning approval.
 - **Barnwell Road** – vacant unit adjacent to McDonalds.
 - **Campkin Road** – dated appearance and low density development; potential to expand the range of local shops and services.
 - **Cherry Hinton High Street** – large vacant unit in middle of centre (former Cherry discount store); the provision of cafés/restaurants could enhance the vitality and viability of this large local centre.
 - **Cherry Hinton Road West** – opportunities to expand and improve linkages to the Cambridge Leisure Park; former car showroom offers a large vacant units on the edge of the centre.
 - **Green End Road** – generally considered to be in need of updating.
 - **Victoria Road** – former Blockbuster unit is vacant, occupying a prominent corner site.

7. SOUTH CAMBRIDGESHIRE RURAL CENTRES

- 7.1 This section examines the five rural centres identified in the South Cambridgeshire Core Strategy DPD, namely Sawston, Histon and Impington, Great Shelford and Stapleford, Fulbourn and Cambourne, as well as the eight minor rural centres of Willingham, Waterbeach, Papworth Everard, Melbourn, Linton, Bar Hill, Cottenham and Gamlingay.
- 7.2 The adopted Development Control Policies in the South Cambridgeshire Local Development Framework afford a high level of protection to local services and facilities such as village pubs, shops, post offices, community meeting places and health centres.
- 7.3 As with the district and local centres in Cambridge, there is limited published information available for these centres and our healthchecks therefore draw on data provided by South Cambridgeshire District Council and detailed site visits carried out by GVA Grimley in March and June 2008. We have prepared a proforma covering a range of PPS6 vitality and viability indicators for each centre. These proformas are set out in Appendix 4 and we summarise the findings below.
- 7.4 Plan 12 shows the location of the rural and minor rural centres in South Cambridgeshire. It is clear from the plan that these centres are located in a ring around Cambridge. Several of the centres lie further away from Cambridge such as Gamlingay and Papworth Everard. It is also important to note that the proposed town centre of Northstowe will be located to the north west of Cambridge off the A14.
- 7.5 Table 7.1 highlights the number of units in the convenience, comparison, service and vacant categories in each centre. It is evident that Sawston is the biggest centre in terms of the total number of units in the centre; Papworth Everard is the smallest centre. Cambourne has a total of 18 units, but not all of the floorspace in Cambourne has been built. All of the centres have a good range of convenience, comparison and service uses and vacancy rates are very low, which indicates that the centres are healthy.

Table 7.1: Composition of South Cambridgeshire Rural and Minor Rural Centres

Centre	No. of Outlets (2008)								
	Convenience		Comparison		Service		Vacant		TOTAL
Sawston	8	14%	16	28%	30	53%	2	4%	57
Histon & Impington	6	11%	15	28%	27	50%	1	2%	54
Great Shelford & Stapleford	9	20%	11	24%	22	48%	1	2%	46
Cottenham	10	27%	4	11%	15	41%	0	0%	37
Willingham	4	15%	11	41%	7	26%	0	0%	27
Linton	4	4%	6	32%	14	4%	0	0%	26
Fulbourn	4	17%	8	33%	9	38%	3	13%	24
Melbourn	4	19%	2	10%	14	67%	0	0%	21
Gamlingay	5	25%	2	10%	10	50%	0	0%	20
Cambourne	1	6%	1	6%	11	61%	3	17%	18
Waterbeach	4	25%	1	6%	10	62%	0	0%	16
Bar Hill	2	13%	4	25%	9	6%	0	0%	16
Papworth Everard	1	8%	2	17%	4	33%	1	8%	12

NB – Total column may not add as some centres contain units which have been categorised as 'other'.

Cambourne

- 7.6 Cambourne lies approximately eight miles to the west of Cambridge and serves a planned housing development which is expected to grow to a population of 7,000 by 2009 and 10,000 by 2012. Cambourne is still expanding and there are outstanding retail permissions which have not yet been implemented. These include a plot for a DIY store/garden centre and six further plots which it is anticipated will be developed to provide a more substantial high street offer with larger units attracting multiple retailers.
- 7.7 Although at present Cambourne is one of the smaller centres in South Cambridgeshire in terms of the number of units, the units are modern and likely to be bigger and better configured than those in the other rural centres which are predominantly converted residential properties.
- 7.8 The principle shopping provision in Cambourne is a modern Morrison's foodstore, which anchors the centre as well as providing a petrol station and large surface car park with over 500 spaces. Immediately adjoining Morrison's are two developments already built (Caxton House and W2). They comprise a high proportion of service uses including a public house, estate agents, a building society, takeaways and a restaurant. At present this area appears to be quieter than the Morrison's store.
- 7.9 There are a variety of other uses in Cambourne including a school, nursery, library, doctor's surgery, veterinary surgery and the centre provides a good range of services and facilities for local residents.

Cambourne has also been developing into an employment centre and there is a modern business park within walking distance of the town centre as well as a hotel. The modern environment is clean and a variety of different types of landscaping and a piece of public art create an attractive environment.

Fulbourn

- 7.10 Fulbourn lies four miles from the centre of Cambridge and despite its proximity to the urban area, it retains a rural character and comprises a range of shops and services serving the local community. Fulbourn has a high proportion of independent retailers and several specialist operators including a grand piano shop, an art gallery and an antique shop. It also has a Co-Op as well as an independent butcher and greengrocers. Fulbourn is the second smallest centre in South Cambridgeshire and the unit sizes are relatively small.
- 7.11 Fulbourn has an attractive and clean environment and retains a traditional village character. The majority of units are located in close proximity and the buildings are two storeys in height.

Great Shelford and Stapleford

- 7.12 Great Shelford and Stapleford is made up of two interconnecting centres, located four miles to the south of Cambridge City on the A1303. Several shops lie on the A1303 but the heart of the village centre is located away from the main road in a quiet environment where shops and services are interspersed with residential uses. The centre also has the Shelford railway station with local train services to Cambridge.
- 7.13 Great Shelford and Stapleford is an attractive village centre providing a range of traditional convenience shops and services, many of which are independents. The centre has a good convenience provision including a Spar, Co-Op and McColls newsagents; there is also an independent butchers, bakers and delicatessens. There are several independent comparison shops in the centre including a cycle shop and a ladies fashion shop. The centre benefits from a range of other uses and community services including a health centre, village hall and community centre with extensive sports facilities.

Histon and Impington

- 7.14 Like Great Shelford and Stapleford, Histon and Impington consist of two village centres that have gradually merged into one larger centre and are located to the north of Cambridge on the B1049. As a result there are clusters of retail uses in each centre both with a convenience anchor; Histon by a modern Tesco Express store and Impington by a Co-Op. There is also a range of other retailers, the majority of which are independents offering specialist goods and services such as a gift shop, toy shop and fire place shop. There is a good range of local services in both parts of the centre including banks, opticians, estate agents, restaurants and takeaways. Other uses include a doctors surgery, dentist and a vets and there is a cluster of offices and light industrial uses in Impington.

- 7.15 Histon and Impington is an attractive centre which benefits from several open spaces with large mature trees. Histon has an attractive village green with a pond which adds to the rural character of the centre. The majority of buildings in the centre are well maintained and shop fascias are generally in good condition. There is one car park at the rear of Tesco Express and the library as well as limited on-street parking.

Sawston

- 7.16 Sawston is the largest rural centre in South Cambridgeshire with a total of 57 units. Sawston has a less traditional character than many of the other centres in South Cambridgeshire which can be attributed to the mix of building styles including several infill additions.
- 7.17 Sawston's convenience offer is anchored by a good sized Budgens store, which is located in a brick built building fronting the high street and with a surface car park to the rear. There is also a smaller Spar and several independent retailers. Sawston has a good service offer including several takeaways and restaurants, hairdressers, banks and building societies. There is also a relatively high number of comparison operators such as a hardware shop, electrical shop, toy shop and a bookshop.

Willingham

- 7.18 Willingham is situated approximately 12 miles to the north west of Cambridge on the edge of the Fens. It is a medium sized centre with a total of 27 units and Willingham has the highest percentage of comparison units out of all of the centres in South Cambridgeshire. Comparison uses include a rug shop, gift shop, sewing shop and wedding dress shop and it is likely that these uses attract visitors to the centre from outside of the local catchment area.
- 7.19 Willingham has a good convenience offer comprising a Co-Op and One Stop, as well as an independent bakery and delicatessen. The village also provides a range of service uses such as a hairdressers, a takeaway and two national banks. Willingham is a traditional village which has experienced several in-fill residential developments, however these are all well designed and sympathetic to the character of the village.

Cottenham

- 7.20 Cottenham lies six miles to the north of Cambridge on the edge of the Fens. It is the fourth largest centre with a total of 37 units and has experienced significant population growth over the last twenty years, which supports a range of shops and services, as well as local community groups.
- 7.21 Cottenham's convenience provision is anchored by a Co-Op store, which is complemented by a Premier convenience store, as well as an independent butcher and baker. Cottenham has a fairly wide range of amenities in the village, including a GP surgery, a dental surgery, library, primary and secondary schools, the latter of which hves a sports centre and outdoor swimming pool. Cottenham is large enough to support some of the services not found in the other centres such as an Indian restaurant, a Travis Perkins, a car dealership and a branch of the Cambridge Building Society.

- 7.22 Cottenham is an attractive centre with several local landmark buildings that contribute to the individuality and character of the village. There is an attractive village green and war memorial where local events are held.

Linton

- 7.23 Linton is located to the south east of Cambridge close to the A1307 and has a total of 26 units for retail and service uses. It has expanded rapidly since the 1960s and has a population of approximately 4,410. Linton is an attractive village which is essentially in two parts, divided by the river. The presence of the river in the centre of the village is an attractive feature although access to the river appears to be restricted to private residential properties. There is a green area in the centre of the village close to the river with the village sign, which has recently been restored.
- 7.24 A mix of shops and services provide everyday facilities to local residents, as well as attracting shoppers and visitors from further a field. Service uses include three public houses, a Chinese restaurant and takeaway, hairdressers, barbers and opticians. There are several comparison shops including a gift shop and art gallery. The Co-Op sells a good range of everyday provisions, and there are two newsagents and an independent baker.
- 7.25 The village has a mix of other uses, including a large secondary school, Community Centre, Public library, Health Centre and Social Centre and dentist. There is also a large sports complex on the edge of the village. Linton Zoo is also located nearby.

Waterbeach

- 7.26 Waterbeach lies six miles to the north of Cambridge city close to the A10. It is one of the smaller centres in South Cambridgeshire with a total of 16 units. Nevertheless, Waterbeach provides a good variety of local shops and services. The convenience offer is anchored by the independent Waterbeach Village stores and there is also a One Stop. Other facilities include a pharmacy, hairdressers, two takeaways and four public houses as well as an active social club.
- 7.27 Waterbeach benefits from two interlinking village greens in the middle of the village which provide an attractive area of green open space with mature trees and landscaping, children's play equipment and the village sign. The green is overlooked by shops and residential properties. The majority of shops fascias are well maintained and add to the character of the village.

Bar Hill

- 7.28 Bar Hill is a purpose built centre approximately four miles to the northwest of Cambridge on the A14 and is effectively split into two parts with a total of 16 units. Bar Hill developed in the late 1950s to alleviate the housing shortage in South Cambridgeshire. The retail offer is dominated by a Tesco Extra store and its large surface car park, which was redeveloped in the late 1990s. The store is one of the largest Tesco stores in the country and draws trade from a wide catchment area. There is a parade of local shops adjacent to the Tesco store providing local services to local residents such as

a dry cleaner and building society as well as several national chains with larger catchments such as Next.

