



Report

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# Cambridge Retail and Leisure Study Update 2013

Cambridge City Council

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## 1. Introduction

- 1.1 In September 2012, GVA was instructed by Cambridge City Council to undertake a Retail and Leisure Study for the City which provides an update to the Cambridge Sub-Region Study (CSRS) previously prepared by GVA in 2008. The purpose of this report is to provide a sound and robust evidence base to inform the strategic options and development management policies set out within the City's emerging Local Plan which will cover the period up to 2031.
- 1.2 Our terms of reference are to:
- Establish the extent to which the current retail and leisure provision in the City satisfies the level and nature of consumer demand within its catchment;
  - Estimate the scale and nature of changes in this position that may arise in the light of potential increases in population, and forecast changes in retail and leisure expenditure;
  - Identify the scale and nature of additional retail provision that may be appropriate in the City to the period 2031 and intervening five year periods;
  - Assess the scope for new retail development and the potential to accommodate this within the City; and
  - Advise on the appropriateness of the existing hierarchy of centres, shopping frontages and the need for specific development management polices.
- 1.3 In order to address these requirements, our methodology incorporates a comprehensive up-to-date review of retailing and leisure needs in the City with a particular emphasis on Cambridge City Centre. We have also looked at the current performance and role of the three district and 22 local centres, and the potential for new centres to be defined over the forthcoming plan period.
- 1.4 In addition to our own on-site and desk-based evidence gathering, we commissioned a new and up-to-date telephone survey of 1,000 households across 10 zones (see Plan 1). We have also drawn on the Council's detailed audits of existing uses, which were completed in October 2012. The results of our analysis are drawn together to provide the

Council with a clear set of recommendations and advice to inform the ongoing preparation of the new Local Plan.

## Structure

1.5 This report is structured as follows:

- **Section 2** sets out our review of national, strategic and local planning policies relevant to retail and leisure planning in the City;
- **Section 3** highlights some of the key trends which are currently influencing the retail and leisure industries.
- **Sections 4, 5 and 6** presents our qualitative assessment of Cambridge City Centre, the District and Local Centres and out-of-centre retail provision.
- **Section 7** sets out the global capacity forecasts for new retail provision;
- **Section 8** presents our review of existing leisure facilities and the need for additional provision.
- **Section 9** draws together the evidence from all previous sections and sets out our conclusions and recommendations.

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## 2. Policy Framework

2.1 In this section we review the key national, regional and local planning policy documents which provide the context for this study and identify the key policies influencing the future retail and leisure planning strategy for Cambridge City Council.

### National Policy

#### National Planning Policy Framework (March 2012)

2.2 The National Planning Policy Framework (NPPF), published on 27 March 2012 sets out the Government's planning policies for England and replaces the suite of national Planning Policy Statements, Planning Policy Guidance and some Circulars with a single, streamlined document.

2.3 At the heart of the NPPF is a 'presumption in favour of sustainable development', which should be seen as a golden thread running through both plan-making and decision-taking. The NPPF encourages Local Planning Authorities (LPAs) to positively seek opportunities to meet the development needs of their area.

2.4 The NPPF continues to recognise that the planning system is plan-led and therefore Local Plans, incorporating neighbourhood plans where relevant, are the starting point for the determination of any planning application. In line with the Government's aim to streamline the planning process, each LPA should produce a single Local Plan for its area with any additional DPDs or SPDs to be used only where clearly justified.

2.5 Consistent with PPS4, the NPPF advocates a 'town centres first' approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. In planning for town centres LPAs should:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- Define a network and hierarchy of centres that is resilient to anticipated future economic changes;

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- Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary shopping frontages in designated centres and set policies that make clear which uses will be permitted in such locations;
  - Promote competitive town centres that provide customer choice and a diverse retail offer which reflect the individuality of town centres;
  - Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
  - Allocate a range of suitable sites to meet the scale and type of economic development needed in town centres. Where town centre sites are not available, LPAs should adopt a sequential approach to allocate appropriate edge of centre sites;
  - Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
  - Recognise that residential development can play an important role in ensuring the vitality of centres; and
  - Where town centres are in decline, plan positively for their future to encourage economic activity.
- 2.6 The NPPF requires Local Plans to be aspirational but realistic. They should address the spatial implications of economic, social and environmental change and set out opportunities for development and clear policies indicating what will or will not be permitted and where.
- 2.7 LPAs should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. These assessments should be integrated and take full account of relevant market and economic signals. LPAs should use the evidence base to assess, inter alia;
- The needs for land or floorspace for economic development, taking account of both quantitative and qualitative requirements for all foreseeable types of economic activity over the plan period, including retail and commercial leisure development;
  - The existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs;

- The role and function of town centres and the relationship between them, including any trends in the performance of centres;
- The capacity of existing centres to accommodate new town centre development; and
- Locations of deprivation which may benefit from planning remedial action.

## Relevant Government Research

### The Portas Review (December 2011)

- 2.8 In May 2011, Mary Portas was appointed to lead an independent review into the future of the high street, largely in response to the far-reaching effects of the recession on the retail industry and local high streets in particular. The report, published in December 2011, suggests measures to tackle the further decline of the high street.
- 2.9 Amongst 28 separate recommendations in the report, there is a call to strength policy in favour of 'town centres first' following the publication of the draft NPPF. In summary the recommendations aim to:
- Run town centres like businesses: by strengthening the management of high streets through 'Town Teams', developing the BID model and encouraging new markets;
  - Get the basics right: by looking at how the business rate system could better support small businesses and independent retailers, encouraging affordable town centre car parking and looking at further opportunities to remove red tape on the high street;
  - Level the playing field: by ensuring a strong town centre first approach in planning, introduce Secretary of State 'exceptional sign off' and encouraging large retailers to show their support for high streets by mentoring local businesses;
  - Define landlords' roles/responsibilities: by looking at disincentives for landlords leaving properties vacant, and empowering local authorities where landlords are negligent and making proactive use of Compulsory Purchase Order powers; and
  - Give communities greater say: by including the high street in neighbourhood planning and encouraging innovative community uses of empty high street spaces.

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## Government Response to Portas Review (March 2012)

- 2.10 The Government published its formal response to the Portas Review in March 2012, which accepted virtually all of Portas' recommendations. It announced that they will run 24 'Portas Pilot' towns to set up Town Teams to create plans for the future of their high streets. In addition the Government will provide investment to help Business Improvement Districts (BIDs) access loans for their set-up costs and funding for a Future High Street X-Fund to reward towns which are delivering innovative plans to bring their town centres back to life. In its response, the Government also supports a National Market Day in June and plans to double small business rate relief.
- 2.11 The Government supports community involvement in the redesigning of their high streets to reinvigorate areas of decline and to increase footfall and encourages people to live in their town centres.
- 2.12 The Government did not support the call to introduce Secretary of State 'exceptional sign off' for all new out-of-town developments and require all large new developments to have an 'affordable shops' quota. The Government states that LPAs are best placed to understand local needs and 'exceptional sign off' is contrary to the Government's ethos of devolution. As such, the Government will continue to use the call-in power sparingly.

## Understanding High Street Performance (December 2011)

- 2.13 The department for Business, Innovation and Skills (BIS) has also published a report which explores the many factors impacting on the economic and social performance of town centres and high streets. This study is intended to help inform government and local authority decision-making regarding town centres and high streets.
- 2.14 The study, based on a review of the available research and literature on high streets, identifies key issues that the public, private and third sectors need to take into consideration when taking action or investing in high streets. The study identifies a range of influencing factors which have stimulated and affected change on the high street:
- Externalities – despite planning policies to protect town centres, high levels of retail and landlord debt and public spending cuts have squeezed consumer spending;



- Spatial and Physical Factors – large format stores, accessible by car and where shopping is done under one roof, dominate the market to the detriment of traditional high streets.
- Market Forces – the growth in market share of out-of-centre shopping centres, major supermarkets and retail parks in comparison to town centres, demonstrates that consumers are voting with their feet; and
- Management – high streets are difficult to manage and as a result are disadvantaged compared with supermarkets and shopping centres.

2.15 The study also examines the responses to high street change which have been implemented to date. These include; town centre masterplanning and public realm improvements; differentiation and emphasising a distinctive retail offer; policy prioritisation and more developed place management (e.g. TCM and BIDs).

2.16 Moving forwards, the study anticipates that where the high-street performance is concerned (which is largely retail-based), the broad trends are downwards (i.e. increasingly challenging). Town centres will continue to be impacted by the growth in out-of-centre retail, supermarkets non-food sales, and the Internet. It is emphasised that the high street of the future will need to differentiate itself from shopping centres, as a social space with a range of functions.

2.17 The report concludes that the traditional high street faces a number of challenges, not least from the tightening of retail spend and changing consumer behaviour but also from increasing competition posed by the Internet and out-of-centre developments. Whilst the future is uncertain, strategies which support the high street are considered ever more vital.

## Local Policy

### The Cambridge Local Plan (2006)

2.18 The Cambridge Local Plan was adopted in 2006 and sets out the vision, policies and proposals for future development and land use in Cambridge up to 2016. The majority of the policies in the Local Plan were 'saved' by the Secretary of State in 2009.

2.19 The Council's spatial strategy for Cambridge includes enhancing the city centre's historic core for civic activities, two Universities, shopping, leisure and residential uses. As a sub-

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- regional shopping centre, the Local Plan states that the centre will be enhanced by the implementation of the Grand Arcade shopping development on St Andrew's Street and other redevelopments at Bradwell's Court and around the Grafton Centre (which have since been completed).
- 2.20 The spatial strategy also supports the regeneration of the station area as a mixed use city district, including retail and leisure facilities, built around an enhanced transport interchange. In addition, the strategy supports the consolidation and development of four peripheral mixed use centres in the north, south, west and east of the city to accommodate future employment and residential growth.
- 2.21 A key objective of the plan is *'to ensure that Cambridge is vibrant and thriving with a range of leisure, tourism and shopping facilities in accessible locations to meet the needs of the residents of the city and sub-region'*.
- 2.22 In relation to leisure, **Policy 6/1** seeks to protect existing leisure facilities, whilst **Policy 6/2** supports the provision or improvement of leisure facilities. The Council also support development which maintains, strengthens and diversifies the range of visitor attractions in the city through **Policy 6/4**.
- 2.23 **Policy 6/6** sets out the Council's requirements relating to change of use from Class A1 to Classes A2, A3, A4 or A5 uses at ground floor in the city centre. Change of use will only be permitted in primary shopping frontages where the proposal would not harm the contribution the frontage makes to the vitality and viability of the city centre. Permission will be granted in secondary frontages where the percentage for A1 uses does not fall below 60%, except in Regent Street/St Andrew's Street (25%) and Bridge Street (40%).
- 2.24 Within the district and local centres, **Policy 6/7** supports additional development within Class A1, A2, A3, A4 and A5 use if it will serve the local community and is of an appropriate nature and scale. Changes of use from A1 to A2, A3, A4 or A5 use will only be permitted where the percentage of A1 uses does not fall below 60%. Change of use from A1 to other uses will not be permitted in district and local centres.
- 2.25 For convenience goods shopping, **Policy 6/8** states that convenience floorspace will only be permitted if: it is for smaller shops (up to 1,400 sqm net) in existing centres; it is a minor extension to an existing shop (10% increase in net floorspace); if it would replace existing
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provision in the locality; or if it is part of mixed use areas including the station area and in the new urban extensions.

- 2.26 **Policy 6/9** seeks to restrict retail warehouse development. This type of development will only be permitted if it is to modernise or replace existing retail warehouses and should not result in an increase of floorspace. **Policy 6/10** seeks to control the environmental impact of Class A3, A4 and A5 food and drink outlets, and provision of such uses should be within existing centres or as part of a mixed use area in an urban extension or within the station area.

### Cambridge East Area Action Plan (2008)

- 2.27 The Cambridge East Area Action Plan (AAP) was prepared jointly between Cambridge City Council and South Cambridgeshire District Council and was adopted in 2008. The AAP set out the vision and development principles for a new urban quarter on the site of Marshalls Airport.
- 2.28 However, in April 2010, Marshalls announced that it would not be relocating from Cambridge airport in the immediate future. This has since been confirmed as meaning at least until the end of the forthcoming plan period to 2031. The City Council and South Cambridgeshire District Council are currently exploring what this means for the future direction of development in their respective areas as well as how the current allocation should be dealt with.

### Cambridge North West Area Action Plan (2009)

- 2.29 The Cambridge North West AAP was prepared jointly between Cambridge City Council and South Cambridgeshire District Council and was formally adopted in 2009. The AAP relates to an area of land between Madingley Road and Huntingdon Road which will become a new University Quarter.
- 2.30 The proposals include the creation of a new local centre to provide facilities and services for nearby communities. **Policy NW21** relates to the provision of the new local centre, and supports the delivery of a single centre at the heart of the development, which is easily accessible. The policy outlines suitable uses in the local centre, including a primary school, appropriate levels of local shopping and other services, a library, community rooms, provision for emergency services, a play area, recycling and health care provision.

- 2.31 On 8th August 2012, planning permission was granted for the mixed use development of the University site to provide a new University quarter and residential community. The area will be served by a new local centre anchored by a 2,000 sqm net supermarket.

### Draft Cambridge Local Plan Review (Issues and Options) (2012)

- 2.32 The City Council are currently in the process of preparing a new Local Plan. The initial draft Issues and Options report was published for public consultation in June/July 2012. This document set out the spatial strategy and identified the key issues facing the city.
- 2.33 A second round of public consultation, to include Site Options for Development, is currently underway (in January 2013). Following this, the draft Submission Local Plan consultation is scheduled to take place in summer 2013.

## Relevant Evidence Base Documents

### Cambridge Sub-Region Retail Study (2008) Amended (2009)

- 2.34 The previous retail study, prepared by GVA, was a joint Study undertaken on behalf of Cambridge City and South Cambridgeshire District Councils.
- 2.35 The 2008 Study examined the network of centres and out-of-centre retail provision across both the City and South Cambridgeshire District. With respect to the City, the Study identified no need to plan for any additional convenience goods floorspace and recommended that any new convenience goods provision be directed towards existing and proposed district, local and rural centres. The Study identified capacity for a large new supermarket at the proposed district centre in East Cambridge (3,000 sqm net) to serve the new communities planned for this area.
- 2.36 For comparison goods, the Study found Cambridge city centre to be performing very well, and achieving a high turnover. The Study identified capacity to support approximately 13,997 sqm net additional comparison goods floorspace in the sub-region by 2011, increasing to 46,026 sqm net by 2016, and to 83,850 sqm net by 2021 (baseline figures). The Study recommended that it was not necessary to plan for significant new development in Cambridge city centre in the short term and that the city centre should go through a settling down period following the introduction of Christ's Lane and the Grand Arcade shopping schemes.

- 2.37 The Study also concluded that planned new centres at East Cambridge (and Northstowe in South Cambridgeshire) would contribute towards meeting identified comparison shopping needs arising, and could also potentially accommodate some retail warehouse provision.

### North West Cambridge Supplementary Retail Study (February 2010)

- 2.38 A Supplementary Retail Study was commissioned by Cambridge City Council and South Cambridgeshire District Council in order to provide a more detailed retail planning evidence base for North West Cambridge and to inform a view on potential emerging proposals for foodstore development in the area.
- 2.39 This Study updates the global capacity assessment provided in the 2008 Cambridge Sub-Region Retail Study. Taking into consideration lower expenditure growth rates and a combination of different input assumptions, the updated figures suggest a lower quantum of convenience floorspace capacity to 2021 than that identified within the 2008 Study. The baseline forecasts identify global capacity to support an additional 3,033 sqm net convenience floorspace by 2011, increasing to 8,159 sqm net by 2016 and 12,363 sqm net by 2021. Taking into account pipeline developments, the Study identifies residual capacity to support 333 sqm net additional floorspace at 2016, increasing to 867 sqm net at 2021.
- 2.40 The Study identifies a gap in main foodstore provision in the North West Cambridge area which leads to high levels of expenditure leakage from the area and unsustainable travel patterns. The Study concludes that 'there is a clear need for easily accessible large foodstore provision to serve the main food shopping needs of existing and new residents, to increase choice and competition' (paragraph 3.61).
- 2.41 Four alternative options to meet the identified need at 2021 were examined within proposed local centres across the three North West Cambridge development sites. In the long term (up to 2021) either a single superstore (c.3,500 sqm net) or two supermarkets (2,000 sqm net) were considered the most appropriate main foodstore provision within the planned local centres to meet identified need in the area. Having examined the relative merits of new foodstore provision in the three new centre locations, the Study concluded that either the University Site or the NIAB site would offer a better location for a larger local

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centre than Orchard Park. The Study identifies few differences in the advantages and disadvantages between the University and NIAB sites.

- 2.42 The conclusions of this Study helped to inform the Informal Planning Policy Guidance (IPPG) on Foodstore Provision in North West Cambridge, adopted in March 2011. The IPPG sets out a strategy for foodstore provision in North West Cambridge to include two medium sized supermarkets (2,000 sqm net) to anchor the proposed local centres at the University and NIAB sites. A small supermarket at the local centre at Orchard Park is also supported. The IPPG is a material consideration in the determination of any planning applications for foodstores or the local centres on the three sites.

### Cambridge Cluster at 50 (December 2011)

- 2.43 In May 2010, EEDA commissioned the Cambridge Cluster at 50 study to analyse existing data and consult with businesses and other key stakeholders about the Cambridge economy, 50 years on from the formation of the Cambridge Cluster.
- 2.44 The report explores the expected growth in the functions which cluster in the City Centre, including retail, leisure, business, financial and professional services, over the next 20 years. It examines how this growth is essential to maintain Cambridge's attractions as a service centre for a growing catchment population and increasing numbers of visitors. However it states that the capacity for all of these uses will be a big issue and there is a pressing need to plan creatively and carefully for the future of the City Centre.
- 2.45 The study recommends a masterplan for the central area is developed which considers the area from Castle Hill to Cambridge Leisure Park and from the Backs to Cambridge Retail Park.

## Summary

- The National Planning Policy Framework (NPPF) was adopted in March 2012 and replaces the suite of national Planning Policy Statements, including PPS4. The NPPF clearly advocates a 'town centres first' approach, requiring planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period.