- 7.29 The other part of the Bar Hill centre is poorly linked with the Tesco store and provides local services such as a library, post office and health centre. The landscaping around Bar Hill is beginning to mature and the centre provides a relatively pleasant modern retail environment. There is an attractive area of open space by the library with flower beds and seating.

Papworth Everard

- 7.30 Papworth Everard lies ten miles west of Cambridge and six miles south of Huntingdon. Papworth Everard has experienced significant change over the last ten to fifteen years including the creation of a by-pass around the village and a large number of new houses, the current population is estimated at 2,410.
- 7.31 Papworth Everard is one of only a few centres in South Cambridgeshire to have a purpose built shopping centre. Pendrill Court is a small yet attractive two storey building providing space for a range of facilities. Commercial uses are located on the ground floor with office uses above. There is one vacant unit in the village centre, the former Five Star newsagents – this unit lies opposite Pendrill Court and is a large vacant unit in the village which offers an opportunity for a new retail/service use and/or redevelopment. The main convenience retailer in the centre is Nisa, a small shop selling a limited range of everyday convenience goods. Other uses include a pharmacy, hair dressers, café and estate agents.
- 7.32 Pendrill Court provides an attractive focal point in the village, it is a brick built building with pleasant open space to the front which is nicely landscaped with seating. There is also a very attractive area of open space close to Pendrill Court with a range of sports facilities. There are several new housing developments, but these appear to be well designed and in-keeping with the village and there is a good provision of open space.

Gamlingay

- 7.33 Gamlingay is a quiet village, situated approximately fifteen miles to the south west of Cambridge and serves a population of approximately 3,560 people in the village, as well as residents from outlying rural settlements. Gamlingay has a total of 20 units and just under half of these are service uses.
- 7.34 There is a Spar store, which provides a good everyday convenience offer and this is supplemented by an independent bakers and butcher/greengrocer. The village also has a good range of local services including a pharmacy and a bank, which reduce the need for residents to travel to other destinations for these services.
- 7.35 Gamlingay is an attractive village but it is considered that there could be scope to enhance landscaping and the street furniture, for example, by providing more seating. Gamlingay Parish Church provides an attractive focal point in the village. There is a mix of building types ranging from traditional village cottages to more modern in-fill developments. All of the shops and pubs have well

maintained fascias and add to the character of the village. Landscaping is limited to private properties.

Melbourn

- 7.36 Melbourn is situated just two miles north of Royston and 10 miles south of Cambridge and is bypassed by the A10. It is a popular and thriving village home to over 4,500 inhabitants. Melbourn has a total of 21 units, the majority of which are convenience and service uses. The village centre at Melbourn is less than one mile from the station at Meldreth, on the Cambridge to London King's Cross main line.
- 7.37 The Co-Op store anchors the village's convenience offer providing a good range of everyday essential items. There are two restaurants and a ladies clothing store on the edge of the village, which are likely to attract visitors and shoppers from further a field. Other uses include a building society, estate agents, hairdressers, several public houses and a post office.
- 7.38 Melbourn is an attractive village with the village green and church creating a traditional focal point for village activities. There are several large attractive properties in the centre of the village which add to its character and the Co-Op building is sympathetic to its surroundings. Several thatched cottages remain which add to the traditional charm of the village. The cluster of retail uses on the outskirts of the village benefits from an attractive location by the river.

Summary

- 7.39 Overall, it is evident that the rural and minor rural centres in South Cambridgeshire are performing their roles as local convenience and service centres very well. All have a good convenience provision and vacancy rates are low. The majority of centres are traditional 'village' centres which have become established over a number of years, with the exception of Cambourne which is a purpose built centre that has been developed over the last decade as part of a large residential area which is still evolving; Bar Hill which is dominated by a Tesco Extra store; and Papworth Everard which has a purpose built shopping centre that has developed as a result of significant housing growth.

8. OTHER RETAIL PROVISION

- 8.1 This section sets out our assessment of other retail provision across both local authority areas. It provides an overview of out of centre retail provision to help identify the location, scale, type and quality of provision in both local authorities and the potential competition with Cambridge city centre, the district and local centres in Cambridge City and the rural centres in South Cambridgeshire.

Out of Centre Convenience Stores

- 8.2 Plans 15-18 illustrate foodstore provision across the study area. There are a number of out of centre foodstores, which are listed below (Table 8.1) and we provide a brief qualitative summary. A more detailed quantitative assessment is provided in Section 10.

Table 8.1: Out of Centre Foodstores

Foodstore	Net Convenience Floorspace	2008 Turnover (£000s)
Tesco Extra, Bar Hill	4,696 sqm	£55,135
Tesco, Cheddars Lane	2,996 sqm	£27,073
Tesco, Yarrow Road	2,710 sqm	£34,908
Asda, Beehive Centre	2,601 sqm	£14,310
Sainsbury's, Coldham Lane	2,986 sqm	£42,155
Waitrose, Trumpington	2,678 sqm	£42,198
Tesco Milton	2,211 sqm	£50,046

Source: GVA Grimley/IGD

- 8.3 The **Tesco Extra at Bar Hill** opened in November 2000 and is located off the A14 to the north of Cambridge in South Cambridgeshire District. It is a freestanding hypermarket store, but there is a parade of ancillary retail units located adjacent to Tesco providing local shops and services such as a takeaway, estate agent and building society, as well as a Next store. There is a large surface car park to the front of the store and a petrol station. The store has a floorspace of 9,392 sqm net and approximately half of the floorspace is used for comparison goods including clothing, small and large electrical items and home and garden products. There is also a mezzanine. The store is open 24 hours a day and sells a wide product range and has an extensive selection of fresh food counters. It also has a café, opticians and pharmacy.
- 8.4 **Tesco, Cheddars Lane** opened in August 2002 and is located in an out of centre location off Newmarket Road. It is on the opposite side of the road from the Cambridge Retail Park, in an area surrounded by light industrial and residential uses in Cambridge City local authority area. The store has a retail floorspace of 4,993 sqm net and approximately 40% of the floorspace is used for comparison goods. The store is open 7.30-22.00 Monday – Saturday and 11.00 – 17.00 Sunday and has a large surface car park to the front of the store.

- 8.5 **Tesco, Yarrow Road** opened in June 1997 and is a free standing store built on part of the former Fulbourn hospital site in South Cambridgeshire District. The surrounding uses are mainly residential to the west, with the current hospital to the east. The store has a floorspace of 3,613 sqm net and approximately 35% of the floorspace is used for comparison goods. The store is open 24 hours a day and offers a café and pharmacy as well as various fresh food counters. There is a large surface car park to the front of the store.
- 8.6 **Asda, Beehive Centre** is located just off Newmarket Road adjacent to other retail warehouses at the Beehive Centre. It lies in close proximity to the Cambridge Retail Park and Tesco at Cheddars Lane. The store opened in 2002 and has 3,716 sqm net of retail floorspace with approximately 30% devoted to the sale of comparison goods such as clothing, jewellery, electricals and homeware items. The store is open until midnight on weekdays and until 10pm on a Saturday.
- 8.7 **Sainsbury's, Coldham Lane** lies to the south east of Cambridge city centre and is located close to the A1134. The store opened in 1974 contain 4,265 sqm net retail floorspace with approximately 30% devoted to comparison goods such as homeware, clothing, electrical items, books and home entertainment products. There are various fresh food counters and a customer café. There is also a petrol station and a large surface car park. The store operates until 10pm every day apart from Sundays.
- 8.8 **Waitrose, Trumpington** lies to the south of Cambridge on the outskirts of Trumpington. Waitrose is a modern pleasant store which opened in 2000. The store has 2,976 sqm net of retail floorspace with approximately 10% devoted to comparison goods. There is a large surface car park and a café.
- 8.9 **Tesco, Milton** opened in March 1989 and is the oldest Tesco store in the sub region located in South Cambridgeshire District. It is a free-standing store adjacent to the Cambridge Road Industrial Estate with residential uses to the rear. The store has 2,327 sqm net of retail floorspace and only a small proportion of this floorspace is used for comparison goods. The store is open 24 hours and has a café and pharmacy. There is also a petrol station and a large surface car park at the front of the store.

Retail Warehouses

- 8.10 The main area of retail warehousing in the study area is on the Newmarket Road where there are two adjacent retail parks, namely the Beehive Centre and the Cambridge Retail Park. There are also several standalone stores; B&Q, Newmarket Road, Comet, Newmarket Road and Focus on Tenison Road (see Plan 19).
- 8.11 The Beehive Centre opened in 1994 and is a purpose built retail park with box style units looking out onto a large surface car parking. The majority of the units in the centre benefit from open A1 consent. The main units operating in the centre are Rosebys, TK Maxx, Toys R Us, Carpetright, JJB Sports, Allied Carpets, Homestore & More, Harveys, Conway Pine, Pets at Home and Maplin. There are presently two vacant units which are under going refurbishment.
- 8.12 Cambridge Retail Park opened in 2000 and is a typical retail park albeit slightly more modern than the Beehive Centre. The park benefits from open A1 consent which in recent years has led to a
-

number of units being occupied by traditional high street retailers. Current operators include Currys, Homebase, ScS, PC World, Argos, Sports World, Burton/Dorothy Perkins/Evans, Halfords, Furniture Village, Habitat, MFI and Multiyork. Both retail parks have a pleasant environment and are well maintained. Shop fascias are in good condition and have been modernised.

- 8.13 Our analysis of the retail warehouse provision indicates a total floorspace of 38,695 sqm net in Cambridge City. There is no retail warehouse provision in South Cambridgeshire. The only out of centre comparison goods provision is at the Tesco Extra, Barhill. We have categorised the provision by floorspace and it is evident that the majority of floorspace is in DIY and furniture (Table 8.2). These are traditional retail warehousing bulky goods uses and therefore town centre type retailers are not dominating the out of centre provision in Cambridge.

Table 8.2: Out of Centre Retail Warehousing

Category	Net Floorspace (sqm)	Percentage of Total Retail Warehousing Floorspace (%)
Carpet	1,536	4
Cars	745	2
Chemist	790	2
Clothes	2,334	6
DIY	9,173	24
Electronics	5,542	14
Furniture	9,772	25
Mix	792	2
Pets	461	1
Sports	1,738	4
Stationary	2,524	7
Toys	1,412	4
Vacant	1,877	5

Source: GVA Grimley

- 8.14 The adopted Cambridge City Local Plan notes that there is an over supply of retail warehousing and there is a presumption that no new retail warehousing will be permitted. Policy 6/9 of the adopted Cambridge Local Plan states that retail warehouse development will only be permitted if it is for the modernisation or replacement of existing retail warehouses with less than or the same floorspace as before. In the last five years, Cambridge City Council have come under increasing pressure from retail warehouse owners and operators seeking to modernise and replace existing units. The Council recognise that there is a requirement to undertake such works, but where permission is granted, they must seek to control the types of goods that can be sold in order to protect the vitality and viability of the city centre and other town centres.

Summary

- 8.15 It is evident that there is a good provision of out of centre foodstores in both Cambridge City and South Cambridgeshire local authority areas. It is apparent that Tesco have a strong presence of out of centre foodstores operating four large stores in the sub region which sell a wide range of non-food goods and offer services such as opticians, pharmacy and customer cafés. Waitrose, Sainsbury's and Asda are also represented. All of the out of centre stores benefit from large customer car parks.
- 8.16 All of the retail warehouses in the sub region are clustered on Newmarket Road in Cambridge City Council local authority area. There are two retail parks here, along with several standalone stores. The retail parks are relatively modern and provide a pleasant shopping environment with free car parking, which makes them attractive to customers from across the sub region. Whilst the majority of floorspace is in bulky goods uses, in recent years the number of traditional 'high street' retailers locating on the parks has increased. It will be essential that Cambridge City Council monitor applications and exert control to protect the vitality and viability of the City Centre.