- The adopted Cambridge Local Plan (2006) sets out the Council's adopted policy for retail and leisure uses. The Plan supports the regeneration of the station area and four growth points in the north, south, east and west of the city. The delivery of retail floorspace, as part of mixed use centres in these urban extensions, is also supported.
- Area Action Plans for the East Cambridge and North West Cambridge urban extensions have been adopted and set out the guiding principles for the development of these growth areas. A new district centre is proposed at East Cambridge. However development here will not now take place during the next plan period. Three local centres are proposed in North West Cambridge.
- Cambridge City Council is currently in the process of reviewing their Local Plan and this Study will help to inform that process and provide an update to previous evidence which has been prepared in 2008/9 and 2010.

## 3. Retail and Leisure Trends

- 3.1 To put our assessment of the quality of existing provision and the need for additional retail floorspace and leisure uses in Cambridge into context, it is relevant to consider the wider economic and social trends likely to influence the retail and commercial leisure sectors in the study area moving forwards. This section therefore examines key trends and drivers for change in the retail and leisure industries and outlines those of particular relevance to Cambridge.
- 3.2 Our review draws on a range of published data sources including research by Verdict, Mintel and Experian. Recent studies on the role and performance of high streets nationally and the Government's response, are also set out in this section.

### Economic Outlook

- 3.3 Advice published by Experian (Retail Planner 10.1) continues to present a bleak picture for the economy as the recovery from the recession seems set to remain muted. The weakness of the economy has constrained household spending and the effects of a weak housing market, little growth in consumer credit, low consumer confidence and an uncertain labour market have reinforced the adverse impact of the squeeze on incomes.
- 3.4 It is anticipated that household spending will continue to be constrained by subdued disposable income growth and a weak labour market. Pressures on disposable incomes will limit the extent to which consumers are able to save and consumers will therefore be more considered with their spending decisions – researching to ensure they get the best value for money. In many circumstances, the cost-savings offered by the Internet will be more readily seized.
- 3.5 It is anticipated that consumers will remain cautious with spending not only on discretionary items but also on needs, cutting wastage, which will impact on food & grocery volumes. There will be an increased focus on buying efficiently. Big ticket and home-related purchases will remain low, particularly as uncertainty continues to drive house prices and volumes down, as many are reluctant to move.



- 3.6 As the housing market recovers (expected 2013), certain retail sectors (e.g. home furnishing and DIY) will benefit from pent up demand. However, it is anticipated that sales through the town centre will remain weak with online and out-of-centre retailers continuing to take a greater share and the pent-up demand for furniture, floor coverings and electrical. Space and store numbers in town centre locations is also expected to decline as retailers drive efficiencies by closing underperforming space.
- 3.7 Growth in leisure spending has stalled during the recession, with a significant fall in spending growth between 2007 and 2009. However, the sector has proved generally stable and growth is expected to return as the economy begins to pick-up again over the next few years.

### The Internet/E-tailing

- 3.8 Consistent with wider economic trends, growth in e-Retail declined in 2009 as a result of the recession reducing consumer demand. Austerity cuts on the spending ability of the most prolific online shoppers (35-44 year olds) also had an impact on reduced demand during this period. Overall the pace of growth in online shopping is set to slow down significantly as the channel matures and competition increases (Verdict Research, 2011).
- 3.9 Despite overall more modest levels of growth in online shopping, there will continue to remain reasonable pressure on traditional bricks and mortar retailers. Shoppers are able to select their own retail mix online and shopping centres and high streets will need to compete with this choice, which is not only driven by price and range, but also service and expertise. Online shopping has driven expectations of convenience and service upwards and customers are expecting more from in-store ambience to tempt them to make a purchase (Verdict Research, 2011). Town centres and high streets will increasingly have to provide a shopping 'experience' that the Internet is unable to match.
- 3.10 Trends also show that online and in-store shopping is becoming gradually more blurred as shoppers increasingly research purchases online or in stores which are increasingly becoming showrooms. According to Verdict, in 2010, 63% of shoppers researched goods online before purchasing in stores, an increase from 54% in 2007. At the same time, it is estimated that 29% of consumers researched purchases in store before buying online, representing a huge increase from 13% in 2007 (Verdict Research, 2011).

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## New Technologies

- 3.11 Technological advances will continue to drive changes in retailing, with greater interactions between work, entertainment, social networking and shopping using mobile devices. QR codes (Quick Response codes) have increased consumer and retailer interaction and engagement, enabling customers to scan QR barcodes on their mobiles to gain direct access to the product website, marketing, competitions and product information.
- 3.12 Smartphone's will provide contactless payment services using Near Field Communications (NFC) technology. This will allow customers to make payments via in store terminals making the payment process more convenient. Starbucks is set to launch contactless and mobile payment services in the UK in 2012.
- 3.13 Retailers are also developing 'augmented reality' technology which will merge the physical and virtual worlds to allow retailers (such as Ikea and Tesco) to provide an interactive view of how products such as televisions or furniture, will look in consumers own homes or provide 3D projections of life size products.
- 3.14 Fashion retailers including Net-a-Porter and Clarks are already using augmented reality technology through pointing Smartphone's and tablets at an image or advertisement which triggers video content on the mobile device. This technology brings static adverts to life and allows consumers to view catwalk runways, video advertisements and product information, and to make purchases. Augmented reality will provide an interactive advertising platform for retailers, who will use this technology to break down the barriers between online and in-store shopping.
- 3.15 While the Internet and new technologies pose challenges to the high street, retailers are constantly looking for ways to exploit the trading opportunities available through offering a multichannel shopping experience. The advantages offered by physical stores, in terms of the experience and immediacy of products, will see a network of key stores remain a fundamental component of retailers' strategies to develop a more coherent and integrated multichannel proposition.

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## Sales Efficiency

- 3.16 An efficiency growth rate represents the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (such as rents, rates and service charges) by increasing their average sales densities. The application of a turnover 'efficiency' growth rate is a standard approach used in retail planning studies and in accordance with good practice.
- 3.17 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. Analysis of past data is difficult as sales densities increases have been affected by changes in the use of retail floorspace over the last 20 years, 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.
- 3.18 Following the recession many retailers have struggled to increase or even maintain sales density levels and, together with other financial problems, have led some retailers into closure. With the expectation of weaker expenditure growth, sales density growth is also expected to be lower than previous estimates, unless retailers accelerate store closures and more existing retail stock is taken out of use.
- 3.19 Based on continuing trends towards more modern, higher density stores and the demolition of older inefficient space, Experian expect an efficiency growth rate of 1.9% per annum for comparison goods over the period to 2022. Post 2022, a rate of 1.8% per annum is anticipated which is about half the rate seen during the boom of the 1990s. These rates reflect Experian's assumptions about new floorspace coming into use which is considered realistic given the muted outlook of the economy over the medium term.
- 3.20 Scope for increasing sales efficiency is much more limited for convenience goods. The expanding store portfolios of the main key players will increasingly overlap with the catchments of their existing stores, resulting in the cannibalisation of existing sales as opposed to substantial growth. For convenience goods, Experian expect negative growth (-0.1% per annum) over the period to 2017, with modest growth of 0.2% per annum post 2017.

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## Space Requirements

- 3.21 One of the major trends to emerge from the economic downturn has been the decline in the amount of retail space in town centre locations. This is, in part, a consequence of the harsh economic conditions forcing out independent retailers whose margins became too tight to survive and some multiples which have either collapsed or their store portfolios have shrunk after entering a pre-pack administration. These losses have not been offset by new developments, as many town centre schemes have been put on hold or revised downwards in scale. With online presence allowing national coverage, it is expected that retailers will remain cautious about expansion.
- 3.22 As retailers cut back on space to improve efficiencies and online becomes a more important channel, a new model is emerging in town centres. Retailers are moving towards opening larger flagship stores in strategic locations which are supported by smaller satellite stores and transactional websites. The larger flagships will accommodate the fuller range while smaller stores will offer a more select range supplemented by Internet kiosks allowing access to the wider range.
- 3.23 This model offers many advantages such as lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions. Such models are already being trialled by retailers including Debenhams and House of Fraser. The first House of Fraser.com store, comprising just 140 sqm, opened at Hammerson's Union Square Shopping Centre, Aberdeen in October 2011, followed by a second in Liverpool in November 2011. It is reported that the retailer will open similar stores in locations with strong web sales, but without a store presence. Marks & Spencer is also trialling a boutique offer with sample ranges of clothing combined with online video and ordering capabilities.

## Out-of-Centre

- 3.24 As retailers opt to develop stores in the most strategic and cost effective locations, there has been a notable resurgence to out-of-centre destinations which offer the benefit of lower rents, better space and in most cases, free parking. According to Verdict, out-of-town is the only channel which has seen store numbers increase consistently since 2000. BIS report that the number of out-of-centre stores has increased by up to c.1,800 (25%)

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since 2000; whilst the number of town centre stores fell by almost 15,000 between 2000 and 2009, the majority of which are likely to have been in 'high street' locations.

## Foodstores

- 3.25 In the convenience sector in the recent past, space expansion has been high on the agenda for many grocers. Verdict estimate that between 2010 and 2015, the leading grocers will have increased their space by 2 million sqm - almost double that of the new space opened between 2005 and 2010. In 2011, Tesco and the Co-operative gained a presence in every postcode in the UK, the latter through its acquisition of Somerfield.
- 3.26 However, moving forwards there will be an increasing shift from expansion to refurbishments as coverage nears peak levels, particularly for Tesco and the Co-op. Store refits and refurbishments will be more important with remaining expansion focusing on areas of under representation where there can be gains in market share.
- 3.27 Developing smaller store formats will also become more of a focus as top up shopping is becoming increasingly popular – a response to consumers seeking to reduce waste by moving from weekly shops to frequent smaller shops, or being discouraged from travelling long distances by high fuel prices. Following in the path of Tesco and Sainsbury's, Asda, Morrison's and Waitrose are all expanding smaller concept stores.
- 3.28 The retailers are also continuing to expand their online channels with Tesco adding to its number of dark stores in order to create the capacity needed to grow its online share and sales without impeding on its store portfolio. Both Tesco and Sainsbury's are also refining their Click and Collect offer, with Tesco developing drive-through collection points for groceries which are likely to become increasingly popular as shoppers see the potential to avoid the cost and restrictions of having them delivered.

## Daytime Leisure

- 3.29 The high street has seen a huge increase in the number of cafés and coffee shops since the late 1990s with the advent of brands such as Costa, Starbucks and Nero's being rolled out across the UK, alongside a growth in independent cafes. Less town hall regulation means that many of these cafes have been allowed to put tables and chairs out on pavements and pedestrianised streets, adding a new social dimension to daytime shopping. These venues have become an important part of the economy as Wi-Fi

availability has meant the coffee shop has replaced libraries and, in some cases, offices as a business meeting and working place.

- 3.30 Many councils and traders groups have reacted to competition from out of town shopping malls by seeking to attract more people to their high streets through an annual programme of events, including themed markets (Christmas, Easter, local produce, French, German, etc), street art festivals and sculpture trails, and carnival parades. With the right traffic free environment, these formal events can in turn create a market for informal buskers and street artists to create a more interesting and vibrant high street experience, increasing dwell time and creating in turn a better market for cafés, pubs and restaurants.
- 3.31 The health and fitness sector witnessed major growth during 1990s and into the early 2000s with the growth of chains of private clubs such as Fitness First, David Lloyd, Holmes Place, Esporta and Cannons. This was followed by some consolidation of brands in the mid 2000s alongside a growth in the public sector provision of fitness facilities in direct competition with the private sector. During the recession the sector has remained robust with larger higher end clubs adding spa and family offers to differentiate themselves from the public sector and with the growth of smaller low cost gyms providing a value product priced below that of the public sector.
- 3.32 Other areas of the sport sector have seen growth despite economic challenges. Five-a-side football centres are increasing in numbers and the two major operators, Goals and Powerleague, continue to acquire new sites. These modern facilities provide new generation Astroturf floodlit pitches with on-site parking and a bar.
- 3.33 Commercial sport provision remains a difficult market due to subsidised provision in the public sector, which has benefited from £1.5 billion of investment in the run-up to the Olympics. The Olympics itself has also driven an increase in demand for sporting activity. However, it remains to be seen whether this will lead to any long term increase in participation rates that have hitherto been largely in decline across most sports with certain exceptions.
- 3.34 The children's indoor play market grew during the 1990s, with the growth of play facilities attached to family pub-restaurants such as Brewster's, and among independent providers often in large former factory warehouses. This is still a highly fragmented, fledgling industry, with few multiple chains.
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## The Evening Economy

- 3.35 During the 1980s and 1990s the expansion of the night-time economy was one of the successes of the high street in the diversification and extension of its offer. The combined trends of public sector investment in the arts, greater affluence and a trend towards eating out, and a specific growth in the 'dance scene', all helped to expand the market for pubs, restaurants and nightclubs. However, over the past decade the licensed leisure sector has had a number of far reaching changes and challenges to deal with and there are now further obstacles on the horizon.
- 3.36 The Licensing Act 2003 introduced a split licensing system in which premises are licensed separately from the personal licence holder. This means that an individual with a personal licence is able to own and/or operate licensed premises anywhere in the country, no matter where the licence was originally issued.
- 3.37 When the Act came into force in 2005, late licensing was introduced, allowing pubs to extend their opening hours beyond 11pm, with many city centre pubs taking up this opportunity, especially on Fridays and Saturdays. This has meant that customers no longer need to move from pub to nightclub to continue drinking after 11pm, critically undermining a former competitive advantage for the nightclub industry.
- 3.38 The year 2007 saw the introduction of a smoking ban in England and Wales, an event that has contributed heavily to a downward trend in visitor numbers to drinking establishments. Those pubs and nightclubs that lack the physical space outside to create smoking areas have particularly suffered, as have pubs in areas with a greater proportion of C2, D, E socio-economic group customers within their market area.
- 3.39 In 2012, leisure operators are facing the twin threat of Early Morning Restriction Orders (EMRO's) and the Late Night Levy. Both have serious implications for licensees whose businesses trade between midnight and 6am, that is to say the same nightclubs which have been affected by the extension of licensing and the smoking ban, and could have a significant impact on their bottom line.
- 3.40 The recession has forced many consumers to reduce their leisure spend, which includes expenditure at food and beverage outlets. Although eating out and going out for a drink remain extremely popular activities, both frequency of visit and average expenditure at pubs/bars have fallen significantly in recent years, and there has been an increased

reliance on price discounting / promotional offers within the eating out market to try and stimulate demand. As beer consumption has continued its decline, the pub sector has continued to diversify into food, with many pubs now making more revenue from their food offer than from alcohol.

- 3.41 The evening economy has also been massively affected by new technology. The growth of home entertainment with large wide screen televisions, DVD/Blue Ray, film downloads, Sky football, PlayStation, Xbox, Wii, and sophisticated home gaming technology means that there are now a myriad of leisure diversions at home that no longer require a trip to the pub, nightclub, ten-pin bowling rink or snooker hall. The gaming sector has been hit hard by online gambling which is diverting revenues away from traditional gaming through betting shops, racecourses, bingo halls and bingo halls.
- 3.42 Despite the recession and this growth in home entertainment the cinema sector has remained surprisingly robust in the face of these twin threats by investing in new formats, improved digital production and better catering. In recession, it would appear that the cinema industry offers a relatively cheap and accessible form of leisure for all age and social groups, and perhaps an escape from reality.

### **Role of the Town Centre**

- 3.43 The town centre has been the main shopping channel for the last 30 years. However, its role is set to change dramatically. Emerging trends suggest that it will be used more for leisure and social activities with more bars, restaurants, food outlets and community spaces opening in vacant units. Data from the Local Data Company indicates that town centres with more non-retail outlets have seen an improvement in their performance. Between 2009 and 2011, 114 towns improved their town centre score and reduced their vacancy rate and of these, 60.5% had a lower proportion of retail outlets.
- 3.44 As retailers improve their multichannel offer, town centre stores will be used more to support e-retailing with click and collect points and safe drop boxes for customers to collect their online orders as well as satellite stores opening for customers to make online purchases. As demand for retail floorspace declines, it is anticipated that more secondary and tertiary space which suffers from lower levels of footfall, will increasingly be converted into residential uses.



3.45 In order to ensure that town centres have a viable function moving forwards, it will be important for Councils to aim to drive footfall to turn around their town centres and improve dwell time to increase awareness of offers and impulse purchases. This can be achieved by getting a better understanding of the catchment area and what local people want, improving the mix of retail and non-retail outlets in the centre to make them stay longer, and holding commercial, cultural and community events to create a 'unique selling point' for the town centre to differentiate it from the competition and encourage people to visit. Councils will also need to promote the wider area, to encourage further investment in jobs, and in the town centre, to persuade residents to spend their money in the area and support the town further.

## Summary

- It is evident that the traditional high street faces a number of challenges not least from the tightening of retail spend and changing consumer behaviour but also from increasing competition posed by the Internet and out-of-centre developments. Whilst the future is uncertain, in light of the challenge currently faced, strategies which support the high street are considered ever more vital.
- It is evident that the leisure sector has undergone fairly substantial changes over recent years with certain sectors facing increasing challenges whilst others have experienced strong growth.
- The high street has seen a huge increase in the number of cafés and coffee shops, many of which have been allowed to put tables and chairs out on pavements and pedestrianised streets, adding a new social dimension to daytime shopping. In addition, many town and shopping centre management teams have developed an events programme which has further helped to increase dwell time. This is all for the good as property based shopping competes for retail spending from online traders.
- Although there has been consolidation at the top end, the health & fitness sectors has remained fairly strong during the recession, with continued growth in public sector provision and diversification into stripped down budget gyms in the private sector.
- Whilst, during the 1980s-90s the expansion of the night-time economy was one of the successes of the high street in the diversification and extension of its offer; over the past decade the licensed and leisure sector has had a number of far reaching changes and challenges to deal with and there are now further obstacles on the horizon for those operating.

- The recession has forced many consumers to reduce their leisure spend. This has had a significant affect upon the nightclub, snooker, ten-pin and bingo sectors alongside other pressures from the smoking ban and online gaming.
- Although eating out and going out for a drink remain extremely popular activities, both frequency of visit and average expenditure at pubs/bars have fallen significantly in recent years.
- The cinema sector has also remained strong adapting to recession.

## 4. Cambridge City Centre

- 4.1 In this section we set out our qualitative review of Cambridge city centre. Our analysis draws on the results of our own site visits in November 2012, the results of the household telephone survey and other published data sources including Experian Goad, Focus and EGi.
- 4.2 Cambridge city centre is a prominent regional shopping centre as well as a key tourist destination and university town. Based on the latest survey undertaken by Experian Goad, the city centre currently comprises 216,916 sqm gross retail and service floorspace (including leisure) across 794 units.

**Table 4.1: Cambridge City Centre Composition by the Number of Units**

	Number of Units	% of Total	UK Average (%)	Variance
Convenience	43	5.42	7.98	-2.57
Comparison	353	44.46	33.27	+11.19
Retail Service	82	10.33	13.53	-3.21
Leisure Service	187	23.55	21.94	+1.61
Financial Service	62	7.81	10.94	-3.13
Vacant	67	8.44	12.18	-3.74
<b>TOTAL</b>	<b>794</b>	<b>100</b>	<b>100</b>	-

Source: Experian Goad Category Reports (June 2012 and May 2011)

**Table 4.2: Cambridge City Centre Composition by Floorspace (sqm gross)**

	Floorspace	% of Total	UK Average (%)	Variance
Convenience	5,844	2.69	14.41	-11.72
Comparison	134,887	62.18	36.83	+25.35
Retail Service	7,739	3.57	7.26	-3.69
Leisure Service	43,623	20.11	22.81	-2.70
Financial Service	9,978	4.60	8.37	-3.77
Vacant	14,846	6.84	10.21	-3.36
<b>TOTAL</b>	<b>216,916</b>	<b>100</b>	<b>100</b>	-

Source: Experian Goad Category Reports (June 2012 and May 2011)

- 4.3 It is evident from the above that Cambridge has a strong comparison shopping offer, with 45% of all units, and 62% of the total level of floorspace falling within this goods category. The city centre also provides circa 43,623 sqm of leisure floorspace, a healthy 20% of the total floorspace available, albeit 2.7% below the national average. Leisure tends to cluster at the margins of city centres where it can compete better with retail for rents and space so it should therefore be noted that the above floorspace figures exclude the additional leisure floorspace located just south of the city centre at Cambridge Leisure Park on Hills Road/Clifton Way.
- 4.4 The city centre comprises two distinct areas - the Historic Core and the Fitzroy/Burleigh Street area (which includes the Grafton Centre). These are examined separately below.

## Historic Core

- 4.5 The Historic Core is the traditional city centre which accommodates the majority of the centre's retail and service floorspace alongside the University Colleges and is a key tourist destination. The centre is broadly arranged around a north-south axis along Bridge Street, Sidney Street and St Andrews Street with a western extension encompassing Trinity Street and Kings Parade. Reflecting its historic nature, the centre comprises an irregular layout of traditional cobbled streets and interconnecting passageways which are interspersed with a mixture of historic and listed buildings as well as some examples of more modern architecture. The Historic Core, in its entirety, falls within a designated conservation area.
- 4.6 According to the most recent survey undertaken by Experian Goad (June 2012) the Historic Core comprises c.118,823 sqm gross floorspace across 583 units.

**Table 4.3: Cambridge Historic Core Composition by the Number of Units**

	Number of Units	% of Total	UK Average (%)	Variance
Convenience	28	4.80	7.98	-3.18
Comparison	266	45.63	33.27	+12.35
Retail Service	57	9.78	13.53	-3.76
Leisure Service	149	25.56	21.94	+3.62
Financial Service	39	6.69	10.94	-4.25
Vacant	44	7.55	12.18	-4.63
<b>TOTAL</b>	<b>583</b>	<b>100</b>	<b>100</b>	<b>-</b>

Source: Experian Goad Category Report (June 2012)

**Table 4.4: Cambridge Historic Core Composition by Floorspace (sqm gross)**

	Floorspace	% of Total	UK Average (%)	Variance
Convenience	3,828	2.45	14.41	-11.96
Comparison	95,067	60.92	36.83	+24.09
Retail Service	5,035	3.23	7.26	-4.03
Leisure Service	34,899	22.36	22.81	-0.44
Financial Service	7,349	4.71	8.37	-3.66
Vacant	9,876	6.33	10.21	-3.88
<b>TOTAL</b>	<b>156,053</b>	<b>100</b>	<b>100</b>	<b>-</b>

Source: Experian Goad Category Report (June 2012)

- 4.7 Reflecting the composition of the city centre as a whole, it is evident that the Historic Core is largely dominated by comparison goods retail which equates to 46% of all units and 61% of all floorspace in this part of the City. Approximately 60% of all comparison units located within the historic core are occupied by multiple<sup>1</sup> retailers, which exceeds the national average (42%). The majority of these multiples are concentrated within the centre's two shopping centres (Grand Arcade and Lion Yard) and around Market Place and Sidney Street.
- 4.8 Major multiple retailers represented here include John Lewis (which occupies a five floor unit in the Grand Arcade) and Marks and Spencer (which operates two sizeable units on Market Place and Sidney Street). There is also strong representation from a number of high-end, quality fashion retailers (e.g. Hugo Boss, Gerry Weber, Guess and Gant) as well as the more mainstream, high street retailers (e.g. Topshop, H&M and Zara).
- 4.9 In contrast, the level of convenience goods provision is below average both in terms of the number of units and the quantum of floorspace. As discussed in more detail later, the main convenience goods provision within the Historic Core is provided by the Sainsbury's and M&S Simply Food on Sidney Street. Other convenience goods provision is generally small in scale and includes several bakeries, health food shops, off licences and newsagents. The lack of any large, main foodstore in the city centre is reflective of the centre's constraints in terms of its historic nature and also limited vehicular access.

- 4.10 The Historic Core has a strong leisure services offering comprising approximately 34,899 sqm of floorspace equating to 23% of all floorspace in this part of the city centre which is broadly in line with the national average. This floorspace includes the main clusters of city centre leisure including the café, restaurant and bar quarters along Bridge Street, St. Andrews/Regent Street, King Street and around the Market Place and Kings Parade.
- 4.11 The Historic Core has a below average vacancy rate both in terms of the number of units (-4.6%) and the level of floorspace (-3.9%) which is a strong positive indicator of good health.

### Character Areas

- 4.12 In order to better understand how different parts of the centre currently function, we have divided the Historic Core into different, distinct character areas, discussed in turn below. The location of the character areas are illustrated on Plan 8.

#### *A – Sidney Street/St Andrews Street*

- 4.13 This area encompasses the Grand Arcade and Lion Yard and serves a contemporary high street function, including the main concentration of multiple retailers. Sidney Street and St Andrews Street lie to the east of the shopping centres and are also generally dominated by units falling within the retail categories. Retailers here include Bank, H&M and Zara situated within the Christ's Lane scheme.
- 4.14 The Grand Arcade is the main shopping centre in the Historic Core, comprising c.41,000 sqm gross retail and service floorspace across approximately 54 units. The centre opened in 2008 and comprises a mix of high-end, quality fashion retailers (e.g. Hugo Boss, Gant, L.K. Bennett, Kurt Gieger and Charles Tyrwhitt) amongst a range of more typical high street fashion retailers including Topshop, River Island, Warehouse, Jane Norman and Schuh.
- 4.15 In comparison with the Grand Arcade, Lion Yard now appears more dated and whilst the two shopping centres are seamlessly integrated, in physical terms, there is a perceptible distinction between the two at present. However, Lion Yard is evidently undergoing refurbishment and several of the units which directly abut the Grand Arcade are currently
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<sup>1</sup> Defined as being part of a network of nine or more outlets.

undergoing redevelopment suggesting a clear focus of investment on improving the integration between the two schemes.

### *B – Trinity Street/Market Area/Sidney Street*

- 4.16 The market area and surrounding streets are characterised by a number of high end retailers, including Hugo Boss, Cath Kidston, Jaeger, Reiss, Molton Brown and L'Occitane amongst others alongside more typical high street retailers including TK Maxx, WHSmith and Marks and Spencer.
- 4.17 The retail offer is complemented by a number of service outlets including various cafes and a small selection of restaurants. There is some outdoor seating in the market area although this is relatively limited given the area's potential. The overall environment here is attractive within the setting of a number of grand, historic buildings including the Great St Mary's Church.
- 4.18 A market operates on Market Square on a daily basis which helps to ensure that this area is active and lively. The general market operates Monday to Saturday 10am – 4pm selling items such as clothing, phones and computer accessories, flowers, household appliances, music, souvenirs and bikes. On Sundays a market of local foods, arts and crafts operates between 10am until 4pm.

### *C – Kings Parade*

- 4.19 Running along the western boundary of the shopping area, King's Parade comprises a number of generally small-sized retail and service outlets displaying a traditional character which complements the setting of Kings College. The retail offer here is generally more specialist in nature with a small selection of boutique clothing stores, art galleries, cafes and restaurants.

### *D – Regent Street*

- 4.20 Regent Street generally comprises service operator's particularly financial services including estate agents and banks. There are also a number of leisure services operating along this street, including Pizza Express, Gourmet Burger Kitchen and many independent takeaway outlets. The street links the primary shopping area to the train station via Hills Road local centre.

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### *E – Bridge Street*

- 4.21 To the North of the Historic Core, the area surrounding Bridge Street is less retail and more service orientated. There is a noticeable presence of eating and drinking outlets with representation from a number of multiple restaurant chains including La Tasca, Ask, Prezzo, Café Rouge, Wildwood Café, Cote and Las Iguanas.

### **Fitzroy/Burleigh Street**

- 4.22 The Fitzroy/Burleigh Street area is located within a short walking distance to the north east of the Historic Core. A pathway across the historic Christ's Piece links the two centres. The area comprises two pedestrian high streets (Fitzroy Street and Burleigh Street) and the Grafton Centre.
- 4.23 The Grafton Centre is a purpose-built shopping centre comprising approximately 38,460 sqm gross retail floorspace. In contrast to the Historic Core, 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 Oasis, Next and Boots. 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.
- 4.24 The shopping offer along Fitzroy Street is similarly mainstream with units occupied by multiple retailers including Argos, Superdrug, Caffè Nero and Holland and Barrett. Aside from some more modern units situated to the west (including a c.6,210 sqm gross Primark), the retail offer along Burleigh Street largely comprises independent traders and charity shops in small, poorly configured retail units.
- 4.25 The most recent survey undertaken by Experian Goad (May 2011) indicates that the Fitzroy/Burleigh Street area currently comprises approximately 60,863 sqm gross floorspace across 212 units (Tables 4.5 and 4.6).
- 4.26 As in the Historic Core, the Fitzroy/Burleigh Street area also comprises predominately comparison goods with above average provision both in terms of floorspace (+29%) and number of units (+8%). In contrast, the level of convenience and serve provision is below average. The new Little Waitrose, which opened in 2010, is now the only main



convenience store here following the closure of the M&S Simply Food in the Grafton Centre in 2009, one of many closures for the retailer during the height of the recession.

**Table 4.5: Fitzroy/Burleigh Street Composition by the Number of Units**

	Number of Units	% of Total	UK Average (%)	Variance
Convenience	15	7.08	7.98	-0.91
Comparison	87	41.04	33.27	7.77
Retail Service	25	11.79	13.53	-1.74
Leisure Service	38	17.92	21.94	-4.01
Financial Service	23	10.85	10.94	-0.09
Vacant	23	10.85	12.18	-1.33
<b>TOTAL</b>	<b>212</b>	<b>100</b>	<b>100</b>	<b>-</b>

Source: Experian Goad Category Report (May 2011)

**Table 4.6: Fitzroy/Burleigh Street Composition by Floorspace (sqm gross)**

	Floorspace	% of Total	UK Average (%)	Variance
Convenience	2,016	3.31	14.41	-11.10
Comparison	39,821	65.43	36.83	28.59
Retail Service	2,703	4.44	7.26	-2.81
Leisure Service	8,724	14.33	22.81	-8.47
Financial Service	2,629	4.32	8.37	-4.05
Vacant	4,970	8.17	10.21	-2.04
<b>TOTAL</b>	<b>60,863</b>	<b>100</b>	<b>100</b>	<b>-</b>

Source: Experian Goad Category Report (May 2011)

- 4.27 Although the Grafton Centre has a significant leisure offering on its first floor with the Vue multiplex cinema and a number of café/restaurants, together with a number of cafes along Burleigh Street, the overall leisure offer, in terms of floorspace, equates to just 14% of all floorspace which is 8% below the national average.
- 4.28 The centre's vacancy rate is broadly in line with the national average both in terms of floorspace (-1%) and number of units (-2%).

## Retailer Requirements

4.29 For Cambridge City as a whole (including the Historic Core and the Fitzroy/Burleigh Street area), the Focus database identifies a total of 53 retailer requirements in November 2012. As highlighted in Table 4.7 below, the majority of these requirements are from comparison retailers including high-end quality fashion retailers Tommy Hilfiger and Infinities menswear; specialist retailers including Oil and Vinegar, The Whiskey Shop and Farrow and Ball; to more mainstream high street retailers including GNC, Brighthouse, High & Mighty and Matalan.

**Table 4.7: Published Requirements for Cambridge City**

	No of Units	Min. Floorspace (sqm gross)	Max. Floorspace (sqm gross)
Comparison	32	5,987	12,049
Leisure Services	14	2,411	5,388
Convenience	6	725	1,115
Financial Services	1	5	93
<b>TOTAL</b>	<b>53</b>	<b>9,127</b>	<b>18,645</b>

Source: Co-Star Focus Database (November 2012)

- 4.30 The Focus database also identifies 14 requirements from leisure service operators including five restaurant chains, a mainstream coffee shop operator and a growing craft beer pub chain. There is also a requirement from Champney's looking to operate a high street spa. The remaining leisure requirements are from sandwich bars or take away outlets.
- 4.31 Overall, there is a requirement for between 9,127 – 18,645 sqm gross floorspace.

## Quality of the Environment

4.32 The majority of the Historic Core and Fitzroy/Burleigh Street area is pedestrianised which provides a safe and pleasant shopping environment for pedestrians. Both areas are also protected under conservation area policy which preserves the rich historic character and green spaces which add to the overall quality of the environment. However, the need to preserve such qualities also places a restriction on the scope for further expansion, particularly in the Historic Core.

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- 4.33 There is considered some scope to further improve the shopping environment in the Fitzroy/Burleigh Street area, particularly along Burleigh Street.

## Accessibility

- 4.34 Situated approximately 60 miles north of London, Cambridge is well connected to the capital by rail, air (via Stansted Airport) and road via the M11 motorway which links with the M25. The train station is located to the south of the centre within reasonable walking distance of the Historic Core following a relatively direct route which appears to be well used.
- 4.35 Whilst much of the Historic Core is restricted access to vehicles, there are various car parks situated within close proximity and there is also some limited on-street parking provision. The city centre also benefits from good accessibility bus and the bus station is centrally located within close proximity to both the Historic Core and the Fitzroy/Burleigh area.
- 4.36 It is evident from the household survey results that whilst the majority of visitors (41%) choose to travel to the city centre by car, a higher proportion (57%) choose to travel via more sustainable modes including by bus (16%), park & ride (15%), bicycle (15%), on foot (10%) or by train (1%). The popularity of travelling by bicycle is also evidenced by the high number of bicycles parked in the city centre. Such travel choices are also encouraged by the use of dedicated cycle lanes.
- 4.37 The city is served by five park and ride sites situated in the wider Cambridge area at Milton, Newmarket Road, Babraham Road, Trumpington and Madingley Road. The use of the park and ride facilities are notably more popular by those travelling to the Fitzroy/Burleigh Street area which likely reflects the convenience of the park and ride stop situated directly adjacent to the Grafton Centre.

## Customer Views and Behaviour

- 4.38 The household telephone survey undertaken in October 2012 provides an insight into customer views of the city centre. The key findings of the survey are outlined below:
- The Historic Core is generally a more attractive retail location in its own right attracting 92% of all visitors to the centre whereas the Fitzroy/Burleigh Street area attracts 53% of visitors (including those who indicated that they visit both areas). Overall, 41%

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indicated that they visit both areas highlighting their relative complementarity and the high propensity for linked trips.

- The majority of visitors (84%) use the city centre for the purposes of non-food shopping whereas 40% use it for food shopping.
- The city centre is popular for eating both in the daytime and during the evening attracting approximately 43% of visitors for these activities. Whereas drinking in the evening is a more popular activity (35%) than drinking during the day. Similarly, cultural activities (including the cinema) attract higher levels of visitation in the evenings (46%) relative to the daytime (39%).
- The majority of respondents visit the centre once a week or once a fortnight (22%), whilst 17% visit once a month and 15% visit 2-3 times a week. Few shoppers (less than 6%) visit the city centre everyday.
- The attractive environment is cited by 37% of respondents as what they like most about Cambridge city centre. 23% also cited the good range of chain/well known stores and it being close to home.
- In terms of dislikes, the cost/difficulty in parking is cited by 25% of respondents whilst 'too busy' and 'traffic congestion' are each cited by 10%. The majority (33%) however cite 'nothing / very little'.
- Reflecting the above, 15% of existing visitors would be encouraged to visit the centre more often if there was cheaper parking although 62% indicated that 'nothing' would make them visit more often.

## Summary

- Overall, Cambridge city centre appears to be performing well against a number of the key health check indicators. The centre benefits from an extensive comparison shopping offer which is supplemented by a range of complementary facilities which help to support its role as a 'day-out' destination. There is scope to further enhance the range of complementary facilities and evident demand from a number of leisure service operators seeking representation in the city centre. The opportunities for this, is discussed in more detail in Section 8.
- The centre has a more limited convenience goods offer but this is reflective of the constrained environment and restricted access by vehicles into the Historic Core.

- The city centre benefits from good accessibility by a range of transport modes and there is evidently high usage of these modes as an alternative to the private car. This is perhaps reflective of the access restrictions into the city centre but also the price of parking which was identified as one of the main dislikes of respondents to the household survey.
- The quality of the shopping environment is generally high, assisted by the restricted access to vehicles and the rich historic character of the Historic Core. There is considered scope for some modest environmental improvements in certain areas, particularly Burleigh Street, which is becoming increasingly more secondary in nature.
- The vacancy rate across the city centre is low, which is a strong indicator of good health, particularly in the current economic climate. The low vacancy rate is also reflective of the strong levels of demand for the city centre. However, the centre is also largely constrained, in physical terms, and there is limited scope for further expansion.