9. LEISURE PROVISION

9.1 The following sets out our assessment of the growth in leisure expenditure over the forecast period and the potential need for new commercial leisure uses and facilities within the sub region, and specifically Cambridge city centre. Unlike for retail capacity assessments, the methodologies for assessing the quantitative need for new leisure floorspace are less developed and robust. For this reason we have used both quantitative and qualitative approaches to assess need across the sub region. We have also, where appropriate, provided an overview of national trends to provide a better understanding of the relative viability and performance of the different categories. This helps to provide a better understanding of the potential market interest and key drivers of development at the local level. Plan 20 shows leisure provision for the sub region.

(i) Growth in Leisure Expenditure, 2008 – 2021

9.2 The Experian '*E-marketer*' report calculates annual consumer leisure expenditure per person on leisure and recreation goods and services (2006 price base), based upon a demographic profile of the catchment area. Leisure expenditure as defined by Experian includes recreation and sporting services, cultural services, games of chance, cafés/bars/restaurants, accommodation services and hairdressing salons and personal grooming establishments.

9.3 We have projected available leisure expenditure per capita up to 2021, based on the population projections from the study area, and assumed an 'ultra long term' growth rate in available expenditure of 2.4% per annum for leisure goods. This 'ultra long term' growth rate figure is derived from Experian Business Solutions.

9.4 The annual average consumer expenditure per person on leisure goods in the catchment is currently estimated to be £1,971 (2006 prices). Per capita expenditure is projected to increase to £2,683 by 2021 (see Table 9.1). At present (2008) per capita expenditure on leisure goods in the study area is above the national average.

Table 9.1: Per Capita Leisure Goods Expenditure Adjustments – Total study area

2008 (£)	2011 (£)	2016 (£)	2021 (£)
1,971	2,117	2,383	2,683

Source: Experian Business Solutions, Emarketer, 2008

9.5 If we apply the per capita goods expenditure to the total population of the catchment area, it highlights that there is currently £1,785m available leisure expenditure in the catchment area. This is expected to rise to over £2,747m by 2021 (Table 9.2).

Table 9.2: Total Leisure Expenditure catchment area

	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
Total Catchment	1,785,454	1,997,044	2,361,034	2,747,477

Source: Experian Business Solutions, Emarketer, 2008

9.6 The demand for additional quality leisure facilities will naturally grow as the population increases within the catchment area. The existing designated centres in Cambridge City and South Cambridgeshire District should remain the main policy focus for leisure growth, specifically Cambridge city centre. Leisure provision should also come forward as part of the development of a new centre at Cambridge East.

9.7 It is proposed that the new town centre of Northstowe will have a mix of leisure uses including a hotel, indoor leisure facilities, health and fitness facilities and a cinema. The Northstowe Town Centre and Local Centres Strategy (prepared by the developer) provides the following indicative quantum of floorspace for leisure uses in Northstowe town centre:-

- 8,000 sqm for a hotel with approximately 180 bedrooms.
- 6,400 sqm for a community meeting centre/library/public offices/arts centre/health.
- 2,500 sqm for D2 Sui Generis uses such as indoor leisure, health and fitness, casinos and nightclubs. The scale is based on an average health and fitness facility size of 1,500 sqm.
- 5,000 sqm cinema with approximately 1,350 seats. A generous scale has been given to enable a range of possible concepts from upmarket to multiplex and it is likely that this will be developed in the later phases.

9.8 The Town Centre and Local Centres Strategy notes that there is a limited provision of indoor leisure and health and fitness operators in the surrounding area and thus there is sufficient demand to support a health and fitness facility equivalent to a Fitness First or Esporta, on average up to 1,600 sqm. It also states that there may also be sufficient demand to support a centre with a more extensive leisure provision such as David Lloyd with indoor tennis courts and a swimming pool in the region of 7,400 sqm. The strategy also notes that management arrangements will be put in place to ensure the dual-use of leisure facilities in schools and links with hotel leisure facilities.

(ii) Cinema Provision

9.9 According to Dodona Research (2006), the number of new cinema screen openings has slowed significantly over recent years, following a period of dramatic growth during the 1990s. During this period there was a significant increase in new multiplex cinema developments, primarily in out of centre locations, either as stand-alone schemes or as anchors to leisure parks.

9.10 The slowdown in development is partly explained by the Government's town centres first policy, which has effectively curbed new multiplex cinema and commercial leisure developments in out of centre locations. Although there has been a resultant increase in investment in smaller cinemas in

town centre locations, multiplexes have maintained and increased their share of cinema screens to 73% (i.e. the number of cinemas has decreased but the number of screens has increased). Research indicates that there are now approximately 200 single screen cinemas in the UK and only 16% of all cinemas have less than four screens.

- 9.11 According to Dodona, the number of multiplex cinemas (and screens) opened in 2005 was the lowest since 1987. The latest research indicates an increase in openings in 2006, with eight new multiplexes planned comprising 64 screens. Although Dodona forecast an increase in new investment and development over the short term, the growth will continue to be modest compared with previous trends due to the increase in sophisticated home entertainment systems, digital television and other technological advances.
- 9.12 The household survey identified that some 45% of people in the survey area visit a cinema. Cinema trips vary across the study area, with the highest trip rate in Zone 2 (57%) and the lowest in Zone 8 (25%). Table 9.3 below shows that, at present, the Cineworld in Huntingdon is the most popular cinema in the survey area, attracting 22.7% of cinema trips. Cambridge attracts the second highest provision with 19.7% indicating that they use the Cineworld at the Cambridge Leisure Park on Clifton Way, and a further 12.6% using the Vue cinema in the Grafton Centre and 9.9% using the Picturehouse cinema. 3.1% state that where they visit the cinema varies.

Table 9.3: Most Dominant Cinema Destinations

Cinema	No. of Screens	Market Share (%)
Cineworld, Huntingdon	10	22.7%
Cineworld, Cambridge	9	19.7%
Vue Cinema, Grafton Centre, Cambridge	8	12.6%
Picturehouse, Cambridge	3	9.9%
Cineworld, Bury St Edmunds	8	7.1%
Cineworld, Braintree	12	4.5%

Source: Household Telephone Survey, March 2008 and Dodona Research, 2006

- 9.13 In terms of the leisure offer at Northstowe, the proposed size of the cinema would give scope for development of up to 15 screens. The Northstowe Town Centre and Local Centres Strategy indicates that alternatively there may be an opportunity to capitalise on the trend towards development of smaller boutique cinemas. The cinema will come forward towards the latter stages of the town centre development.
- 9.14 With a new 15 screen cinema at Northstowe it is likely that no further screens would be needed over the LDF period. If this does not happen then the need for further cinema provision will be determined by market interest and demand.

(iii) Ten-Pin Bowling

- 9.15 Tenpin bowling has been established as a commercial leisure activity in the UK for over 40 years, but after a period of growth in the 1980s, decline set in during the early 1990s. Since then, however, a spate of investment in new centres and refurbishments by recognised chain brands has revitalised the industry to a degree.
- 9.16 Mintel research (2006) has identified an increase in development of high-end quality venues in central locations. However, long term attraction and viability of this sector of the commercial leisure market will depend on increasing its appeal to a wider demographic and providing a more sophisticated eating/drinking offer.
- 9.17 There are more recent signs that the concept is already beginning to evolve to generate increased customer interest and visits. For example, the Bloomsbury Bowl Lanes in London offers a very popular 1950s American themed bowling venue with ancillary karaoke rooms, venue rooms for hire, DJ booths, bars, small scale cinema and a venue for bands and live performers/comedy nights. This more integrated leisure/entertainment experience, could represent the way forward for this sector of the market.
- 9.18 The household survey identified that 19.9% of people across the survey area partake in ten-pin bowling. There are several bowling alleys in the study area. The Tenpin facility at the Cambridge Leisure Park is the only bowling facility in Cambridge and attracts 30.4% of respondents. 11.4% go to the Strikes Bowling Centre in Ely and 8.5% go to the Eat N Bowl at Huntingdon. We consider that if there is market interest and demand for an additional ten pin bowling facility in Cambridge then this should be encouraged. All sequential sites should be explored within the defined centres before any out of centre sites are considered.

iv) Health & Fitness Clubs/Swimming Pools

- 9.19 According to Mintel's research report on UK Health and Fitness Clubs, the value of this sector increased by 62% between 1998 and 2002 (at current prices). In real terms the growth was a substantial 49%. The growth of this sector has been driven by a number of factors, including significant changes in lifestyles and resultant shift away from competitive sports towards those focused on personal health and fitness development.
- 9.20 The expansion of this sector has continued in recent years, although growth has been characterised by significant consolidation in the industry. For example, Virgin Active recently took control of the Holmes Place leisure clubs. The industry is forecast to remain strong throughout this decade and beyond as personal health and fitness awareness continues to develop.
- 9.21 We have assessed health and fitness club provision and usage in the sub region. Cambridge city centre has the greatest concentration of facilities which is to be expected given its catchment population, however several of the smaller rural centres in South Cambridgeshire benefit from local

authority run leisure centres and community sports facilities. The household survey indicates that approximately 17.9% of respondents take part in gym/health and fitness clubs and an additional 1% partake in swimming. Of those total respondents, Cambridge is the most popular destination, with a market share of 19.9% for gym/health and fitness facilities, followed by Huntingdon with a market share of 9%. It is unclear whether people are referring to facilities in the city centre or in the smaller district and local centres but this could be likely as gyms/health & fitness clubs/swimming pools tend to have a much more localised catchment than some of the other leisure facilities such as cinemas.

- 9.22 In terms of planning for further facilities, we advise that health & fitness clubs should be encouraged, ideally as part of more comprehensive mixed use retail/residential scheme, within existing designated centres. The need for this type of leisure activity will also be determined by market interest and demand.

(v) Evening Economy Offer

- 9.23 According to the household survey some 39.5% of respondents visit pubs and clubs in the study area. Unsurprisingly, given the level of provision, Cambridge city centre is the most popular destination with a 23.6% market share. As expected, the majority of respondents use the town centre within Zones 1 and 2 with a market share 78.3% and 80.6% respectively. Huntingdon and Newmarket attract a market share of 4% and 4.6% respectively from the survey area. When asked what would make respondents visit Cambridge more often in the evenings, the most popular responses were better/cheaper parking (6.7%), more evening entertainment (5.6%) and better public transport (5.3%). Almost 70% of respondents stated that 'nothing' would make them visit Cambridge more often in the evenings, perhaps indicating that those people already visiting Cambridge are happy with the evening entertainment offer.
- 9.24 The household survey results suggest that a relatively high proportion of people from Zones 1 and 2 choose to travel to Cambridge city centre in the evening for a variety of leisure activities. It is important, however, that the district, local and rural centres maintain and enhance their provision of pubs, restaurants and other attractions to maintain a healthy economy and meet the needs of their local catchment populations in a more sustainable manner. Given the size and role of these centres, they should not be expected to compete with the city centre in terms of its larger commercial leisure and 'branded' offer, but there could be opportunities to develop and/or expand their specialist/niche offer.
- 9.25 There may be opportunities for improvements in the city centre which would be beneficial to the night time economy, for example, examining the possibility of reconfiguring the Market Square to reduce crime and anti-social behaviour and make the area safer in the evening and, in parallel, promote a 'European café culture' with outside seating. There may also be opportunities to improve evening bus services and extend park and ride running times later into the evening.