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## 5. Cambridge District and Local Centres

- 5.1 In this section we examine the role and health of the district and local centres within Cambridge City. Given the nature and scale of these centres, there is limited published information and our analysis therefore draws largely on data provided by Cambridge City Council and our own site visits carried out in November 2012.
- 5.2 The local and district centres within Cambridge City are broadly distributed across the built up area surrounding the City Centre as illustrated on Plan 2. There are currently three district centres (Mill Road West, Mill Road East and Mitchams Corner) located to the east and north of the city centre. In addition, there are currently a total of 22 local centres which vary in size from Cherry Hinton High Street which comprises 31 units to Campkin Road which comprises just 3 units. Table 5.1 sets out the composition of the District and Local centres in terms of the number of units by retail category.
- 5.3 Based on our recent site visits and the Council's detailed shopping surveys, it is evident that there has been relatively little change in the overall health and retail composition of the District and Local centres since our previous assessment in 2008.
- 5.4 As demonstrated in Table 5.1, the district and local centres generally perform well against the national average in terms of their convenience goods and service provision and, with only a few exceptions, these centres generally have a very low vacancy rate. The level of comparison goods provision in these centres is generally below average, although this is consistent with the role and function of these centres which is more orientated towards meeting the localised top-up food and key service needs of their immediate catchments.
- 5.5 It is evident that there are distinct variations in the scale of the local centres, from 31 retail units at Cherry Hinton High Street to just 3 units in Campkin Road. It is also recognised by the Council that there may be an opportunity to remove or reclassify certain centres and, in some cases, to re-draw the extent of the defined centre boundary.

Table 5.1: Cambridge Local and District Centre Retail Composition

	Convenience		Comparison		Service		Vacant		Total
	No.	%	No.	%	No.	%	No.	%	No.
Mill Road West*	13	15.48	18	21.43	49	58.33	4	4.76	84
Mill Road East*	8	11.94	20	29.85	35	52.24	4	5.97	67
Mitchams Corner*	9	15.52	12	20.69	34	58.62	3	5.17	58
Cherry Hinton High Street	5	16.13	7	22.58	17	54.84	2	6.45	31
Cherry Hinton Road West	3	12.50	5	20.83	15	62.50	1	4.17	24
Hills Road	3	13.04	6	26.09	13	56.52	1	4.35	23
Chesterton High Street	4	21.05	2	10.53	12	63.16	1	5.26	19
Arbury Court	4	25.00	4	25.00	7	43.75	1	6.25	16
Arbury Road/Milton Rd	3	18.75	6	37.50	7	43.75	0	0.00	16
Cherry Hinton Road East	2	15.38	4	30.77	6	46.15	1	7.69	13
Newnham Road	0	0.00	1	7.69	7	53.85	5	38.46	13
Histon Road	4	40.00	3	30.00	3	30.00	0	0.00	10
Norfolk Street	3	30.00	1	10.00	5	50.00	1	10.00	10
Wulfstan Way	3	33.33	2	22.22	3	33.33	1	11.11	9
Barnwell Road	2	25.00	1	12.50	5	62.50	0	0.00	8
Trumpington	1	12.50	2	25.00	4	50.00	1	12.50	8
Grantchester Street	3	50.00	2	33.33	1	16.67	0	0.00	6
Victoria Road	1	16.67	0	0.00	5	83.33	0	0.00	6
Adkins Corner	1	20.00	2	40.00	2	40.00	0	0.00	5
Ditton Lane	2	40.00	1	20.00	1	20.00	1	20.00	5
Green End Road	1	20.00	3	60.00	1	20.00	0	0.00	5
Akeman Street	2	50.00	0	0.00	1	25.00	1	25.00	4
Fairfax Road	1	25.00	1	25.00	1	25.00	1	25.00	4
Kings Hedges Road	1	25.00	1	25.00	2	50.00	0	0.00	4
Campkin Road	1	33.33	2	66.67	0	0.00	0	0.00	3
<i>District Centre Average</i>		14.31		23.99		56.40		5.30	
<i>Local Centre Average</i>		24.67		25.03		42.29		8.01	
<i>UK Average</i>		14.37		36.91		38.41		10.18	
<b>*District Centre</b>									

Source: Cambridge City Council (2012), GVA (November 2012), Experian Goad (January 2012)

- 5.6 In order to examine the relative role of the local centres we have prepared a matrix (included in Appendix 1) which considers the scale, form and location of each centre. We have also had regard to the retail composition of the individual centres, set out in Table 5.1, and the trade draw patterns informed by the household survey evidence (discussed in more detail in Section 6) to inform our understanding on the extent of the catchments these centres currently serve.
- 5.7 As part of the matrix in Appendix 1 we have set out our recommendation for each centre and the justification behind this. Based on the outputs of this exercise, there is potential for three existing Local Centres to be re-classified as District Centres. This is justified given the number and range of retail uses provided within these centres and on the basis that they serve a wider than local catchment.
- 5.8 On the basis of scale, there may also be an *option* for the Council to define a new tier of 'Neighbourhood Centres' to include those smaller centres which serve a more limited local catchment and perform more of a neighbourhood function. However, this change would largely be descriptive. In policy terms, there would be little distinction in the approach to neighbourhood centres than that to local centres. Irrespective of its definition, these centres should be protected to ensure that they continue to adequately meet the day-to-day needs of their immediate local catchment. To summarise, we set out in Table 5.2 below the suggested retail hierarchy with recommended changes shown in **bold**.

**Table 5.2: Recommended Retail Hierarchy**

City Centre	District Centres	Local Centres	Optional Neighbourhood Centres
Cambridge	Mill Road East Mill Road West Mitchams Corner <b>Arbury Court</b> <b>Cherry Hinton High Street</b> <b>Histon Road</b>	Arbury Road/Milton Road Barnwell Road Cherry Hinton Road West Cherry Hinton Road East Hills Road Newnham Road Trumpington	<b>Adkins Corner</b> <b>Akeman Street</b> <b>Campkin Road</b> <b>Chesterton High Street</b> <b>Ditton Lane</b> <b>Fairfax Road</b> <b>Grantchester Street</b> <b>Green End Road</b> <b>King Hedges Road</b> <b>Norfolk Street</b> <b>Wulfstan Way</b> <b>Victoria Road</b>



## Scope for New Centres

- 5.9 As part of our assessment we have also considered the scope to define the following as new or planned centres in the emerging Local Plan.

### Cambridge Leisure Park

- 5.10 Cambridge Leisure Park is located to the south of Cambridge national rail station on the junction between Cherry Hinton Road and Hills Road. Not unsurprisingly, the purpose-built complex is predominantly leisure focused as demonstrated in Table 5.3 below. The range of leisure services on offer includes eight restaurants, predominantly operated by mainstream multiple chains such as Nando's, Bella Italia, Pizza Hut and Frankie and Benny's amongst others. There is also a 9-screen cinema, ten pin bowling, a bar, a club and a hotel.

**Table 5.3: Cambridge Leisure Park Composition by the Number of Units**

	Number of Units	% of Total	UK Average (%)	Variance
Convenience	3	11.54	7.98	3.56
Comparison	3	11.54	33.27	-21.73
Retail Service	2	7.69	13.53	-5.84
Leisure Service	16	61.54	21.94	39.60
Financial Service	1	3.85	10.94	-7.09
Vacant	1	3.85	12.18	-8.33
<b>TOTAL</b>	<b>26</b>	<b>100</b>	<b>100</b>	<b>-</b>

Source: Cambridge City Council / GVA (2012)

- 5.11 The area's predominant leisure function is supplemented by other town centre uses including three convenience stores (Sainsbury's Local, Tesco Express and Mace), three comparison units (a cycle shop, bridal shop and games shop) and other services including a hair salon, an estate agent and an optician. These other uses collectively equate to approximately 35% of all uses in the area and are therefore regarded as ancillary to the area's main leisure function.
- 5.12 It is evident from the results of the household survey that the area is currently serving a limited function as a top-up food shopping destination. Whereas the key leisure uses (namely the cinema and bowling alley) attract visitors from across the survey area. On

this basis the area is clearly performing the role of a key leisure destination serving the leisure needs of the wider Cambridge area.

- 5.13 Whilst there are other town centre uses on offer, these uses are clearly ancillary to the main leisure function. As such we do not consider that the Leisure Park currently satisfies the definition of a centre for the purposes of the NPPF. However, it is recognised that there are a number of new housing developments coming forward in the immediate area and scope for further residential development over the plan period which would be likely to reinforce its role within its immediate catchment. As such we consider there would be some merit in protecting both the retail and leisure uses in this location over the plan period.

### Carlton Way

- 5.14 Carlton Way is located to the north of the City Centre and comprises a small parade containing two shop units occupied by One Stop and a fishing tackle shop. Adjacent to the parade there is a public house. Based on the number of retail uses we consider there scope to define Carlton Way as a local or neighbourhood centre. This will enable the Council to ensure that these uses, particularly the convenience store, are protected moving forwards.

### Hawthorn Way

- 5.15 Hawthorn Way is located to the north east of the city centre, at the junction between Chesterton Road and Chesterton Lane. There are five retail units situated either side of Hawthorn Way which include a Spar convenience store, a continental delicatessen and two hair salons. The remaining unit is vacant. Based on the number of retail uses there is scope to define Hawthorn Way as a local or neighbourhood centre. This will enable the Council to ensure that these uses, particularly the convenience stores, are protected moving forwards.

### Station Area

- 5.16 Major mixed-use development is currently under construction around the station area in accordance with the Council's long-term aspirations for the regeneration of the area. Alongside a new transport interchange and station square, the development will deliver 331 new homes, 1,250 units of student accommodation and local shops and services.

- 5.17 In terms of the retail component, the planning consent permits up to 5,225 sqm gross new retail floorspace. Co-op have recently opened, occupying approximately 354 sqm gross in Block M5 which fronts onto Hills Road. Aside from a Costa Coffee which has also recently opened, it is not yet known what type of retail will take up the remaining 4,871 sqm gross retail permitted. However, given the Co-op's presence (and the nearby M&S Simply Food at the Station) we consider it unlikely that there will be any substantial additional convenience goods component.
- 5.18 Whilst the new facilities will clearly serve the needs of the new resident and student population coming forward on the site, given its location on Hills Road and around the station, we consider it likely that they will perform a wider than purely neighbourhood function. Depending ultimately on the nature of new facilities which come forward alongside the Co-op, we consider there is potential for a new local centre to be defined in this location.

### North West Cambridge

- 5.19 The adopted local plan identifies two sites in North West Cambridge as areas of major change: the land between Madingley Road and Huntingdon Road ("the University site") and the land between Huntingdon Road and Histon Road ("the NIAB site"). Together these sites comprise the North West Cambridge growth area.

#### *The University Site*

- 5.20 The North West Cambridge AAP was adopted in October 2009 in relation to the University site. The purpose of the AAP is to guide the planning of the area and in particular to ensure a balance is struck between meeting the long-term development needs of the University and creating a sustainable urban extension of Cambridge.
- 5.21 A planning application for the site was submitted by the University in October 2011 proposing a mixed use university-led development including 3,000 dwellings, 2,000 units of student accommodation, 6,500 sqm of senior living accommodation and 100,000 sqm of employment land amongst other commercial and community uses. The proposal also includes up to 5,300 sqm gross retail floorspace (Use Classes A1 to A5), to include a 2,000 sqm net supermarket, which will perform a key anchor role for the proposed local centre envisaged by the AAP.

- 5.22 The scale of the proposed supermarket anchor (2,000 sqm net) and ancillary retail uses (up to 1,300 sqm net A1-A5 uses) would be consistent with the definition of a local centre (as defined in Annex B of PPS4 which remains a useful guide). Given the University's stated intention to deliver a mix of small-scale shops and services which will be ancillary to and complementary in nature to the anchor supermarket, we consider it likely that these facilities will perform a coherent function as a local centre serving the needs of the new residential and employment communities and the University campus. As such, it would be appropriate to identify a planned new local centre in this location as part of the emerging Local Plan.

#### *The NIAB Site*

- 5.23 The NIAB site is situated to the east of Huntingdon Road. Part of the site (NIAB 1) is situated within Cambridge City's administrative area. The frontage of the site facing Huntingdon Road is currently being built out and will provide 187 new homes. An application for the remainder of the site has a resolution to grant planning permission for 1,593 dwellings alongside a range of community uses, a supermarket and up to 6 retail units (A1-A5 uses). It is anticipated that these facilities will collectively form and function as a new local centre serving the needs of new residents on the site. As such it would be appropriate to identify a planned new local centre in this location as part of the emerging Local Plan.

#### *Clay Farm*

- 5.24 Within the southern fringe growth area, planning permission has been granted for the residential-led mixed use development of Clay Farm which will deliver 2,300 dwellings, new community uses and local retail facilities including a 500 sqm gross convenience store and up to 1,750 sqm gross of other retail uses (A1-A5). It is anticipated that these facilities will collectively form and function as a new local or neighbourhood centre serving the needs of new residents on the site. As such it would be appropriate to identify a planned new local or neighbourhood centre in this location as part of the emerging Local Plan.

## **Summary**

- Since 2008 it is evident that there has been limited change in the retail composition and overall health of the district and local centres.

- However, recognising the variations in the scale and function of the centres, we consider there is an opportunity for the Council to re-classify certain centres, including an *'option'* to define a new tier of 'Neighbourhood Centres'..
- We have assessed the potential for new centres to be defined in the emerging Local Plan. This includes potential for the leisure park to develop into and function as a district centre, for Carlton Way and Hawthorn Way to be defined as local/neighbourhood centres, and for a new local centre to be defined as part of the Station Area development.
- On the basis of major planned new residential development in North West Cambridge and the Southern Fringe we also consider it appropriate to identify planned new local or neighbourhood centres in these locations.

## 6. Cambridge Out-of-Centre

### Convenience Stores

- 6.1 Plan 3 illustrates the main foodstore provision within the City which indicates that the main, large foodstores serving the City are predominantly located out-of-centre. These include:

#### *Sainsbury's, Coldhams Lane*

- 6.2 The Sainsbury's superstore at Coldhams Lane is the largest foodstore in the City comprising 4,165 sqm net, of which 2,986 sqm net (70%) is currently dedicated to the sale of convenience goods. Sainsbury's is the most dominant foodstore in Zone 1 where it attracts a 24% market share. The store also attracts a reasonable market share from Zones 2 (14%) and 4 (10%) and to a lesser extent Zones 9 (8%) and 3 (7%).

- 6.3 As discussed in more detail in Section 7, there is an extant planning consent for a 2,265 sqm net extension to this store which has yet to be implemented.

#### *Tesco, Cheddars Lane*

- 6.4 The Tesco, Cheddars Lane is situated to the east of the city centre, north of Newmarket Road. The store comprises approximately 4,081 sqm net of which we estimate 2,653 sqm net (65%) is dedicated to the sale of convenience goods. Reflecting its position in the survey area, this store attracts the highest market share in Zone 4 (25%). Overall however, the Tesco is less influential across the survey area than the Sainsbury's, Coldhams Lane, attracting a market share of 8% in Zones 3 and 9, and 4% in Zones 1 and 2.

#### *Asda and M&S Simply Food, Beehive Centre*

- 6.5 The Beehive Centre is located off Newmarket Road in relatively close proximity to the Tesco, Cheddars Lane. The Asda is the main foodstore comprising approximately 3,790 sqm net of which we estimate c.2,653 sqm net (70%) is dedicated to the sale of convenience goods. Based on the survey results, the Asda is less influential across the survey area than both the Sainsbury's, Coldhams Lane and the Tesco, Cheddars Lane. However, it is possible that the household survey has underestimated the performance of

this store which was busy at the time of our site visits and displaying signs of overtrading. This is discussed in more detail in the following section.

- 6.6 The M&S Simply Food store is situated in close proximity to the Asda store within the Beehive Centre complex. The store comprises c.1,081 sqm net of which we estimate 973 sqm net (90%) is dedicated to the sale of convenience goods.

### *Waitrose, Trumpington*

- 6.7 The Waitrose, Trumpington lies to the south of the city centre on the outskirts of Trumpington. The store comprises c.2,976 sqm net floorspace of which we estimate 90% (2,678 sqm net) is dedicated to the sale of convenience goods. Reflecting the location of this store in the south of the survey area, it attracts the highest market share in Zones 2 (33%) and 5 (20%).

## Retail Warehousing

- 6.8 Retail warehousing provision is largely concentrated within an area to the east of the city centre (Plan 5), predominantly within the retail parks situated off Newmarket Road and Coldhams Lane.

- **Beehive Centre** – 13,593 sqm net (Multiyork, Next Home, Oak Furniture Land, Maplin, B&M Homestore, Homesense, DW Sports, Carpetright, Dreams, Hobbycraft, Pets at Home, TK Maxx and Toys R Us)
- **Cambridge Retail Park** – 16,984 sqm net (Homebase, ScS, Dunelm Mill, Harveys, Furniture Village, Halfords, Burton/Evans/Dorothy Perkins, Sports Direct, Argos, Currys/PC World and Boots)

- 6.9 In close proximity to the above, there are four standalone retail warehouses situated on Newmarket Road occupied by B&Q, DFS, Staples and the former Comet unit which has recently been taken over by Wickes.

## Summary

- It is evident that there are several large out-of-centre foodstores within the City which together dominate shopping patterns across the 'core area' (Zones 1-4).

- There is also good provision of retail warehousing. However, whilst many of these are occupied by traditionally bulky-goods type retailers, there is some overlap with high street retailers (e.g. Boots, Argos, Burton/Evans/Dorothy Perkins).



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## 7. Quantitative Need Assessment

7.1 In this section we estimate the current performance of Cambridge City Centre, the district and local centres and the main out-of-centre retail provision, as the basis for forecasting the need for further retail floorspace to the period 2031 (incorporating interim years of 2017, 2022 and 2027). The capacity tables accompanying our assessment are attached in Appendix 2 and 3.

7.2 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 to model the existing flows of available expenditure to each retail destination. 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 catchment 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 on 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.

7.3 Building on the baseline position, we have explored the capacity for further convenience and comparison goods retail floorspace within the City.

### Data Inputs

#### Survey Area and Household Survey

7.4 In order to provide detailed factual information on shopping patterns in the City, we commissioned a new household telephone survey covering 1,000 households. GVA designed the survey questionnaire in consultation with Council Officers and NEMs – who undertook interviewing and data processing. The survey area is illustrated on Plan 1.

- 7.5 It should be noted that the results of the survey are slightly biased towards female respondents and those aged above 35 and there is a lack of representation from students. The latter reflects the likelihood that students will mainly use a mobile as opposed to a landline phone and are therefore difficult to target through these types of surveys. Whilst not ideal, this lack of representation does not substantially undermine the robustness of this study. We have had regard to the limitations of the household survey as part of our analysis.
- 7.6 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.
- 7.7 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 70%/30% main to top-up food weighting. This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore, for each survey zone.
- 7.8 The survey also includes 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 on that goods type. This process will establish 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.,
  - Personal, luxury goods and recreational goods.

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## Estimates of Population in the Survey Area

- 7.9 The baseline population estimates and forecasts have been drawn from the Experian e-marketer in-house system. This provides estimates of population based on trendline projections and the 2001 census for small, localised areas
- 7.10 The baseline population of the survey area is currently 300,187. This is forecast to increase to 313,330 by 2017, to 326,158 by 2022, to 339,445 by 2027 and 341,747 by 2031. This equates to an overall growth of 14% across the whole survey area. This is consistent with the rate of growth anticipated by the Council.

## Available Expenditure in the Survey Area

- 7.11 The Experian e-marketer system provides estimates of the per capita expenditure for convenience and comparison goods in 2010 prices. 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 survey area.
- 7.12 We have made appropriate deductions for special forms of trading (SFT) which represent expenditure not available to spend in the shops based on the most up to date information provided by Experian. SFT includes the Internet, mail order sales, stalls, markets and other non-store sales, although the Internet largely dominates this retail category.
- 7.13 Experian anticipate that non-store retailing (led by the Internet) will increase at a faster rate than total retail sales over the medium term. It is estimated that 85% of the UK adult population were Internet users at the end of 2011, so growth of the Internet user base will be less of a driver than in the past 10 years, although these same people will use the internet more frequently. However, it is anticipated that growth momentum will be sustained as new technology such as m-commerce (mobile phones) and the development of interactive TV shopping boost Internet retailing. The deductions we have applied in respect of SFT (set out in Table 2 in Appendix 2 and 3) moving forwards take these factors into account.
- 7.14 We have applied growth rates for comparison goods of 0.6% for the period 2010 to 2011; 1.4% for the period 2011 to 2012; 2.6% pa from 2012 to 2017; and 2.9% pa from 2017 onwards. For convenience goods we use growth rates of -3.0% between 2010 and 2011; 0.1% between 2011 and 2012; 0.3% pa from 2012 to 2017; 0.7% pa from 2017 to 2022; and

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0.8% pa from 2022 onwards. These growth rates are based on the latest economic forecasts published by Experian Business Strategies (Retail Planner 10.1).

- 7.15 We expect spending on comparison goods to grow faster than on convenience goods, as the scope to purchase more food is limited. These assumptions take into account current economic circumstances and the effects of the recession, which have had a significant impact on forecast levels of growth expected over the period to 2031. Taking these considerations into account, we have generated expenditure by Zone to highlight variations across the survey area and grown them accordingly to 2017, 2022, 2027 and 2031 (i.e. 5 year forecasting periods as required by the NPPF).
- 7.16 Table 3, Appendix 2, applies per capita expenditure within each zone to baseline population forecasts, which indicates that total available convenience goods expenditure within the survey area is currently £536.4m. This is forecast to grow to £562.7m by 2017; to £600.9m by 2022; to £648.5m by 2027; and to £671.9m by 2031. This equates to an overall growth of £135.6m (25%) between 2012 and 2031.
- 7.17 Table 3, Appendix 3, sets out the total available comparison goods expenditure within the survey area by again applying per capita expenditure within each zone to the baseline population forecasts. This indicates that total available comparison goods expenditure within the survey area is currently £855.2m. This is forecast to grow to £974.8m by 2017; to £1,139.7m by 2022; to £1,369.2m by 2027; and to £1,543.8m by 2031. This equates to an overall growth of £688.6m (81%) between 2012 and 2031.

### Floorspace Data

- 7.18 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), the Trevor Woods 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 as most superstores include a proportion of non-food floorspace. This accords with the expenditure data and the expenditure assumptions used.

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## Convenience Goods Capacity Projections

### Cambridge City Centre

- 7.19 Our methodology estimates the trade draw of Cambridge City Centre for convenience goods (Table 4, Appendix 2). This includes an examination of the trade drawn to the Sainsbury's and M&S Simply Food on Sidney Street which are the most notable convenience stores in the Historic Centre. We have also examined the trade draw to the Little Waitrose on Fitzroy Street. Other convenience goods provision in the city centre is generally small in scale and includes several bakeries, health food shops, off licences and newsagents.
- 7.20 We estimate that the Sainsbury's, Sidney Street currently has a convenience goods turnover of £6.5m. Based on a convenience goods floorspace of 1,260 sqm net this suggests that the store has an average convenience goods sales density of only £5,194 per sqm net. This is less than half the sales density we would expect the store to achieve based on the company average (£12,526 per sqm). We estimate that the M&S Simply Food on Sidney Street is trading at a similar level, with an estimated turnover of £3.7m, this equates to a sales density of just £3,300 per sqm net.
- 7.21 Given the prominence of Cambridge as a major tourist destination and student town, we consider it unlikely that the convenience stores in the city centre are substantially underperforming to the extent suggested by the household survey. Based on our site visit observations, we consider that both these stores are actually likely to be trading well.
- 7.22 In the Fitzroy/Burleigh area of the city centre, we estimate that the Little Waitrose on Fitzroy Street is currently turning over c.£2.5m. Based on an estimated convenience goods floorspace of c.265 sqm net, this equates to a sales density of £9,323 per sqm net which, whilst still below, is more consistent with expectations based on company average (£11,320 per sqm).
- 7.23 We estimate that 'other' convenience goods provision in the town centre has a collective turnover of £4.3m. Based on an estimated convenience goods floorspace of 1,528 sqm net, this equates to a sales density of £2,839 per sqm net.
- 7.24 Closer analysis indicates that the city centre convenience stores are drawing the majority of their trade from within Zone 2 where they achieve a combined market share of 15%.

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The centre's influence over the City's other 'core' zones (Zones 1, 3 and 4) is more limited (3.3% - 5.2%). Beyond these core zones the city foodstores achieve a 3% market share in Zone 5, but 1.1% or less in the remaining outer zones. This is not unexpected given the more localised nature of convenience goods shopping and the proximity of larger, competing foodstores both within the district and local centres, but also out-of-centre.

- 7.25 Overall we estimate that the city centre has a baseline convenience goods turnover of circa £17m. This equates to an overall market share of just 3% across the whole survey area. However, it should be noted that this does not take into account any spend generated by tourists, students and those people working in the city centre who are also likely to be using these stores and therefore contributing to their overall turnover.

### District and Local Centres

- 7.26 The household survey has only identified market shares for a selection of the district and local centres (listed in Table 5, Appendix 2). This is not unexpected given the localised nature of these centres and the likelihood that local residents will regularly use more than one destination for top-up food shopping.
- 7.27 Of those identified by the household survey, we estimate that the main convenience stores in the district and local centres have a combined turnover of £63.4m which exceeds our estimate based on benchmark sales densities (£40.3m). Consistent with the findings of the 2008 Study, a number of these stores are trading significantly above company average including the stores at Histon Road (Aldi, Co-Op and Iceland), the Co-op, Grantchester Street and the Co-op, Mitchams Corner. Other stores also performing well include the Co-op, Milton Road; Budgens, Adkins Corner; local stores on Mill Road East; and the Tesco Express, Cherry Hinton High Street.

### Cambridge Out-of-Centre Foodstores

- 7.28 Our analysis of the household survey results has identified the trade draw and catchment areas of the principal out of centre foodstores in the City.

#### *Sainsbury's, Coldhams Lane*

- 7.29 The Sainsbury's superstore at Coldhams Lane is the largest foodstore in the City comprising 4,165 sqm net, of which 2,986 sqm net (70%) is currently dedicated to the sale of

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convenience goods. We estimate that the store currently has a turnover of approximately £47.1m, which equates to 34% of the combined turnover of the out-of-centre foodstores in the City.

- 7.30 Based upon the turnover of the store and with a net convenience goods sales area of approximately 2,986 sqm, we estimate that the store is currently achieving a sales density of approximately £15,825 per sqm net. This exceeds the level based upon Sainsbury's company average sales density (£12,789 per sqm net) and suggests that the store is overtrading by over 25%.

#### *Tesco, Cheddars Lane*

- 7.31 We estimate the Tesco store currently has a turnover of approximately £28.6m, which equates to 20% of the combined turnover of the out-of-centre foodstores. Based on this turnover, and with a net convenience goods sales area of 2,653 sqm, the sales density of the store is approximately £10,766 per sqm net. This sales density falls below expectations based on Tesco's company average (£12,842 sqm net) and suggests that the store is marginally under trading.

#### *Asda, Beehive Centre*

- 7.32 We estimate that the Asda at the Beehive Centre currently has a turnover of approximately £23m. Based on this turnover and a net convenience goods sales area of 2,653 sqm, the store is currently achieving a sales density of £8,658 per sqm. This is almost half expectations based on Asda's company average (£15,390 per sqm) and suggests that the store is substantially under trading.

- 7.33 However, at the time of our site visit, the store appeared to be busy and a number of shelves required re-stocking, the bread, milk and meat aisles in particular. These types of observations are typically associated with stores that are overtrading and it is therefore likely that the household survey has underestimated the market share and turnover of this store.

#### *M&S Simply Food, Beehive Centre*

- 7.34 The M&S Simply Food is situated in close proximity to the Asda at the Beehive Centre. We estimate that the M&S store has a turnover of approximately £4m. Based on a net sales area of c.987 sqm, this equates to a sales density of just £4,087 per sqm net which, like the

Asda, is below company average (£10,833 per sqm net) and suggests that the store is substantially under trading. Again, this is not wholly consistent with our site visits at which time the store was busy and appeared to be trading well.

### *Waitrose, Trumpington*

- 7.35 Situated to the south of the City Centre, the Waitrose is the main foodstore serving the Trumpington area. We estimate that the store comprises approximately 2,678 sqm net and has a turnover of approximately £37.7m, equating to a sales density of £14,080 per sqm net. This is a strong performance relative to the company's average (£11,320 per sqm net).
- 7.36 It is evident from the household survey results that these out of centre foodstores attract 26% of total available spend generated within the survey area. As we would expect, given the more localised nature of convenience goods shopping, these stores combined attract a much higher market share in each of the core zones: Zone 1 – 46.2%; Zone 2 – 53.1%; Zone 3 – 26.3%; and Zone 4 – 45.3%.

### Beyond Cambridge City

- 7.37 In addition to the out-of-centre stores located within the City, we have also identified several out-of-centre stores within South Cambridgeshire District and beyond which have an influence over shopping patterns within the City. These include Tesco, Bar Hill; Tesco Extra, Royston; Tesco, Cherry Hinton; Tesco, Milton; and Morrisons, Cambourne. Together, these stores attract 22% of expenditure generated within the core zones (Zones 1-4).

## Convenience Goods Capacity

- 7.38 We have examined the capacity for further convenience goods floorspace at the global level for the City up to 2031, incorporating the interim years of 2017, 2022 and 2027. It is important to note that capacity forecasts become increasingly open to margins of error over time and projections over the longer-term should be treated with caution. As such it will be necessary for the Council to update these forecasts over the Local Plan period.
- 7.39 In terms of convenience goods commitments coming forward in the near future, we have examined the following schemes provided by the Council:
- Extension to Sainsbury's, Coldhams Lane (929 sqm net)



- New Co-op, Block M5, CB1 Station Area redevelopment (219 sqm net)
- Residual floorspace at CB1 Station Area redevelopment (741 sqm net)
- New foodstore at North West Cambridge (2,000 sqm net)
- New Foodstore at NIAB (2,000 sqm net)
- New convenience store at Clay Farm (325 sqm net)

7.40 Based on our understanding of when these developments are likely to be delivered, we have factored in the extension to the Sainsbury's and the convenience floorspace at the Station development at 2017 and the remaining commitments at 2022.

7.41 It is acknowledged that the planned additional floorspace at the Sainsbury's, Coldhams Lane will form an extension to the existing store and that this could, to some extent, dilute existing convenience sales. However, we disagree with Sainsbury's assumption that the extended floorspace will achieve 50% of the existing turnover and, for the purposes of robustness we have therefore tested the 'worst case' assuming the extended floorspace achieves the company's average sales density (£12,526 per sqm net).

7.42 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 £12,000 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 Co-op currently has a sales density of £7,530 per sqm net and Lidl £2,987 per sqm net

7.43 Based on the population and expenditure growth, and the detailed performance analysis of existing floorspace in the City, and taking into account existing commitments for additional convenience goods floorspace, we identify no surplus capacity to support further convenience goods floorspace in Cambridge City over the plan period (i.e. up to 2031).

7.44 In the short-medium term, this is largely as a result of the planned extension to the Sainsbury's superstore at Coldhams Lane and new convenience goods provision coming forward in North West Cambridge and the southern fringe.

- 7.45 As highlighted in Table 7.1 below, this notional oversupply will reduce over time, in line with population and expenditure growth. However, as highlighted above, these longer term projections should be treated with caution given growing margins of error over a long time period.

**Table 7.1: Baseline GLOBAL Capacity Forecasts for Convenience Goods**

	2017	2022	2027	2031
Residual Expenditure (£000)	-16,665	-52,805	-37,000	-30,483
<b>Floorspace Capacity (sqm net)</b>	<b>-1,389</b>	<b>-4,357</b>	<b>-3,022</b>	<b>-2,465</b>

Source: Table 11, Appendix 2

- 7.46 Whilst the household survey is likely to have underestimated the performance of certain stores (e.g. the city centre stores and those at the Beehive), this will be offset by the suggested 'over-trading' of other stores (e.g. Sainsbury's, Coldham's Lane). By forecasting capacity on a global basis (i.e. City-wide) the over/under-trading of stores balances out.
- 7.47 Similarly, whilst students are under-represented by the household survey, as a population, the spend they generate has still been factored into the global capacity forecasts. Those working in Cambridge, and living within the study area have also been factored in. The only additional expenditure not accounted for is tourism spend. This will inevitably increase overall capacity although not to the extent that it would offset the identified oversupply in the short-medium term.

## Comparison Goods Assessment

### Cambridge City Centre

- 7.48 Table 4, Appendix 3 indicates the trade draw of Cambridge City Centre (including both the Historic Core and the Fitzroy-Burleigh Street area) based on the results of the household survey. Plan 6 illustrates the extent of the centre's influence throughout the defined survey area highlighting variations in market share. It is evident that Cambridge has a strong influence which extends across all zones in the survey area. The centre is evidently more dominant in Zones 1, 2, 3 and to a lesser extent Zone 4 which represent the 'core area'.

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- 7.49 Within the whole survey area, Cambridge City Centre draws 57% of total available comparison goods expenditure (£483.3m). This represents a 5% decline in market share since 2008 which is unexpected given the opening of the Grand Arcade which should have boosted the City's market share. However, it would appear that whilst the city centre's market share has apparently declined, the market share of the out-of-centre retail warehousing provision off Coldhams Lane has increased from 15% in 2008 to 24% in 2012. This reinforces the need for the City Council to maintain the complementary role of the out-of-centre retail warehousing and resist development here which would have the effect of creating direct competition with the city centre.
- 7.50 On the basis of current market shares, and allowing for inflow (36%<sup>2</sup>), we estimate the city centre has an overall comparison goods turnover of £657.3m which equates to a sales density of approximately £7,497 per sqm net which, consistent with a fall in market share, represents a decline in performance since 2008. Such a decline is also consistent with wider retail trends and in any event, still represents a good performance.
- 7.51 The allowance for inflow (36%) equates to approximately £174m at 2012. This is a substantial level of inflow but can be attributed to Cambridge's attraction as a tourist destination. There is no definitive picture of expenditure generated by tourists, which may ultimately be greater than the level of inflow identified by the 2008 in-centre survey. Whilst a greater level of inflow would have a bearing on the baseline turnover of the city centre, it would not have a significant effect on capacity which is forecast on the basis of growth.

### Out-of-Centre Retail Warehousing

- 7.52 On the basis of current market shares, we estimate that the combined turnover of the City's out-of-centre retail warehouse provision is £202.5m. Based on an existing retail floorspace of approximately 38,428 sqm net, the results of the telephone survey suggest that collectively the units have a sales density of approximately £5,269 per sqm net. Based upon a company average sales density for the retail warehouse units combined of £3,729 per sqm net our assessment indicates that this area of retail warehousing is currently performing very well and exceeding expectations.

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<sup>2</sup> Inflow of 36% based on the results of the 2008 in-centre survey.

## Comparison Capacity Forecasts

- 7.53 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. Drawing on the latest advice published by Experian (Retail Planner 10.1), we have assumed an annual growth in existing sales per sqm net of 1.9% between 2012 and 2022, and 1.8% beyond 2022.
- 7.54 There is no policy support for out-of-centre comparison floorspace to improve its sales efficiency. However in practical terms, and as is evident from this Study and current trends, this type of floorspace is likely to increase overall sales per sqm in any event. We have therefore allowed for such improvements as part of our capacity forecasts for comparison goods. This is not to say that there is not scope for improvements in existing centres to claw back market share and expenditure currently directed towards out-of-centre locations.
- 7.55 We have also factored in two known commitments for additional comparison goods floorspace: the extension to the Sainsbury's, Coldhams Lane; and a new retail unit at the Beehive Centre (Unit 1A) which will create an additional 695 sqm of retail sales floorspace which we have assumed will come forward for comparison goods. At this stage the end-user for this unit is not known and we have therefore estimated the potential turnover of this new floorspace adopting a sales density of £5,000 per sqm (see Table 11, Appendix 3). In practice, the sales density of this unit could be lower if the unit is occupied by a traditional bulky goods retailer.
- 7.56 Table 7.2 below illustrates the global comparison goods capacity for the City. These figures are based on constant market shares and factor in the above commitments, but do not take into account the utilisation of existing vacant floorspace.