(v) Restaurant/Café Expenditure

- 9.26 According to Experian Business Strategies (2008) the average person in the catchment area spends £1,159 per annum in restaurants/cafés. Experian also estimate that people's average spend on leisure goods, such as eating out, is increasing by 2.4% each annum. Currently the total expenditure available for restaurant/cafés in the study area is £1,049.3m. This is forecast to increase to £1,614.7m in 2021, as shown by Table 9.4.

Table 9.4: Restaurant / Café Expenditure Forecasts – Total Catchment

Projection	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
Total Catchment	1,049,295	1,173,644	1,387,557	1,614,667

Source: Experian Business Solutions, Emarketer, 2008

- 9.27 This does not in itself justify a more flexible policy with regard to primary shopping frontages. We advise that A1 shop uses should continue to be protected to underpin the vitality and viability of Cambridge city centre, as well as the district and local centres and the rural centres in South Cambridgeshire, particularly when considered in the context of the forecast capacity for new comparison goods floorspace.
- 9.28 However, we consider that it is appropriate to maintain the more flexible policy approach elsewhere in the city centre and district and local centres, enabling the representation of A3 and A4 uses which can enhance the vitality and viability of the centre and encourage longer trip times. Tighter control of A5 (hot food/take away) uses may be appropriate for amenity and environmental reasons.
- 9.29 On this basis, our assessment highlights sufficient growth in the study area to sustain circa 43.2% growth in this sector by 2021. Clearly the profile of the catchment population, in relation to the proportion of managerial and professional persons, will determine the location, scale and quality of restaurants/cafes in the catchment area.

Summary

- 9.30 Our leisure expenditure projections have identified significant growth in the leisure sector across the study area. Given that the Government's objective is to maintain and enhance the vitality and viability of town centres, we recommend that the strong growth in leisure expenditure should be directed to defined centres in the sub region.
- 9.31 Our assessment of the leisure sector in the Cambridge sub region indicates a relatively good provision and choice of commercial leisure facilities. It is apparent that much of this provision is in or on the edge of Cambridge city centre. In comparison, the provision of commercial leisure facilities in the smaller district, local and rural centres is significantly less, which is to be expected given their smaller catchment populations and role geared towards more convenience and service retailing and providing community based leisure facilities.

- 9.32 It is important that the smaller centres, as well as the city centre, maintain and enhance their provision of pubs and restaurants and other leisure facilities to encourage a healthy evening economy and meet the needs of their catchment populations. However, given the relative size and role of these centres, we do not consider that they will be able to compete directly with the city centre as locations for major commercial leisure uses and floorspace. There may, however, be opportunities to develop and/or expand their specialist/niche offer, to complement the city centre's role and attraction within the wider study area.

10. QUANTITATIVE ASSESSMENT: BASELINE

- 10.1 In this section, we estimate the current performance of both Cambridge City and South Cambridgeshire's retail provision, as a basis for forecasting the capacity for additional retail floorspace in the period to 2021. The capacity tables accompanying this assessment are attached in Appendices 6 and 7.
- 10.2 We have used a conventional and widely accepted step-by-step methodology, consistent with best practice, which draws upon the results of the household telephone survey of existing shopping patterns and the bespoke in-centre surveys to model the existing flows of available expenditure to different retail destinations. To develop the baseline position, we have:-
- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising the Cambridge survey area;
 - Allocated the available expenditure to the convenience and comparison goods shopping destinations, on the basis of the household telephone survey of shopping patterns, so as to provide estimates of current sales and forecasts of future sales;
 - Compared the total expenditure attracted to each shopping destination with current retail floorspace to assess sales densities in each shopping destination.
- 10.3 Building on the baseline position, we have explored the global capacity for further convenience and comparison goods retail floorspace within the sub region for each local authority. We have also tested a series of growth scenarios. Scenario testing is encouraged through current best practice to allow local authorities to plan positively in response to changing economic circumstances over forthcoming LDF periods.

Data Inputs

i) Survey Area and Household Survey

- 10.4 In order to provide detailed factual baseline information on shopping patterns in both Districts, we commissioned a new household telephone survey covering 2,000 households. GVA Grimley designed the survey questionnaire in consultation with Council Officers and Research and Marketing – who undertook interviewing and data processing. The survey area is illustrated on Plan 2.
- 10.5 The survey results identify shopping habits of households for both convenience and comparison goods. Where necessary, the survey results have been re-based to remove certain responses, such as 'internet/mail order shopping', to ensure consistency with categories excluded in the expenditure projections. For convenience goods, the household telephone survey included questions on main food and top-up food shopping. The results of the two types of food expenditure were then merged through the application of a weight, which reflects the estimated proportion of expenditure accounted for by each type. For food we use a 75%/25% main to top-up food weighting, which is widely
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accepted and used in retail planning studies. This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore, for each survey zone.

10.6 The survey also includes six questions on specific comparison goods types, which coincide with Experian Business Strategies definitions of comparison goods expenditure. The retail and needs modelling exercise uses the weighted averages of the household survey responses for each goods type based on the proportion of per capita expenditure on that goods type. This process establishes the pattern of spending for residents of each zone in terms of the following types of goods:-

- Clothes and shoes;
- Furniture, floor coverings and household textiles;
- DIY and decorating goods;
- Domestic electrical appliances;
- TV, hi-fi, radio etc ; and
- Personal, luxury goods and recreational goods.

ii) Internet Sales/E-tailing

10.7 For the purposes of the quantitative capacity forecasting, we have deducted Special Forms of Trading (SFT), which includes mail order and internet based sales, from expenditure per capita figures for convenience and comparison goods. We consider that the proportion of expenditure accounted for by SFT will increase over the period 2008 to 2021, based on Experian Business Strategies research into Internet sales. For convenience goods, they forecast a rise in this sector from 2% in 2006 to 4% by 2016 remaining at this level until 2021 (Table 2, Appendix 5) and for comparison goods they forecast a rise from 7% in 2006 to 12.5% by 2016 remaining at this level until 2021 (Table 2, Appendix 6).

10.8 We have not undertaken scenario testing to assess the potential impact of the growth of e-tailing on the capacity for new convenience and comparison goods floorspace. We recommend that strategies for town centres should focus on enhancement, the mix of uses and overall visitor experience to compete effectively with the growing competition of the internet. It is difficult to predict the future, but at present investor confidence in town centres remains strong despite the current economic climate. We nevertheless acknowledge that the capacity figures outlined throughout the remainder of this section could decline marginally as a consequence of the growth in internet sales. We therefore recommend that local authorities should follow the recommendations set out in PPS6, and update the evidence base and forecasting in the latter part of the LDF to take on board more detailed research evidence on the subject of SFT.

iii) Estimates of Population in the Survey Area

- 10.9 To establish the baseline at 2008, population estimates were prepared for each survey zone from the Experian E-marketer system. This provides estimates of population based on trend-line projections and the 2001 census for small, localised areas.
- 10.10 The population projections for the survey zones in the local authority areas of Cambridge City and South Cambridgeshire District were then taken from the Mid 2006 population forecasts produced by the Research Group at Cambridgeshire County Council. These set out population projections for each of the wards in each local authority between 2006 and 2021. We have translated the wards into the survey zones used in the Retail Study to estimate the population in each of the test years for each survey zone. As the survey zones and ward boundaries do not directly correspond we have used growth rates rather than the actual figures. The growth rates were applied to the Experian baseline position at 2011, 2016 and 2021. It should be noted that the survey zones covering the local authority areas do not exactly match the local authority boundaries as the survey zones are made up of postcode sectors. As such the population estimates and projections for each District do not exactly reflect the County population figures.
- 10.11 The Cambridgeshire County Council projections take into account future housing allocations and subsequent population growth. The East of England Plan requires 19,000 homes be provided in the Cambridge City Council area between 2001 and 2021. In addition South Cambridgeshire District Council is required to provide 23,500 homes. This could therefore result in a population increase of over 100,000.
- 10.12 The population of the survey area is currently 905,683. It is forecast to grow to 943,442 by 2011, 990,672 by 2016 and 1,023,911 by 2021 (Table 1, Appendix 5 and 6). Overall, population is forecast to grow by 13.1% between 2008 and 2021 across the entire survey area.

iv) Available Expenditure in the Survey Area

- 10.13 The Experian E-Marketer System provides estimates of the per capita expenditure for convenience and comparison goods in 2006 prices. As outlined above we have made deductions for special forms of trading. We have applied individual per capita expenditure figures across each survey zone to provide a more detailed understanding of available expenditure in different parts of the catchment area.
- 10.14 In terms of expenditure growth, we have drawn on convenience and comparison goods growth rates provided by Experian Business Strategies. These indicate that more growth will take place on comparison goods as opposed to convenience goods. This is because the scope to purchase more food is more limited than the scope to purchase non-food goods. Experian Business Strategies estimate a convenience goods growth rate of 0.7% per annum and a comparison goods growth rate of 3.8% per annum. We have generated expenditure by zone to highlight variations across the survey area (Table 2, Appendix 5 and Table 2, Appendix 6).
- 10.15 Table 3, Appendix 5, applies per capita convenience goods expenditure within each zone to population forecasts. This shows that total available convenience goods expenditure within the

survey area is currently £1,533m. This is forecast to grow to £1,618m by 2011, £1,745m by 2016 and £1,869m by 2021, which represents an overall growth of approximately £336m (22%) between 2007 and 2021.

- 10.16 In terms of comparison goods, total available expenditure within the survey area is currently £2,820m, and is forecast to increase to £3,219 by 2011, £3,990m by 2016 and £4,972m by 2021. This equates to an overall growth of £2,152m (76%) between 2007 and 2021 (Table 3, Appendix 6).

v) Floorspace Data

- 10.17 The comparison and convenience floorspace data used in our modelling has been drawn from a range of data sources including the Institute of Grocery Distribution (IGD), Cambridge City Council, South Cambridgeshire District Council, the Trevor Wood Retail Warehouse database and Experian Goad. Our floorspace assumptions for the foodstores include, where appropriate, an adjustment to identify the proportion of purely convenience goods floorspace. Most superstores include a proportion of non-food floorspace; and we have therefore adjusted the net floorspace to identify the proportion of sales space allocated for convenience goods. This accords with the expenditure data and the expenditure assumptions used.

Convenience Goods Assessment

- 10.18 Addressing each of the main town centres and out of centre destinations in the sub region, we have reviewed shopping patterns and the performance of existing convenience goods floorspace. Using the composite market shares derived from the household survey and baseline expenditure estimates, we have calculated the convenience goods turnover of the main convenience provision in each local authority area.
- 10.19 The following analysis reviews the performance of the main foodstores identified by the results of the household telephone survey, by comparing each store with expected company average sales densities, in accordance with PPS6 (see Tables 10.1 and 10.2 below).

Cambridge City Council

Table 10.1: Current Trading Performance of Convenience Floorspace for Cambridge City Council

Foodstore	2008 Turnover (£000s)	Company Average Sales (£000s)
Sainsbury's, Sidney Street	£15,076	£12,275
Other Convenience Stores	£19,587	£24,281
Total Cambridge City Centre	£34,662	£36,556
Tesco Express, Cherry Hinton	£2,704	£3,159
Tesco Express, Campkin Road	£6,486	£2,463
Aldi, Histon Road	£10,381	£2,409
Iceland, Histon Road	£859	£2,307
Co-Op, Hills Road	£8,091	£1,386
Co-Op, Histon Road	£3,039	£2,293
Budgens, Adkins Corner	£3,237	£1,632
Budgens, Arbury Road	£1,567	£2,505
Co-Op, Milton Road	£1,843	£888
Co-Op, Mill Road	£2,639	£3,282
Total District and Local Centres	£40,846	£22,323
Tesco, Cheddars Lane	£27,073	£34,466
Asda, Beehive Centre	£14,310	£37,332
Sainsbury's, Coldham Lane	£42,155	£29,091
Waitrose, Trumpington	£42,198	£31,072
Total Out of Centre	£125,736	£131,961
TOTAL CAMBRIDGE	£201,244	£190,840

Source: GVA Convenience Capacity Modelling, Appendix 5.

i) Cambridge City

- 10.20 In total, we estimate that the convenience stores in Cambridge city centre have a turnover of £35m. If all stores traded at company average levels, the turnover would be £37m. Therefore, according to the survey, for convenience goods, Cambridge city centre is performing adequately, broadly in line with company average levels.
- 10.21 Our analysis indicates that the Sainsbury's store is trading at above average levels and the survey may have under-estimated the turnover as the store will benefit from student trade during term time. The Sainsburys store draws most of its trade from zones 1, 2, 3, 5 and 6. Both Marks and Spencer stores are performing less well in relation to company average turnovers. However, this is likely to be due to the nature of the survey questions which focus on main food shopping and from our site visits both M&S stores were busy and appeared to be trading well. The M&S stores draw their trade from zones 1-4, which covers the urban area of Cambridge.

ii) Cambridge Local and District Centres

- 10.22 We estimate that the main foodstores in the local and district centres have a combined turnover of £41m, which is significantly higher than the turnover of all the stores at company average levels,

(£22.3m). There are several stores which are trading significantly above average such as the Aldi at Histon Road with a turnover of £10.2m, compared to the company average of £2.4m. There are very few deep discounter foodstores in the Cambridge sub region and Aldi is attracting market share from across the survey area. Other stores performing well include Tesco Express Campkin Road and Co-op Hills Road. Overall, many of the local foodstores are performing well, highlighting their role as important 'top-up' food destinations for local residents.

iii) Cambridge Out of Centre

- 10.23 The household telephone survey identified the use of four out of centre foodstores in Cambridge city local authority area which collectively turnover over £126m, compared to a company average of £132m. Waitrose at Trumpington is performing very strongly with a turnover of £42.2m compared to a company average £31m, this reflects Cambridge's affluent catchment, its high-end offer and the fact that this is the only Waitrose store in the Cambridge urban area. Sainsbury's at Coldham Lane is also performing strongly with a turnover of £42.2m compared to the company average of £29m.
- 10.24 Asda at the Beehive Centre is under performing with a turnover of £14.3m compared to the company average level of £37m, this is surprising given that this is the only Asda store within the sub region, however it could reflect Asda's location at the Beehive Centre where traffic can become congested and competition from the Tesco store located close by at Cheddars Lane. Tesco Cheddars Lane is also under trading which can perhaps be attributed to the fact that there is a wide range of other Tesco stores for customers to choose from; Cheddars Lane is on one of the main routes into the city centre and can become congested at peak times; and the store is not immediately visible from the main road.
- 10.25 It is likely that the Household Telephone Interview Survey has under estimated the turnover of the Asda, Beehive Centre. The quantitative assessment is not a precise science, rather using market shares from the Household Survey provides the best estimate of the turnover of the foodstores in the Cambridge sub region. We have contacted Asda to see if they can provide any further details on the performance of their store. The Tesco performance is comparative with the turnover identified in work carried out in Cambridge in 2006 for Tesco Stores Ltd.

South Cambridgeshire District Council

- 10.26 Table 10.2 below summarises the convenience turnover of the main foodstores in South Cambridgeshire based on the results of the household survey and benchmark turnovers based on company averages.

Table 10.2: Current Trading Performance of Convenience Floorspace for South Cambridgeshire District Council

Foodstore	2008 Turnover (£000s)	Company Average Sales (£000s)
Morrisons, Cambourne	£23,119	£30,087
Budgens, Sawston	£4,622	£2,191
Spar, Sawston	£601	£1,876
Tesco Express, Histon	£4,577	£2,695
Co-Op, Great Shelford	£2,793	£990
Co-Op, Fulbourn	£2,125	£2,063
Total Rural Centres	£37,837	£39,900
Tesco, Bar Hill	£55,135	£51,976
Tesco, Milton	£50,046	£28,934
Tesco, Yarrow Road	£34,908	£31,693
Total Out of Centre	£140,089	£112,603
TOTAL S.CAMBS	£177,926	£152,504

Source: GVA Capacity Modelling, Appendix 6.

i) South Cambridgeshire Rural Centres

- 10.27 In total we estimate that the rural centres in South Cambridgeshire have a turnover of approximately £37.8m. If all stores traded at company average levels, the turnover would be £39.9m. The largest foodstore in the South Cambridgeshire centres is the Morrisons store at Cambourne, which is trading below company average levels. All of the other foodstores which anchor the more traditional rural centres are performing very well with the exception of the Spar store in Sawston, which has a turnover of £0.6m compared to the company average of £1.9m. The strong performance of these stores can be attributed to their vital role as locations for everyday provisions.
- 10.28 It should also be noted that many of the rural centres have a range of other smaller independent convenience retailers which we have not been able to model because of the very small market shares derived from the telephone survey results. However, our qualitative observations have revealed that independent retailers appear to be performing well and contribute greatly to the village character of many of the centres.

ii) South Cambridgeshire Out of Centre

- 10.29 There are three out of centre foodstores in South Cambridgeshire, all of which are operated by Tesco. The results of the household telephone survey reveal that the Tesco store at Milton is performing very well with a turnover of approximately £50m compared to the company average of £29m. The other two Tesco stores, at Bar Hill and Yarrow Road are performing at average levels according to the survey results. In reality, the Bar Hill store may be performing better but this has not been identified by the survey as it focuses on main food shopping and may not have picked up less frequent but higher spend shopping trips.

Baseline Convenience Goods Capacity Forecasts

- 10.30 We have examined the capacity for further convenience goods floorspace at the global level for each of the local authority areas up to 2021 (incorporating the interim years of 2011 and 2016). It is important to note that capacity forecasts become increasingly open to margins of error over time and should be updated over the LDF period.
- 10.31 The forecasts for global capacity will enable both local authorities to test alternative options for the spatial distribution of new development. By forecasting at the local authority level, each Council can make informed policy choices about where that capacity should be met depending on a whole range of other considerations such as site availability and public transport accessibility. Capacity arising in a specific centre does not necessarily mean that the identified capacity should be met within that centre. A more appropriately located site in a nearby centre may encourage, for example, more sustainable travel patterns.
- 10.32 In terms of convenience commitments coming forward in the future, we have considered the following schemes as provided by the Councils:
- Cambridge City**
- 11 High Street, Cherry Hinton
 - 186 – 188 High Street, East Chesterton
- South Cambridgeshire**
- Land at Arbury Camp, Impington
 - 23 Church Street, Willingham
- 10.33 In order to translate residual convenience goods expenditure into floorspace, we have assumed that mainstream foodstore operators would aim to achieve average sales densities in the region of £10,000 per sqm net. As is our normal practice, we have not prepared low and high sales density capacity forecasts, rather we have focused on the capacity available to support main foodstores. The forecasts are therefore conservative; if smaller operators and discounters come forward the amount of capacity available would be greater as they have a lower sales density. For example Budgens currently has a sales density of £3,342 per sqm net and Aldi £3,638 per sqm net.
- 10.34 Table 10.3 below illustrates global convenience goods capacity for each local authority. These figures are based on current market shares and take account of the commitments outlined above. It is evident that a significant amount of convenience floorspace capacity is created in the Cambridge sub region in the period 2008-2021. We forecast that in 2011 there will be capacity to support a further 5,570 sqm net of additional convenience goods floorspace, increasing to 10,265 sqm net by 2016 and 13,390 sqm net by 2021.

Table 10.3: Baseline Capacity Forecasts for Convenience Goods (sqm net)

Local Authority	2008-2011 (sqm net)	2008-2016 (sqm net)	2008-2021 (sqm net)
Cambridge City	2,813	5,641	7,075
South Cambridgeshire	2,758	4,625	6,315
Total Cambridge Sub Region	5,570	10,265	13,390

Source: GVA Capacity Modelling, Table 19, Appendix 6.

Comparison Goods Assessment

i) Cambridge City Centre

- 10.35 We have used the household telephone survey to estimate the market share of Cambridge city centre (Table 4, Appendix 6). This includes the trade attracted to the historic core and to the Fitzroy-Burleigh area. Cambridge has an extensive catchment area drawing market share from across the survey area. The core catchment is focused on zones 1 to 6 and zone 15 (Plan 4), where market share ranges from 46% to 70%. In its secondary catchment area, Cambridge has a market share of between 11% and 35% in zones 7, 9, 12-14, 17 and 18. The market share in the remainder of the zones is less than 10%.
- 10.36 We have used our in-centre survey to investigate the proportion of people using Cambridge city from beyond our telephone survey area. This identified that 11% of visitors to the city centre live outside of the telephone survey area (Plan 21). In order to estimate the total comparison goods turnover of Cambridge city centre we have therefore used the market shares from the household telephone interview survey to calculate the turnover from within the survey area and then allowed for a further 11% to account for inflow of expenditure from beyond the survey area
- 10.37 Based on these shopping patterns, we estimate that Cambridge has a comparison goods turnover from the survey area of £814.4m in 2008 (Table 5, Appendix 6). With an inflow of 11% from beyond the survey area this equates to a total town centre comparison turnover of £915m. We estimate that the existing shop floorspace of Cambridge city centre, including the Grafton Centre is 92,479 sqm net. Based upon the current level of turnover Cambridge therefore has a sales density of £9,896 per sqm net. This is a very good level of performance.
- 10.38 The turnover of Cambridge city centre is forecast to increase over the period to 2021 as a result of growth and population and expenditure. We estimate that turnover could reach £1,063m by 2011, £1,350m by 2016 and £1,681m by 2021 (Table 5, Appendix 6).

ii) Out of Centre

10.39 We have identified the market share drawn to the two main retail warehouse parks operating in Cambridge city, as well as three standalone units in Cambridge City and the Tesco Extra at Bar Hill. The out of centre retail parks attract trade from most zones in the survey area, albeit more modest market shares from the outlying zones. The Cambridge Retail Park attracts the highest market shares from the survey area which can be attributed to the wide range of retailers on the park including a number of traditional high street retailers such as Argos, Habitat, Dorothy Perkins and Boots.

10.40 Shoppers are using few retail warehousing destinations outside of the City for their bulky goods shopping, indicating that the existing facilities are meeting their needs. In Cambridge City (zones 1 and 2) most shoppers either use the City Centre, Cambridge Retail Park or other retail warehouses on Newmarket Road for furniture and floor coverings, DIY and decorating goods, domestic appliances and electronic goods. In South Cambridgeshire (zones 3-6) there is a similar pattern, most shoppers travel into the City for bulky goods shopping (Tables 10.4-10.5). Other destinations mentioned in South Cambridgeshire include Bury St Edmunds, Newmarket, Huntingdon, St Ives, Milton Keynes, Saffron Walden, Lakeside and Haverhill.