**Table 7.2: GLOBAL Capacity Forecasts for Comparison Goods (Baseline)**

	2017	2022	2027	2031
Residual Expenditure (£000)	23,081	93,424	225,541	315,679
<b>Floorspace Capacity (sqm net)</b>	<b>3,820</b>	<b>14,141</b>	<b>31,226</b>	<b>39,976</b>

Source: Table 12, Appendix 3

- 7.57 In the immediate short-term we identify capacity to support c.3,820 sqm net of additional comparison goods floorspace in the City. By the virtue of forecast growth in population and expenditure, this is forecast to increase to almost 40,000 sqm net by 2031. As for convenience goods, these longer term forecasts should be treated with caution and updated at regular intervals during the course of the Local Plan period.
- 7.58 Given the extent of Cambridge's catchment it is also necessary to have regard to other major planned developments coming forward in the wider sub-regional area which have potential to influence shopping patterns within Cambridge's catchment and divert expenditure currently being drawn to Cambridge. This will consequently affect the level of capacity forecast for the City.
- 7.59 In order to understand the sensitivity of wider developments on forecast capacity we have tested the implications of two major schemes coming forward in the wider area over the plan period; these being the planned expansion of Peterborough City Centre and the enhancement of the comparison shopping offer in Huntingdon. Over the longer term, we have also taken into account the planned new town centre at Northstowe which, like Peterborough and Huntingdon, is likely to claw back a proportion of spend currently directed towards Cambridge.
- 7.60 In order to estimate the potential claw back to Peterborough and Huntingdon as a result of planned investment in these centres, we have undertaken a high level exercise which draws on recent survey evidence covering the wider area to the west of Cambridge<sup>3</sup>. We estimate that there is potential to Peterborough to claw back c.£24.2m of expenditure currently drawn to Cambridge from within its catchment at 2017, and for Huntingdon to claw back c.£16.2m at 2017 equating to a total diversion of £40.3m at 2017.
- 7.61 We have undertaken a similar exercise for Northstowe assuming that the new town centre will attract a proportion of expenditure generated within Zones 3 and 8 which is currently directed towards Cambridge City Centre. At 2022, we estimate that this could equate to a diversion to £58.8m, increasing to £79.9m by 2031. Table 7.3 sets out the outputs of this sensitivity analysis.
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<sup>3</sup> September 2012 survey evidence used to inform the Peterborough Retail Study Update (January 2013)

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**Table 7.3: GLOBAL Comparison Capacity Forecasts – Wider Development Sensitivity Testing**

	2017	2022	2027	2031
Residual Expenditure (£000)	-17,252	-12,101	98,501	170,280
<b>Floorspace Capacity (sqm net)</b>	<b>-2,855</b>	<b>-1,832</b>	<b>13,637</b>	<b>21,563</b>

Source: Table 13, Appendix 3

- 7.62 Clearly the consequence of wider developments could be to meet all available need in the City in the short-medium term. Over the longer term however, there is still forecast capacity to support c.13,637 sqm net additional comparison goods floorspace by 2027, increasing to c.21,563 sqm net by 2031.
- 7.63 The above forecasts are established on the basis that SFT (particularly online spending) will grow in line with Experian's current expectations. There is no certainty over this and emerging retail trends certainly point to an increased uptake in alternative modes of shopping which are less reliant on bricks and mortar stores.
- 7.64 Furthermore, in constrained places like Cambridge, we would expect retailers to maximise the use of the Internet or otherwise, generate new innovations in order to suppress demand for additional floorspace. There is therefore a reasonable likelihood of a higher take up of alternative forms of shopping, than perhaps in other parts of the Country.
- 7.65 In order to understand the consequences of this on capacity, we have also tested a scenario which increases the proportion of spend on SFT from 16% to 20% over the period 2022-2031. The outputs of this exercise are demonstrated in Table 7.4 below.

**Table 7.4: Scenario Testing of GLOBAL Comparison Capacity Forecasts (sqm net)**

	2017	2022	2027	2031
Baseline Capacity	<b>3,820</b>	<b>14,141</b>	<b>31,226</b>	<b>39,976</b>
Capacity with Wider Development	<b>-2,855</b>	<b>-1,832</b>	<b>13,637</b>	<b>21,563</b>
Capacity with Wider Development and Increased SFT at 2022	<b>-2,855</b>	<b>-10,077</b>	<b>4,579</b>	<b>12,444</b>

Source: Table 14, Appendix 3

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## Summary

- It is evident from our analysis that the out-of-centre foodstores in the City are the dominant foodstores in the City, attracting a 41% market share from within the 'core area' (Zones 1-4) compared to the city centre stores which attract just 6%. The district centres are also performing a key role in the 'core area' with a market share of 22%.
- According to the survey results, certain stores appear to be overtrading (e.g. Sainsbury's, Coldhams Lane) whilst others are trading below company average (e.g. Asda, Beehive Centre). Having regard to our qualitative analysis, we consider that all stores are likely to be trading well and there is no overwhelming evidence of substantial overtrading. In order to balance out the over/under-trading of particular stores, we have forecast capacity on a global basis.
- On the basis of current market shares and forecast growth in population and expenditure, we have identified no capacity to support additional convenience floorspace in the City over the plan period. This is largely as a result of existing commitments including the extension to the Sainsbury's, Coldhams Lane, the Co-op at the Station development and new convenience stores coming forward in areas of major housing growth which will absorb all available capacity and create a notional oversupply of convenience floorspace for the duration of the plan period.
- Cambridge city centre is clearly the most dominant comparison shopping destination in the survey area, attracting an overall market share of 57%. Whilst this represents a marginal decline in market share (5%) since 2008, the centre is clearly still performing well.
- The concentration of retail warehousing to the east of the city centre is also performing well with a strong sales density in excess of £5,000 per sqm and an overall market share of 24% which, in contrast to the city centre, represents an increase since 2008. In total, we estimate the city centre and out-of-centre retail provision together retains c.80% of expenditure generated within the survey area which is a strong level of retention and clearly reflects Cambridge's prominence as a sub-regional retail destination.
- Based on the current market share of the city centre and out-of-centre retail provision, and after taking into account existing commitments for additional comparison goods floorspace, our analysis identifies baseline capacity to support 3,820 sqm net

additional comparison floorspace at 2017, increasing to 14,141 sqm net by 2022, to 31,226 sqm net by 2027 and to 39,976 sqm net by 2031.

- However, to some extent capacity identified in the short-medium term could be met by major planned developments coming forward in the wider area which are likely to influence shopping patterns in the wider area and claw back expenditure from Cambridge. Over the longer term however, we still identify capacity to support c.13,637 sqm net additional comparison goods floorspace by 2027, increasing to c.21,563 sqm net by 2031.
- Assuming a greater level of growth in SFT, particularly online spending, in addition to factoring in developments in the wider area, indicates that this would further reduce capacity to support additional comparison goods over the longer term to c.4,579 sqm net at 2027 and c.12,444 by 2031.



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## 8. Commercial Leisure Assessment

- 8.1 Drawing on our qualitative assessment of the health and performance of existing centres and leisure destinations in the City, the household survey and our knowledge of commercial leisure market trends, this section presents our analysis in respect of the capacity for additional leisure floorspace over the plan period to 2031. This captures a wide range of commercial leisure occupiers, including cinemas, bowling alleys, bingo, snooker halls, nightclubs, health and fitness centres and food and beverage providers in the shape of restaurants, pubs, bars and cafés and cultural facilities including theatres, concert halls, museums and art galleries.
- 8.2 There is no robust methodology for forecasting floorspace capacity for specific forms of leisure development. In any event, new leisure formats are continually evolving, fuelled by external factors, and where they fall within the D2 use class are able to switch between different types without the need for planning permission, just as pubs can switch to restaurant or retail uses without the need for planning. However, in order to provide an indication of capacity for additional commercial leisure facilities, we have examined current and forecast growth in overall leisure expenditure and a number of specific sub-sectors and projected potential floorspace growth in relation to existing leisure floorspace and national trends.

### Commercial Leisure Patterns

- 8.3 We have assessed the main leisure destinations within the City, notably Cambridge city centre, by reviewing leisure patterns arising from the household survey. In analysing data from the household survey, we have acknowledged that there is a built-in bias towards female respondents and over 35 year olds and the limited responses by under 35s and students. Whilst the main respondent was asked about the behaviour of other members of the household, it is however, fair to say that the survey does not give us a clear and full insight into the patterns and behaviour of younger adults.
- 8.4 In terms of the key messages from the household survey:

- Eating out is the most popular leisure activity undertaken by 76% of surveyed Cambridge area residents. This is followed by visiting the cinema (66%), concerts (54%), museums and art galleries (53.5%), the theatre (50%).
- Drinking out in pubs is also popular with (46%) of respondents stating that they or members of their household undertake this leisure activity, together with health and fitness (31%), ten pin bowling (29%), children's indoor play (14%) and nightclubs (10%). Participation rates in snooker (4%) and bingo (3%) are low. It is possible that the over 35 age group bias of main respondents may have under-estimated participation in those leisure activities that tend to have a young adult bias.
- Cambridge Historic Centre stands out as the main location for leisure; 51% of respondents visit the centre most often for daytime or evening eating out, and 41% for evening drinking.
- The majority of all respondents (68.4%) do not consider that there is any lack of leisure facilities within a reasonable distance of their home. Lack of access to an ice rink was considered an issue for 6.4% of all respondents within the catchment. Lack of access to a swimming pool was an issue for 5.3% of all respondents and this was felt most by respondents from Zone 7 (west of Cambridge). Lack of access to a cinema was considered an issue for just 2.4% of all respondents, almost all of whom came from Zone 6 (Royston).

## Leisure Market Overview & Floorspace Projections

- 8.5 As highlighted in Table 8.1 below, the average annual expenditure per head on leisure activities within the Cambridge survey area is currently £1,856 per person (at 2010 prices)<sup>4</sup>. This exceeds the national average of £1,761. With assumed annual average growth rates in leisure spending of between 1.6% to 1.8% in real terms between 2012 and 2031, this local leisure spend is forecast to grow to an average £2,556 per head by the end of the plan period in 2031.

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<sup>4</sup> Derived from Experian Micromarketer, October 2012.

**Table 8.1: Survey Area per Capita Leisure Expenditure (2010 Prices) (£)**

	2012	2017	2022	2027	2031
<b>Total Leisure</b>	<b>1,856</b>	<b>2,009</b>	<b>2,196</b>	<b>2,389</b>	<b>2,556</b>
Food and Drink	1,090	1,180	1,290	1,404	1,502
Games of Chance	99	107	117	128	137
Personal Grooming	87	94	103	112	120
Accommodation Services	136	148	161	175	188
Recreational and Sporting Services	143	155	170	185	197
Cultural Services	299	323	353	384	411

Source: Tables 2, 4, 6, 8, 10, 12 & 14, Appendix 4 NB: Figures may not tally due to rounding.

- 8.6 Based on forecast growth in the baseline population across the survey area, Table 8.2 below sets out the anticipated growth in expenditure in leisure as a whole. Based on these population projections, leisure expenditure for the whole survey/catchment area is forecast to grow from £557.2m in 2012 to £875.9m by 2031.

**Table 8.2: Survey Area Leisure Expenditure Forecast (£000s)**

	2012	2017	2022	2027	2031
<b>Total Leisure</b>	<b>557,242</b>	<b>630,337</b>	<b>717,943</b>	<b>813,241</b>	<b>875,905</b>
Food and Drink	327,411	370,231	421,553	477,469	514,251
Games of Chance	29,801	33,728	38,436	43,546	46,904
Personal Grooming	26,181	29,637	33,778	38,268	41,218
Accommodation Services	41,083	46,492	52,978	60,006	64,629
Recreational and Sporting Services	43,123	48,803	55,608	62,999	67,855
Cultural Services	89,705	101,516	115,671	131,046	141,148

Source: Tables 3, 5, 7, 9, 11, 13 & 15 Appendix 4 NB: Figures do not tally due to variations across Zones

- 8.7 Current leisure floorspace provision in Cambridge city centre (Historic Core and Fitzroy/Burleigh Street area) is 43,623 sqm. The household survey reveals that 68% of local residents do not perceive there to be any lack of leisure provision locally, so with some

possible noted exceptions there does not appear to be a particular floorspace under provision relative to leisure expenditure. The household survey also indicates that Cambridge city centre, and the Historic Core in particular, is the most visited location for leisure activity.

- 8.8 Therefore, in simple terms, if one were to assume that the existing supply of leisure floorspace in Cambridge city centre were in broad balance with leisure expenditure from within the catchment area, then we would expect the demand for new leisure floorspace, within the city centre, to grow in proportion to the forecast growth in leisure spending. On the basis of this assumption, Table 8.3 demonstrates that leisure floorspace requirement within the city centre would grow from an existing 43,623 sqm in 2012, to 68,569 sqm by 2031.

**Table 8.3: Cambridge City Centre Total All Leisure Floorspace Forecast (sqm)**

	Total Leisure	2012	2017	2022	2027	2031
A	Without efficiency gain	43,623	49,345	56,203	63,664	68,569
B	With efficiency gain	43,623	44,832	51,063	58,136	63,764

Source: GVA

- 8.9 Although, clearly, not all leisure expenditure from the catchment is currently spent within the city centre, the assumption is that the city centre's current market share has created a need for the current amount of leisure floorspace. Therefore, if the city centre's market share remains the same during the plan period, and there is no reason to assume that it will not, then the projected leisure floorspace requirement for the city centre in row A of Table 8.3 could also hold true. Nevertheless, these all leisure projected floorspace figures should be viewed very much as a hypothetical upper limit rather than as a target to be achieved during the plan period.
- 8.10 In particular, it could be argued that the city centre floorspace provision is not currently running to capacity and/or that operators will seek efficiencies to absorb some of this increase in spending without needing to increase floorspace provision. However, we think that there is potential to improve the efficiency of leisure floorspace use in this way as discussed in detail for each use below.
- 8.11 There is no research based estimate for such efficiency gains for leisure uses. Therefore at this stage we have applied the same efficiency gains as that applied to comparison retail

floorspace (as the closest comparable) to the projected leisure floorspace requirements in Table 8.3. This gives what may be considered a more realistic estimate (row B) of a projected 20,141 sq m increase leisure floorspace requirement between 2012 and 2031.

## City Centre Eating, Drinking and Nightclubs

### Sector Market Trends

- 8.12 The challenges brought about by the recession have created a highly competitive and diverse restaurant market, with consumers eating out less frequently and looking for greater value from diminishing disposable incomes. This has resulted in significant investment from the major operators, with new concepts launched and existing concepts revitalised to entice customers through the doors.
- 8.13 The competitive environment has led to new trading formats, including quick-service restaurants, where customers pay when ordering their food and collect their meal from the point of production. Among the more successful exponents of this format are Nando's and Gourmet Burger Kitchen. Fast-casual restaurants are those with a limited-service or self-service format, offering food prepared to order with fresh ingredients, set in an upscale environment. This is the only segment of the restaurant market that is seeing sustained growth in the economic recession, and is helped by the success of operators such as Wagamama and Le Pain Quotidien.
- 8.14 For many lower and middle income families, the increase in food prices and VAT has made eating out a more expensive luxury. Take-away operators such as Domino's have therefore prospered, and almost half of Pizza Hut's estate now comprises takeaway units.
- 8.15 Recent trading updates paint a rosy picture of the restaurant sector. However while like-for-like comparables sound encouraging, in real terms, because of VAT rises and inflation, trade has actually slipped back from 2009 levels. The few success stories have been the better managed pub operators, such as Greene King and Marston's, who have improved their food offer and started to gain share in the eating out market.
- 8.16 Whilst the decline of the pub sector has been a long and gradual trend, the significant decline in pub supply appears to have accelerated over the last five to ten years.