Table 10.4: Market Share Attracted to Out of Centre Stores in Cambridge City

Zone	Furniture & Floor coverings		DIY & Decorating Goods		Domestic Appliances		Electronic Goods	
	1	2	1	2	1	2	1	2
	Cambridge City Centre	54.8	57.6	25.3	31.5	45.3	59.0	54.4
Cambridge Retail Park	20.5	13.6	41.0	38.4	32.6	26.5	25.3	21.5
B&Q Newmarket Road	1.4	0	20.5	16.4	1.2	1.2	0	0
Beehive Centre	2.7	6.1	3.6	4.1	5.8	2.4	3.8	0
Varies	9.6	12.1	2.4	1.4	5.8	3.6	3.8	3.8
Other	11.0	10.6	7.2	8.2	9.3	7.3	12.7	12.7

Source: GVA Household Telephone Interview Survey

Table 10.5: Market Share Attracted to Out of Centre Stores in South Cambridgeshire

Zone	Furniture & Floor coverings		DIY & Decorating Goods		Domestic Appliances		Electronic Goods	
	3	4	3	4	3	4	3	4
	Cambridge City Centre	51.3	55.0	33.7	31.0	57.7	50.0	56.2
Cambridge Retail Park	17.9	12.5	30.3	31.0	24.4	23.2	21.9	16.7
B&Q Newmarket Road	3.8	0	16.4	11.2	1.3	0	0	0
Beehive Centre	1.3	2.5	1.4	1.1	1.3	2.4	0	2.6
Varies	7.7	13.8	1.1	2.3	1.3	3.7	1.4	3.8
Other	18.0	16.2	17.1	23.4	14.0	20.7	20.5	16.6

Source: GVA Household Telephone Interview Survey

Table 10.5: Market Share Attracted to Out of Centre Stores in South Cambridgeshire continued

Zone	Furniture & Floor coverings		DIY & Decorating Goods		Domestic Appliances		Electronic Goods	
	5	6	5	6	5	6	5	6
	Cambridge City Centre	61.3	41.9	26.8	16.7	52.8	44.4	50.0
Cambridge Retail Park	20.0	28.4	29.3	38.1	23.6	37.0	17.9	38.4
B&Q Newmarket Road	1.3	0	9.8	9.5	0	1.2	0	0
Beehive Centre	1.3	2.7	1.2	1.2	1.1	0	1.3	0
Varies	2.7	8.1	2.4	3.6	1.1	3.7	3.8	5.5
Other	13.4	18.9	30.5	30.9	21.4	13.7	27.0	6.8

Source: GVA Household Telephone Interview Survey

- 10.41 We have compared the market share of the out of centre stores in the core survey zones in 2000 and 2008, drawing on the previous Cambridgeshire and Peterborough Structure Plan Review Retail Study (2001) (Table 10.6). It is evident that the market share of the out of centre stores has increased since 2000; conversely the market share of the city centre has fallen.

Table 10.6: Proportion of Spending Attracted to Out of Centre Stores (sqm net)

Zone	Proportion of Spending Attracted to Out of Centre Stores (%)	
	2000	2008
1	10	18
2	13	16
3	13	14
4	11	13
5	11	12
6	16	19

Source: GVA Household Telephone Interview Survey

- 10.42 We estimate that collectively the out of centre retail stores in Cambridge city draw approximately £171.8m from the survey area, this compares with a turnover based upon company average sales densities of £101.5m. The only out of centre store in South Cambridgeshire identified as attracting trade from the survey area is the Tesco Extra at Bar Hill which sells a wide range of comparison goods. We estimate that the comparison floorspace at Tesco Extra in Bar Hill draws approximately £16.9m, this compares with a turnover based upon company averages of £23.5m.

Baseline Comparison Goods Capacity Forecasts

- 10.43 In assessing capacity for future comparison goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will increase over time, and we have assumed an annual growth in existing sales per sqm net of 2%. Drawing on our experience elsewhere we have assumed new floorspace should achieve sales of at least £7,000 per sqm net. This is a higher level of trading but reflects the current performance of Cambridge at nearly £9,900 per sqm net.

- 10.44 We have factored in a number of commitments for comparison goods floorspace which will come forward in the future (see Table 10, Appendix 6). The majority of these are very small scale and the only one over 1,000 sqm is in Cambridge City at 62-74 Burleigh Street (3,994 sqm net).
- 10.45 Table 10.7 below illustrates the global comparison goods capacity for each local authority. These figures are based on current market share and take account of commitments. It is evident that the growth in population and expenditure in the Cambridge sub region creates a large residual capacity by 2021. We estimate capacity for a further 14,022 sqm net in the sub region by 2011, increasing to 46,163 sqm net by 2016 and 83,932 sqm net by 2021. We estimate that approximately 30% of this capacity is generated as a result of the strong performance of existing out of centre provision.

Table 10.7: Baseline Comparison Goods Floorspace Capacity (sqm net)

Local Authority	2008-2011 (sqm net)	2008-2016 (sqm net)	2008-2021 (sqm net)
Cambridge City	13,847	45,464	82,790
South Cambridgeshire	149	562	1,060
Total Cambridge Sub Region	13,977	46,026	83,850

Source: GVA Capacity Modelling, Tables 12, 13 and 14, Appendix 6.

Summary

- 10.46 Our convenience goods assessment indicates that overall the foodstores in Cambridge City and South Cambridgeshire are performing well. In Cambridge City, in particular, some of the smaller convenience stores in the district and local centres have a strong level of performance compared with company average levels. Freestanding foodstores which are performing well include Waitrose, Trumpington and Sainsbury's, Coldham Lane. In South Cambridgeshire the store which is performing most strongly is Tesco Milton. Most of the smaller foodstores in the South Cambridgeshire rural centres are also performing well.
- 10.47 The strong performance of convenience stores in the Cambridge sub region produces capacity to support further convenience goods floorspace. We have considered convenience goods commitments coming forward and made an allowance for these in preparing the capacity forecasts. As such, based on current market share and taking account of the commitments, we anticipate that in the Cambridge sub region there could be capacity to support 5,570 sqm net of additional convenience goods floorspace by 2011, this could increase to 10,265 sqm net by 2016 and 13,390 sqm net by 2021.
- 10.48 In terms of comparison goods Cambridge has an extremely good level of performance. We estimate that the city centre has a comparison goods turnover of £915m in 2008. This is forecast to increase considerably over the period to 2021. We also estimate that retail warehousing in Cambridge is currently performing well with a combined turnover of £171.8m.

- 10.49 The strong performance of Cambridge for comparison goods creates significant residual capacity over the LDF period. We have only identified very minor development commitments in the pipeline and as such we forecast that by 2011 based upon current market share there could be capacity to support a further 13,997 sqm net of comparison goods floorspace in the Cambridge sub region, this increases to 46,026 sqm net by 2016 and 83,850 sqm net by 2021. We estimate that approximately 30% of this capacity is generated as a result of the strong performance of existing out of centre provision. It should be noted that any capacity arising as a result of out of centre provision does not justify the development of further out of centre floorspace. In line with Government policy, it will be necessary to direct global capacity to town centres in the first instance.
- 10.50 In the next section we examine the possible policy response to the forecast capacity by testing different development scenarios for the Cambridge sub region.

11. QUANTITATIVE ASSESSMENT: SCENARIO TESTING

- 11.1 In this Section, we develop the baseline capacity assessment to test alternative future development scenarios. We have examined the implications for convenience and comparison goods capacity of all the development in the pipeline coming forward. This includes floorspace planned as part of the urban extensions of Cambridge and the new town centre of Northstowe. For comparison goods we have also examined the implications of growth in competing centres on the baseline capacity forecasts.

Convenience Goods Capacity Forecasts with Pipeline Development

- 11.2 The convenience goods capacity scenario, examining the implications for capacity of developments in the pipeline coming forward, draws on estimates from GVA Grimley and information from Cambridgeshire County Council, South Cambridgeshire District Council and Cambridge City Council. The development pipeline includes the following:

Cambridge City

- East Cambridge 3,000 sqm net convenience floorspace in a new district centre.
- Station Area 507 sqm net convenience floorspace in the station fringe development.
- Southern Fringe 682 sqm net convenience floorspace.
- Land between Huntingdon Road and Histon Road (NIAB site) 1,140 sqm net.

South Cambridgeshire

- Cambourne 1,063 sqm net convenience floorspace in new supermarket and 440 sqm net in two unit shops.
- Northstowe 5,525 sqm net convenience floorspace in the new town centre.

- 11.3 The baseline convenience goods capacity assessment indicates capacity for additional convenience goods floorspace in the Cambridge sub region. We estimate capacity to support 5,570 sqm net of additional convenience goods floorspace by 2011; this could increase to 10,265 sqm net by 2016 and 13,390 sqm net by 2021. The scenario testing seeks to understand how this would be affected by new development. We have estimated the turnover of the pipeline development and then removed this from the residual expenditure in the baseline modelling in order to calculate the amount of surplus expenditure available to support new floorspace. This has then been converted into floorspace capacity.

- 11.4 For the scenario testing we have sought to anticipate when development is likely to come forward. The timing of development affects the estimates of capacity as there will be more growth in expenditure to support new floorspace over a longer timescale. We anticipate that only pipeline development at Cambourne is likely to come forward by 2011 and the addition of a supermarket and unit shops there would not utilise all the capacity we have identified in the short-term. The identified capacity would fall from 5,570 sqm net in the baseline to 4,913 sqm net.
- 11.5 By 2016, we have assumed some of the development will have come forward at Northstowe and at the Station Area, Southern Fringe and NIAB site in Cambridge City. This would reduce the residual capacity to 4,224 sqm net compared with 10,265 sqm net in the baseline.
- 11.6 By 2021 we anticipate all the pipeline development will have occurred including all of the convenience floorspace planned for Northstowe and new floorspace at East Cambridge. The scenario testing indicates that with all the pipeline development, and the full build out of Northstowe, residual expenditure capacity to support new floorspace would be removed and there would be a small oversupply of floorspace. However, according to the DTZ phasing details, all of the convenience floorspace at Northstowe may not be completed until 2024/25, as such more expenditure would be available to support new development, reducing the over supply of floorspace.

Table 11.1: Cambridge Sub Region Scenario Testing of Convenience Goods Capacity (sqm net)

Scenario	2008-2011 (sqm net)	2008-2016 (sqm net)	2008-2021 (sqm net)
Baseline Capacity	5,570	10,265	13,390
Forecast capacity taking into account pipeline development	4,913	4,244	1,272

Source: GVA Capacity Modelling, Table 20, Appendix 6.

Comparison Goods Capacity Forecasts with Growth of Competing Centres

- 11.7 We have undertaken a scenario to examine the implications for the capacity in the Cambridge sub region of growth in competing centres. In particular, a significant amount of new floorspace is proposed for Peterborough and this could reduce the market share of Cambridge in the northern parts of its catchment area. Similarly a new shopping centre is being developed in Bury St Edmund's on the Cattle Market Site and this could reduce market share in the east.
- 11.8 The scenario testing illustrates that if the market share of Cambridge was reduced post 2011 in certain outlying zones, there would not be a significant change in the amount of floorspace that could be supported in Cambridge in the future. Table 11.2 illustrates that by 2021 the amount of capacity could have fallen from 83,850 sqm net in the Cambridge sub region to 67,919 sqm net. Despite a reduction in capacity of 15,931 sqm net residual expenditure remains to support a considerable quantum of floorspace.

Table 11.2 Scenario Testing of Comparison Goods Floorspace Capacity (sqm net)

Scenario	2008-2011 (sqm net)	2008-2016 (sqm net)	2008-2021 (sqm net)
Baseline Capacity	13,977	46,026	83,850
Forecast capacity taking into account growth of competing centres	10,194	33,023	67,919

Source: GVA Capacity Modelling, Tables 14, 15 Appendix 6.

Comparison Goods Capacity Forecasts with Pipeline Development

11.9 In preparing the scenario to examine the implications for capacity of comparison developments in the pipeline coming forward, we have drawn on estimates from GVA Grimley and information provided by Cambridgeshire County Council, South Cambridgeshire District Council and Cambridge City Council (Table 11, Appendix 6). The main developments in the pipeline are for East Cambridge and Northstowe town centre in South Cambridgeshire.

11.10 In total, the development pipeline includes the following:

Cambridge City

- East Cambridge 7,000 sqm net comparison floorspace in a new district centre.
- Station Area 697 sqm net comparison floorspace in the station fringe development.

South Cambridgeshire

- Cambourne 2,968 sqm net comparison floorspace in the new rural centre.
- Northstowe 21,750 sqm net comparison floorspace in the new town centre.

Cambridge City

11.11 In terms of the pipeline development information, the amount of floorspace at East Cambridge has yet to be decided. We consider that ultimately it should be informed by a number of different factors. We have for example, identified four different areas of relevance in examining the appropriate amount of floorspace at East Cambridge.

11.12 First, the amount of expenditure that will be generated by the new population should be considered. Based upon 10,000 - 12,000 new dwellings and therefore 25,000 - 30,000 new people, we anticipate an increase in available comparison goods expenditure of £102m-£123m in 2016. The household telephone interview survey indicates that currently 66% of comparison goods shopping in the

Cambridge area (zones 1 and 2) is carried out in the City Centre. Therefore assuming this pattern will continue with the new residents, 34% of the increase in expenditure would be available to support new comparison floorspace outside the City Centre, this is £35m - £42m which could equate to 8,700 – 10,500 sqm net of comparison floorspace.

- 11.13 Second, from a commercial point of view, we consider that a new district centre is unlikely to exceed 10,000 sqm net. Beyond this level it is likely to start to require large scale anchor stores which are unlikely to be appropriate in this location given its proximity to the City Centre. With a centre of 10,000 sqm net, this would be likely to include a 5,000 sqm net convenience store, with 3,250 sqm net of convenience goods floorspace and 1,750 sqm net of comparison goods floorspace. This convenience superstore would be supplemented by unit shops totalling 5,000 sqm net comparison goods, resulting in a total comparison goods floorspace of 6,750 sqm net.
- 11.14 Third, the global capacity forecasts for the Cambridge sub region estimate considerable surplus expenditure to support new floorspace over the period to 2021. It can be assumed that a proportion of this capacity could be accommodated in East Cambridge district centre. The constraints on the City Centre are likely to prevent significant amounts of new floorspace coming forward there over the LDF period and as such, new development in the growth areas/towns will have a role in meeting comparison goods shopping needs. If the baseline capacity forecasts were apportioned 25% each to the City Centre, Northstowe, East Cambridge and elsewhere, it would result in capacity in East Cambridge of 3,499 sqm net in 2011, increasing to 11,507 sqm net in 2016 and 20,962 sqm net by 2021.
- 11.15 Fourth, it is possible to compare with other district centres. In terms of the existing district centres in Cambridge, the average number of comparison units is 20, assuming a nominal floorspace of 100 sqm gross (75 sqm net), this creates an average comparison goods floorspace of 1,500 sqm net in the existing district centres in the urban area. The proposals at East Cambridge will involve the provision of a large district centre, which is likely to include one or two larger stores and will be bigger than the current district centre average.
- 11.16 These different considerations illustrate that the amount of comparison goods floorspace that could be appropriate at East Cambridge is likely to be in the region of 7,000 sqm net. This would be supplemented by a convenience superstore and additional service uses. We have therefore included 7,000 sqm net of comparison goods floorspace at East Cambridge in our scenario testing of the capacity with development in the pipeline coming forward. We have anticipated development coming forward by 2021.
- 11.17 An outline planning application is currently under consideration for the Station Area in Cambridge. This involves a comprehensive redevelopment of this area to provide residential units, 74,778 sqm of commercial space, retail space, office space, a hotel and D1/D2 uses. The A1 (retail and food and drink space) is 5,225 sqm gross and the applicant's consultants have indicated that this will include 697 sqm net of comparison goods floorspace (Retail Assessment Report, January 2008). We have anticipated development coming forward by 2016.

South Cambridgeshire

- 11.18 The pipeline development in South Cambridgeshire includes further floorspace at Cambourne and the new town of Northstowe. The proposals for the final stages of development at Cambourne are still evolving, according to South Cambridgeshire District Council the current thinking is for a supermarket and two unit shops on the plot formerly allocated for a DIY store. The amount of comparison floorspace at Cambourne High Street has also been reduced from 6,527 sqm gross to 4,117 sqm gross and there is 449 sqm gross at the nursing home complex. This has been netted down to an additional 2,968 sqm net at Cambourne over the LDF period. We have anticipated this development will come forward by 2011.
- 11.19 A planning application was submitted in December 2007 for the new settlement of Northstowe. The application comprises approximate 9,500 dwellings plus 54,500 sqm (gross) of retail floorspace of which 49,500 sqm gross would be in the new town centre. The remaining floorspace (5,000 sqm gross) will be in five local centres. A Retail Capacity and Impact Report prepared by DTZ was submitted in conjunction with the planning application in December 2007. This report indicates that the proposed breakdown of retail floorspace will include 8,500 sqm gross convenience floorspace, equating to 5,525 sqm net and 25,000 sqm gross comparison floorspace equating to 21,750 sqm net.
- 11.20 The Retail Capacity and Impact Report indicates the phasing of development. By 2021 DTZ anticipate 14,250 sqm net of the comparison goods floorspace will be built with the remainder, to a total of 21,750 sqm net completed by 2024/25. The quantitative capacity modelling in this Study only covers the period to 2021. As such we anticipate the implications for capacity of all the Northstowe floorspace coming forward by 2021. If it comes forward over a longer timescale there will be more growth in expenditure to support new floorspace.

Capacity Forecasts

- 11.21 The capacity forecasts illustrate that if the pipeline developments come forward, including Northstowe and East Cambridge, there will be a reduction in the amount of floorspace that could be supported in the sub region in the longer term. Table 11.3 illustrates that by 2021 the amount of capacity could have fallen from 83,850 sqm to 61,859 sqm net. This is a reduction of 22,261 sqm net.
- 11.22 We have also forecast the combined effect of growth in competing centres and pipeline development coming forward. This would result in a reduction in capacity in the Cambridge sub region to 45,928 sqm net by 2021.
- 11.23 The scenario testing therefore illustrates that even with growth in competing centres and pipeline development there would remain capacity for growth in Cambridge in the longer term.

Table 11.3 Scenario Testing of Comparison Goods Floorspace Capacity (sqm net)

Scenario	2008-2011 (sqm net)	2008-2016 (sqm net)	2008-2021 (sqm net)
Baseline Capacity	13,997	46,026	83,850
Forecast capacity taking into account growth of competing centres	10,194	33,023	67,919
Forecast capacity taking into account growth pipeline development	12,647	44,186	61,859
Forecast capacity taking into account growth of competing centres & pipeline development	8,844	31,183	45,928

Source: GVA Capacity Modelling, Tables 14, 15, 16 and 17 Appendix 6.

Implications of Development of Northstowe Town Centre

- 11.24 We have carried out an initial review of the retail matters arising from the Northstowe proposals. This letter (Appendix 9) was sent to South Cambridgeshire District Council on 11th April 2008. We understand that the consultants working on the Northstowe application (Arups, DTZ and Peter Shearman Associates) are proposing to formally respond to the District Council on the points raised in September 2008.
- 11.25 Our capacity work indicates there will be sufficient capacity to support the food and non-food proposals at Northstowe provided they are phased as set out in the Retail Capacity and Impact Report (December 2007). In terms of convenience goods, the Northstowe proposals will, in conjunction with other pipeline schemes, remove the surplus capacity in 2021. The phasing of the proposals set out by DTZ indicates that not all of the convenience goods floorspace will be completed until 2024/2025 by which point there will be further expenditure growth to support the proposals.
- 11.26 In terms of comparison goods, we have forecast a significant quantum of capacity for the Cambridge sub region. This is more than sufficient to support the Northstowe proposals in addition to other pipeline schemes. In effect Northstowe will have an important role in providing floorspace to meet some of the quantitative comparison goods capacity arising in the sub region.
- 11.27 We have undertaken an assessment of the potential impact of the Northstowe proposals on the key competing centres in the Cambridge sub region. The focus of this assessment is on the comparison goods floorspace proposed at Northstowe. We anticipate that the impact of the convenience goods floorspace will largely fall upon out of centre stores at Bar Hill and Milton and as such we have not investigated the convenience goods impact.
- 11.28 For comparison goods, we have assessed the impact of Northstowe at 2021. This is the end date for this study; at this point the Northstowe scheme will not be completed in its entirety. The impacts projected in 2021 will therefore be mitigated by growth in expenditure through to 2024/2025 when the

town centre is projected to be fully completed. We have also examined the impact of the proposed floorspace coming forward earlier at 2016. The consultant's acting for the developers have indicated that the town centre comparison goods development will happen towards the end of the Northstowe build out. However, at the moment there are no planning controls in place or under discussion to ensure that this would be the case.

- 11.29 In order to examine the potential impact of Northstowe we have estimated the turnover of the proposed comparison goods floorspace. We anticipate that it will have a turnover of £127m in 2016 and £140.7m by 2021. We estimate that the majority of this trade will be drawn from the survey zone in which Northstowe will be located (zone 3) and the adjacent zone (zone 4). For example, £63.3m from survey zone 3 in 2021 and £28.1m from survey zone 4. We have determined how this trade draw to Northstowe will affect the forecast turnover of competing centres.
- 11.30 The competing centres most likely to be affected by the Northstowe proposals are Cambridge, Peterborough, Bury St Edmunds, Ely, Newmarket, Huntingdon, St Neots and St Ives. Table 16, Appendix 10 sets out the likely impact in terms of the reduction in turnover of these centres in 2016 and 2021.
- 11.31 In terms of the centres covered in this Retail Study, Cambridge is the only centre likely to be affected from the point of view of comparison goods trade, by the Northstowe proposals. We forecast that without the Northstowe proposals the turnover of Cambridge from the survey area would increase from £814.4 in 2008 to £1,202m in 2016 and £1,496.5m in 2021. If the Northstowe scheme came forward in its entirety by 2016 we forecast that the turnover of the city centre could be reduced to £1,143m. When compared with £1,202m, this is a reduction of £58.6m or a 5% fall in turnover. We forecast that by 2021 the Northstowe proposals could result in a reduction of the city centre turnover to £1,438m from £1,496m; a reduction of £58.7m or 4%. Overall Cambridge has such a large turnover that the loss of trade forecast as result of the Northstowe proposals would not be a cause for concern.
- 11.32 Other centres that are likely to be affected by the Northstowe proposals are not the subject of this Retail Study. We have, however, examined the likely implications for the turnover of the centres we consider could be affected. This quantitative assessment needs to sit alongside a qualitative review of the centres in order to fully understand the likely implications. However, this is not the subject of this Retail Study and as such we have just examined the quantitative impact. We estimate an impact as a result of the Northstowe proposals of 1% on Peterborough, 7% on Ely, 9% on Newmarket and 1% on St Neots in 2021. These impact estimates, with a less than 10% reduction in turnover, should not be a cause for concern.
- 11.33 We forecast the greatest effect of the Northstowe proposals on Huntingdon and St Ives. These are the centres in closest proximity to Northstowe. In the case of Huntingdon, we forecast that if the Northstowe proposals came forward in their entirety by 2016 there would be a reduction in the turnover of the market town of 15%. The forecast turnover of Huntingdon in 2016 is £157m if there was no new development. However, if Northstowe came forward, the turnover of Huntingdon could be reduced by £23.6m to £133.4m.