- 8.17 The British Beer and Pubs Association (BBPA) estimate that there were 55,000 pubs in Britain in 2010, compared to around 59,000 in 2004. In 2009 alone, more than 2,350 pubs closed, equating to a record high of 52 closures a week in the first half of the year (and 45 per week over the full year).
- 8.18 Although the number of closures fell slightly in 2010 (1,300 in total), potentially indicating some initial signs of an easing of the market, the overall downward trend has continued with pubs closing at an average rate of 16 per week in the second half of 2011. It is now estimated that there are 52,000 pubs and bars across the UK.
- 8.19 Whilst much of the recent decline can be attributed to the current recession placing significant strain on consumer's disposable income, there have been a number of other factors over recent years which have combined to create increasingly difficult trading conditions, thus forcing a growing number of licensees out of the market.
- 8.20 One of these has been the change to local communities over time. Historically, the pub was typically at the heart of the local community, however, changing consumer lifestyles have meant that many pubs no longer form the same focal point for local communities – largely due to a much more transient population, with residents often having much more widely dispersed social networks.
- 8.21 In addition, an increasing proportion of young adults never visit pubs. This could partly be attributed to rising national youth unemployment, partly to the increase in home-entertainment, and partly to a growing young ethnic minority population base. This will have some implications for the industry in terms of the propensity for these young adults to regularly visit pubs due to falling disposable income, alternative distractions and religious beliefs.
- 8.22 The higher and increasing level of taxation on beer continues to have a major impact on the profitability of pub businesses in the UK. Since 2004, it is estimated that beer duty has risen by 52% whilst sales in pubs have fallen by around 25%. In 2011 alone, in addition to the 2.5% increase in VAT, beer duty rose by 7.2% (a minimum 2% above inflation rise), whilst at the same time, pub beer sales reportedly fell by a further 3.4%.
- 8.23 Although pubs are permitted to pass these costs onto consumers, it is becomingly increasingly difficult to inflate prices sufficiently to fully cover taxation costs, in view of the

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- reduced disposable income and spend on leisure activities amongst consumers and key target age and socio-economic groups due to the recession.
- 8.24 In the face of these challenges and falling 'wet revenues', pubs are increasingly relying on food sales to try and drive business and improve profitability. This is a tactical shift for many operators as, despite reduced consumer spend and a heavy reliance on price discounting, overall the eating out market (especially casual dining such as pub-restaurants) has remained one of the most resilient sectors compared to other leisure activities, particularly the British pub market.
- 8.25 We have examined trends in the public house sector in more detail in our recently published report 'Cambridge Public House Study' September 2012.
- 8.26 Nightclubs have had a particularly tough time since the introduction of the smoking ban and licensing reforms which have enabled extended pub and bar opening times. The increase in the number of later licences has had a huge impact on nightclub operators who have had to reduce entry fees to attract customers who are less willing to pay to enter a nightclub when they can remain in a pub or bar for free.
- 8.27 Britain's biggest nightclub operator, Luminar, fell into administration in October 2011 due to high levels of debt and a number of unprofitable sites. The company, which operates 66 nightclubs predominately under the Envy, Oceana and Liquid brands, was rescued from its debts of around £85m in December and is currently in the process of rationalising its estate. This will involve a number of sale and leaseback deals to release cash.
- 8.28 Luminar's troubles follow on from other recent high profile casualties in the sector, including Summit Clubs, CanDu Entertainment, Herald Inns and Bars (operators of Brannigans) and Future 3000. The sector continues to struggle against declining consumer spending, off-trade alcohol prices and, most recently, the unprecedented pressures born out of a significant rise in youth unemployment. Smart housekeeping will be important in surviving the current market downturn, as rising utility costs, higher wages and food inflation will see the cost base for nightclub operator's rise sharply. Service charges are also a big issue for nightclub operators as these can often be as much as the rent payable.
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## Local Café, Restaurant, Pub, Bar and Nightclub Use

- 8.29 Eating out is the most popular leisure activity for the catchment population; 76.1% of all respondents take part in this form of leisure.
- 8.30 Cambridge City Centre stands out as the main location serving the leisure needs of the catchment population; 51.3% of all respondents visited the Historic Core for daytime eating out purposes, with an additional 4.6% visiting Fitzroy/Burleigh Street area and a further 10.7% visiting both. Therefore, in total, 66.6% of all main respondents most visit Cambridge city centre for daytime eating out. Nowhere else comes close.
- 8.31 Royston is the next most popular visited by 3.6% of all respondents. This location was particularly popular with residents in Zone 6 (Royston) where 25.8% use it as their favoured location for daytime eating out, although 32.3% of these residents still prefer to visit the Historic Core.
- 8.32 Cambridge also stands out as the main preferred location for eating out in the evening with 51.5% of all respondents stating that the Historic Core is the location they visit most, with 1.8% choosing the Fitzroy/Burleigh area and a further 7.7% choosing both; 61% in total visiting the city centre taken as a whole the most.
- 8.33 Again, Royston emerges as the next most popular location with 6% of all respondents stating this as the location most visited with the town actually being more popular than Cambridge historic centre among residents within Zone 6 (Royston) for whom 41.5% cite Royston as the location they visit most often compared to only 23.1% citing Cambridge.
- 8.34 Survey responses also reveal the relative strength of Cambridge Leisure Park (6.7%) and Mill Road West (6.4%) among other members of the household – likely to be older children and young adults.
- 8.35 Of the total catchment population, 46.3% of all respondents or members of their households participate in drinking out in pubs and bars (note the survey has a bias towards female respondents and largely excludes young adults, so the actual proportion of the catchment population participating in this form of leisure may be higher).
- 8.36 Cambridge City Centre stands out as the main location serving the leisure needs of the catchment population for evening drinking; 41.1% of all respondents visited Cambridge Historic Core most often for drinking in the evening; 0.5% the Fitzroy/Burleigh Street area



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and a further 7.5% visiting both, making 49.1% visiting the city centre as a whole most often for drinking.

- 8.37 Only 9.9% of all main respondents or members of their household's visit nightclubs, but again, this may be in reflection of the 35+ age bias in the sample, so the actual proportion of the catchment population participating in this form of leisure may be higher.
- 8.38 The sample of main respondents who said they visited nightclubs is rather small and so should be treated with caution, however, it suggests that the Fez Club, Revolution Bar, Lola Lo's and Ballare Nightclub are most popular among main respondents, who in turn cited Lola Lo's as particular popular with 'other' members of their households (perhaps younger adults).

### Existing Café, Restaurant, Pub, Bar and Nightclub Provision

- 8.39 As the sub-regional centre for Cambridge and the surrounding towns the city centre has a strong and healthy café, restaurant, pub and nightclub offer. This offer can be divided as follows.
- 8.40 The main restaurant quarter is located along Bridge Street, Magdalene St and the Quayside, with most of the casual dining brands represented (Carluccio, Prezzo, Pizza Express, ASK, Wildwood, Iguanas, Cote Brasserie, and Café Rouge, Strada), together with some independent casual dining (Galleria Restaurant, Crème du Café) and a number of ethnic restaurants (Shabu-Shabu, Teri-Aki, Topkapi);
- 8.41 There is central evening drinking and entertainment area centred on a number of nightclubs (Lola Los, Fez Club, Ballare, The Place), late bars/venues (Baroosh, Revolution, Vaults) and pubs (Bath Arms, Eagle) in and around the Market Place, including the Corn Exchange Street, Bene't Street, Hobson Street, and Trinity Street.
- 8.42 During the day, the Market Place is vibrant with a mix of local shoppers and tourists. The market itself largely caters to the tourist market and hosts two small cafes. Generally there is a surprising lack of café's around the market itself – possibly due to rental levels, with just two independent Italian themed restaurant-cafes; Don Pasquale and Stazione. Nevertheless, just around the corner on Kings Parade - another street popular with tourists - there are a number of cafés overlooking Kings College. These cafes, and the street environment, would benefit from the removal of parked cars and occasional traffic to

- allow the cafes to put more tables and chairs out on either the pavement or the street (this could be on weekends only if access is necessary for servicing the shops).
- 8.43 A secondary eating and drinking area along Regent Street and St Andrews Street with a mix of branded chains (All Bar One, Wetherspoons) and long-standing independents (Varsity Restaurant, Charlie Chans). There is another secondary drinking area of pubs along Kings Street, famous for the 'King Street Run' annual pub crawl. Sadly, the number of pubs along the street has declined over the years and just the King Street Run, Champion of the Thames and St Radegund remain.
- 8.44 Key coffee house brands such as Starbucks and Café Nero are mixed in with the shops along the pedestrianised Fitzroy Street between Christ's Pieces and the Grafton Centre. The Grafton itself has a Café Carrington and a Costa on the ground floor and an upper floor food court with a Bella Italia, Burger King, 'Traditional Favourites' (pasties and pies), BHS Café and a Lavazza - Caffè Italiano, together with a Vue 6-screen multiplex. On Burleigh Street there are a number of independent cafes, a noodle bar, and a sushi bar. These would benefit from the provision of more outside space for tables and chairs – but there is already limited space for pedestrians and bike parking. There is also a cluster of take-aways, restaurants, pubs and bars along East Road on the other side of the Grafton Centre.
- 8.45 Outside the town centre and further along this road which becomes Hills Road, there are a number of pubs and bars, which given the proximity to the main office quarter of Cambridge, benefit from lunchtime and after-work office worker trade. Further still along Hills Road and across the railway there is Cambridge Leisure Park with a Cineworld multiplex and the Junction pub/concert venue.
- 8.46 The main area for take-aways and cheaper ethnic restaurants, many providing directly for the local ethnic population, is located just outside the city centre along Mill Road. Either side of Mill Road lies a cluster of community real pubs and gastro-pubs providing a city wide destination as well as local facility.
- 8.47 Overall, the city centre and surrounding area appears well served for daytime and evening eating and drinking. Retaining this vibrant mix of cafés, restaurants, pubs, bars, and nightclubs is important for the future prosperity of the city centre as a shopping and tourist destination, and for the wider city as a higher education and entrepreneurial

business destination. Planning policy and other regulatory regimes will therefore need to protect these uses and allow them to prosper during the plan period.

8.48 Table 8.4 sets out the main nightclub/late-night venue provision in the City. It should be noted that capacity has become an issue for operators of these types of facilities because licensed capacity is now determined by their fire risk assessment. Capacity therefore depends on the number of fire exits and the activities being undertaken.

**Table 8.4: Main Nightclub/Late-night Venue Provision Existing in Cambridge City**

Venue	Street	Capacity
Nightclubs		
The Place	22 Sydney Street	525
Ballare	Heidelberg Gardens, Lion Yard	746
Lola Lo	1-6 Corn Exchange Street	530
Fez Club	Market Passage	340
Performance Venues		
The Junction	Clifton Road	1,050
The Jam House (former Gala Bingo Hall)	21 Hobson Street	500
Late night pubs/ bars		
Hidden Rooms Basement Building	7A Jesus Lane	200
The Vaults (Bar & Restaurant)	14 Trinity Street	
The Fountain Inn	12 Regent Street	270
The Q Club	1 Station Road	120
Revolution Bar	3-8 Downing Street	499
University Venues		
Cambridge University Social Club	Mill Lane	300
Anglia Ruskin SU Bar*	Ruskin Building	325
Kudos & the Academy*	Helmore Building, Anglia Ruskin Uni	400

Source: GVA/Cambridge City Council \* Licence only allows activity on Thursdays - Sunday nights

### Forecast Café, Restaurant, Pub, Bar and Nightclub Provision

8.49 The average annual spend per person in restaurants, cafes, bars, and pubs within the survey area is currently £1,090 (2010 prices). This represents 59% of all leisure spending. Assuming the same growth rates as for all leisure this spending is forecast to grow to an

average £1,502 per head (at 2010 prices) by the end of the plan period in 2031 (see Table 8.5 below).

**Table 8.5: Per Capita Expenditure in Restaurants, Bars, etc (2010 Prices)**

	2012	2017	2022	2027	2031
Survey Area	1,090	1,180	1,290	1,404	1,502

Source: Table 4, Appendix 4

8.50 Based on the baseline population growth forecasts, Table 8.6 below sets out the anticipated growth in expenditure in cafes, restaurants and bars for the whole catchment area which is forecast to grow from £327.4m in 2012 to £514.2m by 2031.

**Table 8.6: Per Capita Expenditure in Restaurants, Bars, etc (2010 Prices) (£000s)**

	2012	2017	2022	2027	2031
Survey Area	327,411	370,231	421,553	477,469	514,251

Source: Table 4, Appendix 4

8.51 Current floorspace provision for cafes, restaurants, clubs, bars and pubs in Cambridge city centre (Historic Core and Fitzroy/Burleigh Street area) is 27,340 sqm. The household survey reveals, not surprisingly, that the city centre comes out as the main centre in Cambridge for daytime and evening eating and drinking. A total of 66% of residents visit the city centre most often for daytime eating out, 61% visit the city centre most often for evening eating out, 49% visit the city centre most often for evening drinking.

8.52 Therefore, as with all leisure, if one were to assume that the existing supply of cafe, restaurant, club, bar and pub floorspace in Cambridge city centre were in broad balance with catchment expenditure in such venues, then we would expect the demand for new floorspace, within the city centre, to grow in proportion to the forecast growth in spending. On this basis, Table 8.7 row A demonstrates that floorspace requirement for cafes, restaurants, clubs, pubs and bars could grow within the city centre from an existing 27,340 sqm in 2012, to up to 42,942 sqm by 2031.

**Table 8.7: City Centre Café, Restaurant and Bar Floorspace Forecasts (sqm)**

		2012	2017	2022	2027	2031
A	Without efficiency gain	27,340	30,916	35,201	39,870	42,942
B	With efficiency gain	27,340	28,088	31,982	36,409	39,932

Source: GVA

- 8.53 However, the projected floorspace figures in Table 8.7 row A should again be viewed as a hypothetical upper level rather than a target floorspace figure to be achieved during the plan period. City centre leisure floorspace provision is dominated by cafes, restaurants, pubs, and bars, most of which appear from our fieldwork to be used at/or near to capacity at respective peak times on a Friday and Saturday night. Although, operators maybe able to absorb some of the expenditure growth by spreading bookings and attendance earlier/later at night and to other days of the week, the prevailing Monday to Friday working week ensures the continued popularity of Friday and Saturday nights out, while fire regulations, service and customer comfort and expectation all conspire to constrain the operators attempts to improve the efficiency of leisure premises.
- 8.54 Nonetheless, with the introduction of new formats such as quick-service restaurants and chameleon bars (café to restaurant to bar to late venue) we consider than the sector will continue to innovate to create more income per square metre of floorspace and will have to do so in order to compete with comparison retailers for the restricted supply of floorspace within the historic city centre. Moreover, it is unlikely that Cambridge nightclubs have fully escaped the national pressures on the nightclub sector. Given the observed Friday and Saturday night capacity at bars and restaurants in the city there will clearly be demand for additional floorspace of some magnitude for these uses in the city centre as the population and prosperity of the area continues to grow. Row B of table 8.7 identifies a projected 12,592 sq m increase in the projected level of city centre café, restaurant and bar floorspace between 2012 and 2031 even after applying the same efficiency savings as applied to all types of leisure.
- 8.55 As highlighted in Table 8.8 below, our search of EGi, Focus and our own databases suggests that there is strong demand from branded food, drink and nightclub operators for floorspace in Cambridge.

**Table 8.8: Branded F&B Operators Looking for Space in Cambridge**

Leisure Type	Brand Operator	
<b>Restaurants</b>	après ASK Barburrito Busaba Eathai Byron Café Piccolo Café Rouge Cosmo Restaurants Fire & Stone Frankie & Benny's Hickory's Smokehouse	Papa Johns Piccolino Pizza Hut (296 sqm) Pizza Express Real Eat Company Rocket Salt House Tapas Taco Bell Tuttons Wok & Go Zizzi
<b>Cafes</b>	Caffe Nero Ditsch Love Coffee	Mr Pretzels Starbucks
<b>Take Aways</b>	Domino's Pizza KFC	Krispy Kreme Doughnuts McDonalds
<b>Pubs/Pub-restaurants</b>	Great Traditional Pubs Hungry Horse Marston's Inns and Taverns	Slug & Lettuce Brewdog
<b>Nightclubs/Venues</b>	AMG – Academy Music Group Cruise Nightclub Eclectic Bars (Po Na Na, Sakura, Lola Lo)	

Source: EGI/Focus/GVA

- 8.56 These requirements include a number of brands already present in Cambridge, notably on Bridge Street, so they may feel that the local market is strong enough to justify a second site, either in a different city centre location (for example St Andrew's Street, or the Grafton Centre (depending on market) or at a Retail/Leisure Park.
- 8.57 This evidence suggests that there is clear demand and a need for additional A3, A4, A5 and 'sui generis' nightclub floorspace in the city centre and surrounding area and a need to retain existing floorspace within that mix of those uses. Given national market trends in the sector it is likely that the strongest demand will be for restaurant uses, or hybrid 'chameleon' bars that provide a mix of café, restaurant, bar and nightclub space with each use expanding and contracting at different times of the day to suit demand.

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## Cultural (Cinemas, Theatres, Concerts, Museums)

### Cultural Sector Trends

- 8.58 The Cultural Industries sector was the subject of significant growth during the 1990s and early 2000s. In a number of cities such as Brighton, Bristol and Nottingham, civic authorities have encouraged the growth of vibrant mix of media and games studios, art & craft workshops, music production, film and theatre, as the basis for city centre and city fringe regeneration strategies.
- 8.59 Cambridge Horizons produced 'An Arts and Culture Strategy for the Cambridge Sub-Region' in 2006. This sort to make recommendations to build on the area's existing cultural offer in response to projected household growth of 47,500 households in the then Cambridge and Peterborough Structure Plan. This strategy identified the potential for a large purpose built auditorium (concert hall or mixed concert/arena/conference venue) subject to further investigation and funding. The strategy also recommended a number of smaller initiatives to support new communities and the growth of arts in the sub-region.
- 8.60 With recession, cuts in public sector spending on the arts combined with reductions in consumer disposable income have had some affect on the sector, reducing the potential for non-commercial or less commercial cultural developments in theatre, concert halls and museums. During this time, the West End and central London in general has remained strong as a theatre, cinema, concert and museum destination. London clearly has international appeal as a theatre centre and the relative ease with which Cambridge residents can travel to London makes it a significant competitor especially for theatre, museums and concerts.
- 8.61 With the exception of cinema, most cultural leisure requires some form of public subsidy. Some concert halls are able to be run on a commercial basis, especially if combined with conferencing and sporting arena events, however, even then they will normally require a capital subsidy. With current cutbacks in public spending, it is less likely that such subsidies will be available unless procured through developer contributions/CIL, and/or the dual use of University funded facilities.

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## Commercial Cinema Trends

- 8.62 Market trends, therefore, in the cultural sector are led by the cinema sector which is the main form of commercial leisure in this sub-sector. Indeed, multiplex cinemas still have the potential to form an important anchor for new leisure or retail-leisure parks or larger shopping centres. Dominant cinema operators are Odeon and Cineworld although since the consolidation of the industry in 2005, Vue has undertaken an aggressive building programme to try and increase their market share. These providers operate large multiplex cinemas with normally between 8 and 16 screens and 1250 to over 3500 seats.
- 8.63 The cinema industry is not immune from the recession and there were some 18 site closures during 2011, however, this has been more than balanced by the opening of 40 new cinema sites. Overall, the number of cinema sites has increased from a low of 644 in 2002 to 745 in 2011 with purpose-built multiplexes accounting for the majority of this growth. The total number of cinema screens has increased from 2758 in 1999 to 3767 in 2011, multiplex screens increasing as a proportion of total screen provision from 58.9% to 75.2% (all figures from the bfi Statistical Yearbook 2012).
- 8.64 The current economic downturn has hit advertising revenues but in general the industry is considered to be in good health. Although ticket prices have been rising, a night at the cinema is considered to represent a relatively cheap night out, especially for families. Admissions therefore have grown slightly and remained fairly steady during the recession from a low of 156.6 million in 2005 to 173.5 million in 2009, and 171.6 million in 2011. Fluctuations during the last few years have been as much to do with the quality and popularity of film output as with the performance of the economy.
- 8.65 Over the last couple of years, cinema operators have made considerable efforts to improve customer yields by introducing changes such as premium seating areas and enhancing the range of refreshments such as alcohol and higher quality food.
- 8.66 Despite closures, the art-house/community cinema sector continues to be active. HMV recently opened a three screen art-house format above its Wimbledon music store. Another new entrant to the boutique cinema market is Soda. The group operate a small cinema at Bermondsey Square and currently developing a second site at Hackney.
- 8.67 Outside, as well as inside, London, the Picturehouse format of the City Screen group has built an estate of 20 art-house cinemas in cities across England and Scotland, particularly



in university cities such as Oxford, Cambridge, London, Brighton and York. In Brighton, Picturehouse is adding two new screens with a restaurant and comedy theatre to the existing town centre Komedia comedy club venue to compliment it's existing less central one screen Duke of York's cinema. Picturehouse was recently bought by Cineworld in late 2012 however the new owners do not envisage any changes to the current Picturehouse format as it will operate as a separate entity to Cineworld following the merger.