- 11.34 If development at Northstowe came forward over a longer time period there would be more growth in the turnover of Huntingdon and the impact would be reduced. We anticipate that by 2021 the turnover of Huntingdon would be reduced by 15% if new development came forward at Northstowe. The turnover of the market town would be £164m rather than £192m. As such it is evident that Huntingdon would be better placed to withstand the impact of new development at Northstowe if proposals came forward over a longer time frame.
- 11.35 We anticipate the greatest impact upon St Ives as a result of the Northstowe proposals. St Ives is one of the smaller market towns and is closest to Northstowe. We estimate it has a turnover of £39m in 2008, this could grow to £52m by 2016, if there was no new development coming forward. We forecast that as a result of the Northstowe proposals the turnover could fall to £39m in 2016. This is a reduction of £12.3m or a 24% impact and the turnover of St Ives would fall below 2008 levels. St Ives would be better placed to withstand the Northstowe proposals if they come forward over the longer time frame. We forecast, for example, that by 2021 without any new development the market town would have a turnover of £62m. With new development at Northstowe this would fall to £49m. Whilst this is a reduction of £14m or 22%, overall the turnover of St Ives would have increased on 2008 levels.
- 11.36 These impact figures, particularly for Huntingdon and St Ives need to be considered in context. For St Ives in particular, we understand that it is pleasant, historic market town which benefits from some tourist and visitor trade. As such it may be better placed to withstand the impact of new development at Northstowe as there are likely to be opportunities to diversify its offer.

Summary

- 11.37 We have examined the implications of new convenience goods development in the pipeline coming forward over the LDF period. In particular, we have considered additional new convenience floorspace at Cambridge East, the Station Area and the Southern Fringe and at Northstowe in South Cambridgeshire. If all these schemes came forward it would effectively remove convenience goods capacity by 2021.
- 11.38 For comparison goods, we have examined a scenario to test the implications for the capacity in the Cambridge sub region of growth in competing centres. Despite a reduction in market share as a result of proposals coming forward in Peterborough and Bury St Edmunds, we do not anticipate that the capacity for further comparison goods floorspace would be significantly reduced.
- 11.39 We have also undertaken a scenario to examine the implications for capacity of developments in the pipeline coming forward. This includes further development at Cambourne and the new town at Northstowe in South Cambridgeshire and in Cambridge City the new district centre at East Cambridge and some comparison goods floorspace in the Station Area. Forecasts indicate a reduction in capacity as a result of these pipeline developments coming forward. Although, again this would still not be significant.
- 11.40 The final scenario we have examined is the combined effect of growth in competing centres and pipeline development coming forward. This would reduce the capacity in the sub region to 8,844
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sqm net of comparison goods floorspace by 2011, 31,183 sqm net by 2016 and 45,928 sqm net by 2021.

- 11.41 In terms of the proposed new development at Northstowe, the scenario testing indicates that there is sufficient convenience and comparison goods capacity to support the proposed floorspace, provided it comes forward in the phases identified by DTZ in the Retail Capacity and Impact Report. The new town centre will assist in addressing residual comparison capacity arising as a result of the strong level of trading of Cambridge city centre.
- 11.42 Whilst a need can be demonstrated, the level of impact will be more of an issue. We have examined the potential implications of the new town centre development proposed at Northstowe. In particular, we have estimated the likely impact of the new comparison goods floorspace on surrounding centres. Cambridge City Centre is the only centre in this Retail Study likely to be affected by the proposals and we have only forecast a modest impact. We forecast that the greatest impact is likely to be on Huntingdon and St Ives and particularly if development came forward earlier than currently proposed.

12. CONCLUSIONS AND RECOMMENDATIONS

Convenience Goods

- 12.1 The qualitative analysis has highlighted a good convenience store provision in Cambridge and South Cambridgeshire. The City Centre has top-up and visitor shopping provision at Sainsburys Central and Mark and Spencer stores, local and independent food stores and the market. Although there is a below average convenience store provision in the City Centre, it is supplemented by a range of local and out of centre facilities.
- 12.2 All of the district and local centres in Cambridge City have at least one convenience store. The larger centres have more convenience units and contain larger stores with a more varied product range. Many of the foodstores in the district and local centres are operated by national multiples. These centres also have a good range of other convenience uses, such as independent butchers, bakers, greengrocers and delicatessens.
- 12.3 The rural centres in South Cambridgeshire all have a strong local convenience shopping role. They have a good convenience store provision, including a supermarket operated by a national multiple such as Co-op, Budgens, Tesco Express and Morrisons. These centres are mainly traditional village centres which have been established over a number of years, with the exception of Cambourne which is a purpose built centre.
- 12.4 The seven out of centre convenience superstores result in a good main food shopping coverage of Cambridge and South Cambridgeshire. Whilst Tesco have a strong presence, operating four of the seven out of centre foodstores in the sub region, all of the operators are represented.
- 12.5 The quantitative analysis indicates that the convenience stores in Cambridge are performing well. Sainsbury's in the City Centre is performing adequately. Nearly all of the national multiples in the district and local centres are performing at above average levels and several of the stores are trading extremely well. The strong performance of the Aldi store highlights the lack of deep discount foodstores in the Cambridge sub region and the potential need to expand this provision. The good performance of other convenience stores in the district and local centres reflects their important role as top-up food shopping destinations for local residents and the need to provide further local convenience shopping facilities, particularly in the planned new urban extensions. The out of centre Sainsburys and Waitrose in Cambridge City are both performing strongly whereas the Asda and Tesco stores are performing less well. This is likely to be the result of a number of factors, including shoppers preference for certain operators.
- 12.6 In South Cambridgeshire, most of the convenience stores in the rural centres are performing well. Similarly all the out of centre convenience superstores are performing at above average levels. Of the three out of centre Tesco stores in South Cambridgeshire the Tesco at Milton has the strongest

performance. The strong performance of these stores contributes to the convenience capacity in the sub region.

- 12.7 Overall, in the Cambridge sub region we forecast fairly significant amounts of capacity to support additional convenience goods floorspace. We forecast that in 2011, there will be capacity to support a further 5,570 sqm net of additional convenience goods floorspace, increasing to 10,265 sqm net by 2016 and 13,390 sqm net by 2021. This capacity could however be absorbed by convenience goods development in the pipeline.
- 12.8 The scenario testing indicates that if there is a new superstore at a new East Cambridge District Centre, additional convenience goods provision at the Station Area, the Southern Fringe and on Huntingdon Road, a new supermarket at Cambourne and a new superstore and other local provision at Northstowe the capacity for convenience goods floorspace would be fully absorbed with a small over provision in 2021.
- 12.9 We recommend that:
- **There is no need to plan for further convenience goods development in Cambridge City Centre and in accordance with planning policy priorities the focus should be on district, local and rural centres, both existing and those that are proposed.**
 - **In the existing district, local and rural centres in the Cambridge sub region, we consider that where opportunities arise there will be scope for more small scale convenience goods provision to supplement their existing role and function. There is also a need for some further deep discounter provision within the Cambridge sub region and the focus of this should in the first instance be the district, local and rural centres.**
 - **We consider new larger convenience stores at East Cambridge district centre and Northstowe town centre, in conjunction with smaller scale provision elsewhere, would be sufficient to meet convenience shopping needs in the Cambridge sub region. We have tested the capacity for 3,000 sqm net of convenience goods floorspace at East Cambridge and 5,525 sqm net at Northstowe.**

Comparison Goods

- 12.10 The qualitative analysis highlights that Cambridge City Centre is performing very well for comparison goods shopping. Cambridge is an attractive and vibrant shopping destination which has a broad offer appealing to a range of shoppers. It has a good selection of mid market retailers in both the Grafton Centre and the historic centre. The historic centre also now benefits from the new Grand Arcade shopping centre and Christ's Lane. This is further complimented by independent shops and boutiques.
- 12.11 Retail warehousing provision in Cambridge also contributes to the comparison shopping offer. The retail parks provide for much of shopper's bulky goods needs with a range of goods and limited leakage of trade. In recent years a number of traditional high street retailers have started to locate

on the parks, reducing opportunities for bulky goods operators. The market share of the out of centre provision has also increased relative to the City Centre since the previous Retail Study

- 12.12 The smaller centres in the retail hierarchy in Cambridge and South Cambridgeshire do not have such a significant comparison shopping function. They provide more specialist comparison shopping and everyday household items.
- 12.13 The quantitative comparison goods assessment indicates that Cambridge city centre is performing extremely well with a very high level of turnover which is forecast to grow over the LDF period. Retail warehousing in Cambridge is also performing strongly. As a result, we anticipate that there will be a large residual capacity for additional comparison goods floorspace in the Cambridge sub region over the LDF period. We forecast that by 2011 based upon current market share there could be capacity to support a further 13,997 sqm net of comparison goods floorspace in the Cambridge sub region, this increases to 46,026 sqm net by 2016 and 83,850 sqm net by 2021. We estimate that approximately 30% of this capacity is generated as a result of the strong performance of existing out of centre provision. It should be noted that any capacity arising as a result of out of centre provision does not justify the development of further out of centre floorspace. In line with Government policy, it will be necessary to direct global capacity to town centres in the first instance.
- 12.14 We have tested the extent to which the comparison goods capacity could be reduced in the future. First, as a result of growth of competing centres and second through comparison goods development in the pipeline for the Cambridge sub region. Neither scenario would individually significantly alter the capacity forecasts, but the combined effect of growth in competing centres and pipeline development would reduce the surplus capacity. We estimate that capacity would be reduced to 8,844 sqm net by 2011, 31,183 sqm net by 2016 and 45,928 sqm net by 2021. Whilst this is still a significant quantum of floorspace by 2021, the forecasting timescales are over 10 years time. It is possible that growth may not be as strong as predicted particularly as the role ofetailing may increase. It will therefore be necessary to monitor and review the forecasts, particularly in the light of the current economic climate.
- 12.15 Overall, we recommend the following:
- **It is not be necessary to plan for significant new development in Cambridge city centre in the short term. The strength of the existing provision in the Cambridge sub region should largely address shopper's needs.**
 - **Cambridge city centre should go through a settling down period following the introduction of Christ's Lane and the Grand Arcade shopping scheme. The focus should be on infill development and/or replacement of existing floorspace which is of a poorer quality.**
 - **New centres at East Cambridge and Northstowe should contribute towards meeting any existing resident's comparison shopping needs arising, in addition to the needs of new residents. They could also accommodate some retail warehousing provision.**

- **We also anticipate that some shoppers needs in the outer parts of the catchment, will be met by new developments coming forward elsewhere, particularly at Peterborough and Bury St Edmunds.**
- **The majority of capacity we have identified is arising towards the end of the LDF period and we therefore suggest that the forecasts are updated and reviewed on a regular basis to re-examine the capacity.**
- **Further out-of-centre retail development should be resisted and the Council should not designate existing out of centre shopping facilities within the retail hierarchy. Proposals in respect of existing out-of-centre shopping destinations should be assessed against national policy guidance (PPS6). It will be important to protect the vitality and viability of the existing centres and restrict the spread of high street retailing to out of centre locations.**