### Local Cinema & Cultural Use

- 8.68 Cinema is the second most popular leisure activity (after eating out) among all respondents; 66.2% cited this as an activity they or their household took part in.
- 8.69 Most respondents in the catchment area use the three main cinemas in Cambridge; Cineworld at Cambridge Leisure Park (37%), Arts Picturehouse on Andrews Street (37%), and Vue Cinema in the Grafton Centre (23%). The Cineworld at Tower Field Leisure Park in Huntingdon is well used by respondents in Zones 7 and 8 (rural areas north west of Cambridge).
- 8.70 Visiting the theatre (49.6%), going to concerts (54.3%), and visiting museums and art galleries (53.5%) are all popular cultural leisure pursuits for the catchment population. Although, with the possible exception of some concerts, these cultural activities may be less commercial and in some cases require public subsidy, they are an important part of the commercial leisure economy in bringing people out to cafes, pubs, restaurants and even shops. They are also important in attracting the students, tourists, employers and employees that underpin the higher education, tourism and high tech economic base of the city.
- 8.71 Cambridge Arts Centre (61.1%), the Corn Exchange (10.9%) and ADC Theatre (8.9%) are the most visited theatres in Cambridge among all main respondents and other members of the household. Although competition from London West End shows itself in being the most visited for 12.9% of main respondents and 18.8% of other members of the household. The Mumford Theatre at Anglia Ruskin University is also well visited by other household members (9.5%).
- 8.72 Cambridge Corn Exchange (58.3%), West Road Concert Hall (15%), and the Junction (7.5%) are the most visited concert venues for main respondents. Interestingly, 5.4% cite

London West End as the place they visit most. The Junction increases in perceived popularity for other members of the household (22.7%), along with Kings and Trinity College Chapels.

- 8.73 The Fitzwilliam Museum is the most visited by all main respondents (80%) with Central London being the next most visited (5.3%). Respondents felt that other members of their households also visited Kettles Yard Museum, the University Museum of Archaeology, and of Zoology most frequently.

### Existing Cinema & Cultural Provision

- 8.74 There are two main multiplex cinemas in Cambridge: the 9 screen Cineworld at Cambridge Leisure Park on Hills Road to the south of the city centre and the 8 screen Vue cinema within the Grafton centre. City Screen also operate a 3 screen Picturehouse cinema above the Wetherspoons on St Andrew's Street within the city centre. These three cinemas absorb 87% of cinema visits by main respondents to the household survey.

**Table 8.9: Cinemas in the Cambridge Catchment Area**

Venue	Street	No. Screens
Arts Picturehouse	38 - 39 St Andrews Street	3
Cineworld	22-26 Cambridge Leisure Park, Clifton Way	9
Vue Cinema	105 Grafton Centre, Fitzroy Street	8
Sawston Cinema @ Marven Centre	New Road	1

Source: GVA

- 8.75 In addition there is a small community cinema within the survey area run by school children in Sawston. Other than that there is some 'leakage' outside the survey area to the Cineworld at Huntingdon from the survey areas to the north west of Cambridge.

**Table 8.10: Theatres in Cambridge**

Venue	Street	No. Seats
Cambridge Arts Theatre	6-7 St Edwards Passage	670
Cambridge University ADC Theatre	Park Street	300
Mumford Theatre,	Anglia Ruskin University, East Road	250

Venue	Street	No. Seats
The Shed	Clifton Way	220
Cambridge Drama Centre	Anglia Ruskin University Covent Garden (just off Mill Road)	115

Source: GVA

- 8.76 Cambridge Arts Centre, the Corn Exchange, and ADC Theatre, are the main theatres in Cambridge. These three theatres are most visited by 81% of main respondents. The Mumford Theatre at Anglia Ruskin University is also well visited by other household members. There is a small but significant leakage of 13% of main respondents to London West End.

**Table 8.11: Main Concert Venues in Cambridge**

Venue	Street	Capacity
Cambridge Corn Exchange	Wheeler Street	1849
West Road Concert Hall	11 West Road	499
The Junction	Clifton Way	220
Trinity College Chapel	Trinity College	400
Kings College Chapel		

Source: GVA

- 8.77 Cambridge Corn Exchange, West Road Concert Hall, and the Junction are the main concert venues in Cambridge. These are the main venues visited by 81% of main respondents. The Junction increases in perceived popularity for other members of the household along with Kings and Trinity College Chapels.
- 8.78 In addition to these main venues, there are a large number of other smaller live music venues through the dual use of churches (St Bene't's, Great St Marys), university and school halls, pubs and nightclubs (Vaults, Q's, The Alma, Portland Arms, Man on the Moon, the Emperor, and many more).

**Table 8.12: Museums in Cambridge**

Venue	Location
Cambridge and County Folk Museum	Castle Street
Cambridge Museum of Technology	The Old Pumping Station, Cheddars Lane
Fitzwilliam Museum	Trumpington Street
Kettles Yard Museum and Gallery	Castle Street
Scott Polar Research Institute	Lensfield Road
Sedgwick Museum of Earth Sciences	Downing Street
University Museum of Archaeology and Anthropology	Downing Street
University Museum of Classical Archaeology	Sidgwick Avenue
University Museum of Zoology	Downing Street
Whipple Museum of the History of Science	Free School Lane

Source: GVA

8.79 With the combined resources of the Universities, Cambridge has an extensive provision of museums including several which are globally renowned – the Sedgwick Museum of Earth Sciences, The Whipple Museum of the History of Science, the Museum of Archaeology and Anthropology, the Museum of Zoology and the Scott Polar Institute. The Cultural Strategy suggests that this is a strength that the city can exploit.

8.80 The city also has a healthy provision of Art Galleries as illustrated by Table 8.13 below.

**Table 8.13: Art Galleries in Cambridge**

Venue	Location
Kettle's Yard,	Castle Street,
Clare Hall Gallery	Herchel Road
Williams Art	5 Dale's Brewery, Gwydir Street
The Ruskin Gallery at Cambridge School of Art	Anglia Ruskin University, East Road
The New Hall Art Collection	Murray Edwards College, Huntingdon Road,

Source: GVA

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## Projected Cinema Need

- 8.81 Existing cinema provision in Cambridge would appear to meet the needs of the existing population in quantitative and qualitative terms. Lack of cinema facilities was only an issue for 2.4% of main respondents in the household survey, although this did rise to 16% among those living in Zone 6 (Royston).
- 8.82 The standard way to gauge the level of cinema provision is by screen density (i.e. the number of screens per head of population). According to the British Film Institute annual statistical yearbook for 2012 there were 6.1 cinema screens per 100,000 in the UK in 2011. Therefore, with a current population of 301,254 the survey area would require 18.4 cinema screens to match the national average provision. With a forecast population of 393,253 the survey area would require 24 screens to meet the national average. This would suggest that the existing provision of 22 screens is sufficient to address the current and future needs of the Cambridge area catchment during the plan period.

## Gaming (Betting Offices, Bingo, Casinos)

### Bingo Trends

- 8.83 The bingo sector has been through a significant period of restructuring. Following a period of decline in the 1980s and 1990s, major operators such as Mecca and Gala, sought larger buildings of between 2,000 to 3,000 sqm, capable of seating larger numbers of people and therefore allowing for greater and more substantial prizes in an effort to attract custom, with concomitant savings through economies of scale. Although this did lead to the closure of smaller venues it was successful in reviving the fortunes of the sector. Viewed traditionally as an activity for the elderly, the industry attracted a growing number of younger participants as operators started to focus on capturing the next generation of players by offering themed events.
- 8.84 However, with the growth in online and mobile bingo the property based bingo sector is facing a major new threat to its fortunes. Operators such as Gala Bingo have responded to this threat by seeking to attract customers by offering to match deposits that new gamers make when signing up to online accounts. Nonetheless, according to the UK Gambling Commission, 3.4% of UK adults participated in club based bingo in the 12

months to June 2011. This compares with the 6.9% GB participation rate reported by Mintel in 2004.

- 8.85 This has led to the widespread closure of bingo clubs. A 2011 report by Ernst & Young (E&Y) for the Bingo Association showed that in 2005 the UK had 678 bingo clubs, but by 2010 the number had fallen to 526. The report suggests that even more clubs are now closer to the 1,000 visits per week “tipping point” and further declines in admissions could result in them closing. E&Y forecasts estimate that club numbers are likely to continue to decline into the future, with a total decline of 19% in club numbers from 526 in 2010 to 427 in 2014.
- 8.86 To this can be added the latest June 2012 Mintel report which forecasts a continued decline in participation with the value of the sector expected to decline from an £940m in 2006/07 to £552m by 2016/17 as highlighted in Table 8.14 below.

**Table 8.14: Consumer Expenditure in Bingo Clubs (2006/07 – 2016/17)**

	Total (£m)	Index	% change	£m at 2011 prices	Index	% change
2006/07	940	141	na	1,194	195	Na
2007/08	719	108	-14.4	1,006	164	-15.7
2008/09	715	107	-0.6	843	138	-16.2
2009/10	634	95	-11.3	731	120	-13.2
2010/11	674	101	6.3	661	108	-9.6
2011/12 (est)	668	100	-0.9	612	100	-7.4
2012/13 (fore)	633	95	-5.3	573	94	-6.4
2013/14 (fore)	610	91	-3.5	522	85	-8.9
2014/15 (fore)	579	87	-5.1	445	73	-14.7
2015/16 (fore)	551	83	-4.8	343	56	-22.9
2016/17 (fore)	522	78	-5.3	241	39	-29.8

Source: Casinos and Bingo Market, Mintel (June 2012)

## Casino Trends

- 8.87 Consumer expenditure in casinos has made an early recovery from the recession in comparison to other gaming sectors, such as bingo. Casino admissions have increased by

25% over the period 2006/07 to 2010/11 and are expected to increase further during 2011/12 and 2012/13 thanks to the opening of the UK's first new casinos licensed under the 2005 Gambling Act. This growth has been driven by investment by existing providers in the improvement of their facilities to cope with an increase in competition arising from the Act. This has led to increased admissions and greater spending on improved non-gaming activities, such as eating and drinking, and a positive response to investment in facilities.

### Betting Offices

- 8.88 Betting offices have also suffered in the face of regulation making it difficult to make betting offices more hospitable and able to attract a wider range of age, social and gender groups and on-line gaming. Nevertheless, the sector remains strong enough to compete for retail services space (A2) in secondary areas.

### Existing Gaming Provision

- 8.89 There is no Bingo provision currently available in Cambridge. There used to be a Gala Bingo Hall located in the former Central Cinema on Hobson Street where it had operated since 1972. However, this building closed and has permission to be turned into 'Jam House' a new bar-restaurant and live music venue.
- 8.90 There are no Casinos in Cambridge. Under the 1968 Act, the Government controls which local authorities can issue a casino premises licence. In 2008, the government proposed 8 new small casino licences and 8 new medium sized licences. Cambridge was not included in the list of 16 locations able to grant a new licence.
- 8.91 Experian Goad identifies a total of 269 sqm of 'bingo & amusement' floorspace and 604 sqm of 'casino and betting office' floorspace in Cambridge city centre (Historic Core and Fitzroy/Burleigh areas). It follows from the above that this must be amusement and betting office floorspace only.

### Current and Projected Gaming Need

- 8.92 There is no existing bingo or casino provision in Cambridge to meet the needs of the existing population. Only 2.7% of respondents to the household survey stated that they or

members of their household ever take part in Bingo. Lack of bingo or casino facilities was not raised as significant issue in the household survey.

- 8.93 Average annual spend on 'Games of Chance' (Bingo, Casino, Betting Shops) in 2012 is currently £99 per head within the Cambridge catchment survey area. This represents 5% of all spending on leisure per person in the survey area. Assuming the same growth rates as for all leisure this spending is forecast to grow to an average £137 per by the end of the plan period in 2031.

**Table 8.15: Per Capita Expenditure on Games of Chance (2010 Prices)**

	2012	2017	2022	2027	2031
Survey Area	99	107	117	128	137

Source: Table 6, Appendix 4

- 8.94 Based on the baseline population growth forecasts, Table 8.16 below sets out the anticipated growth in expenditure on games of chance which is forecast to grow from £29.8m in 2012 to £46.9m by 2031 for the household survey area.

**Table 8.16: Forecast Expenditure on Games of Chance (2010 Prices) (£000s)**

	2012	2017	2022	2027	2031
Survey Area	29,801	33,728	38,436	43,546	46,904

Source: Table 7, Appendix 4

- 8.95 Current floorspace provision for betting shops and amusement services in the city centre is 873 sqm. Theoretically, the demand for this floorspace could grow to 1,374 sqm in Cambridge city centre (Historic Core and Fitzroy/Burleigh area) by 2031 based on the assumptions above or to 1,278 sqm if we apply the same efficiency gains as we have to comparison retail. However, given the growth in online gaming and home entertainment we do not believe that market demand for gaming floorspace will reach anything approaching either figure. Indeed, it is more likely that the existing floorspace may be displaced by stronger demand for other retail and leisure uses and displaced to secondary shopping areas closer to residential areas outside the defined central shopping area.
- 8.96 Outside the central area it is conceivable that if the bingo industry can reverse it's fortunes in the face of online competition, for example by offering a more attractive social, food,



drink and entertainment offer than online, then there could be future demand for a large modern bingo hall as part of a leisure park (e.g. expansion of Cambridge Leisure Park) or as part of the D2 leisure element of any proposed major new Town or District shopping centre, however, at present, national trends and local household survey figures are not promising.

## Snooker

### Market Trends

- 8.97 Nationally, demand for snooker and pool has been falling. According to Sport England's Active People Survey for 2010/11 only 0.28% of the adult population played snooker once a month, compared to 0.4% in 2006/07. Equivalent participation rates for pool also showed a fall from 0.24% to 0.13%. As with a number of leisure pursuits, snooker halls have suffered from the combined effects of smoking ban, rising price of alcohol, the recession and the growth of alternative home entertainment.
- 8.98 This downward trend in participation has led to the closure of many commercial snooker/pool halls across the country, or to their conversion into club nights offering pool as an additional facility. Riley's' former chain of 159 clubs entered administration in 2009 and was purchased by Valiant Sports Ltd, resulting the immediate closure of 30 of the clubs. With subsequent closures included the Riley's chain now numbers 115 clubs.

### Local Use and Provision for Snooker

- 8.99 Very few people play snooker; only 4% of all main respondents or members their households play snooker or pool (again this could be an under-estimate of youth or casual participation in pubs by non-respondents). The sample is rather small and should be treated with caution, but main snooker venues emerge as Cambridge Snooker Centre on Coldhams Road (30.9%), WT's Snooker and Sporting Club, on Burleigh St (26.6%) and Mickey Flynns on Mill Road (13.7%).

**Table 8.17 Existing Snooker and Pool Halls in Cambridge**

Venue	Street
Cambridge Snooker Centre	8 Coldhams Road
Mickey Flynns American Pool	103 Mill Road

Venue	Street
W T's Snooker and Sporting Club	39B Burleigh Street

Source: GVA

- 8.100 There are currently three snooker and pool hall venues in the city which serve the sub-regional catchment area. As a potential sign of the current stress in the snooker market a planning application to convert Mickey Flynn's American Pool hall into a supermarket has been submitted and refused, although the owners have not chosen to convert the hall to any other D2 use as they are able to do without permission under the use classes order.

### Projected Need

- 8.101 Given the decline facing the industry we do not project any additional need for snooker halls, certainly not during the first half of the plan period. However, as with many other leisure formats, it is conceivable that later in the plan period someone may evolve a more mixed leisure format that is able to address the long term decline and attract groups of people back into snooker halls.

## Ten Pin Bowling

### Market Trends

- 8.102 Ten-pin bowling was introduced to the UK in the 1960s and instantly became popular, with over 200 bowling alleys in use by the early 1990s. However, interest and investment in the game has suffered in recent years. According to Mintel, the ten-pin bowling market declined in value by 17% between 2006 and 2011 from £271 million to an estimated £225 million in 2011. They forecast effectively no material growth to an estimated £226 million in 2016 (see Table 8.18 below).

**Table 8.18 The UK Tenpin Bowling Market (2006-16)**

	Total (\$m)	Index	£m at 2011 prices	Index
2006	271	120	337	150
2007	278	124	335	149
2008	267	119	308	137
2009	248	110	272	121

	Total (\$m)	Index	£m at 2011 prices	Index
2010	238	106	249	111
2011 (est)	225	100	225	100
2012 (fore)	217	96	214	95
2013 (fore)	219	97	213	95
2014 (fore)	222	99	212	94
2015 (fore)	223	99	209	93
2016 (fore)	226	100	207	92

Source: Tenpin Bowling Market UK, Mintel (November 2011)

- 8.103 The major operators in the sector are Original Bowling Company who operate 20 AMF Bowling centres and 25 Hollywood Bowl centres, Essenden who operate 32 bowling centres under the Tenpin brand (having closed 5 in February 2012), Bowlplex (18 sites), Garland Leisure (17 sites), American Amusements (10 sites), NAMCO (11 sites), Newbury Leisure ( 8 sites). These all have an average of about 24 lanes per site and tend to be combined with a wider offering of variously; laser quest, children's play, American pool, nightclub, amusements arcade, food and beverage. All have experience a decline in turnover from 2006 to 2010 of mostly more than 20% (see Table 8.19 below) and all have posted pre-tax losses in at least the last two years (some every year).

**Table 8.19 Main Bowling Alley Operators**

Operator	Main Brand	Sites	Turnover 2006-10
The Original Bowling Company Ltd	AMF Bowling, Hollywood Bowl	45	-2.9% (2006-09)
Essenden plc	Tenpin	32	-16%
Bowlplex Ltd	Bowlplex	18	-21% (2007-11)
Garland Leisure Ltd	1st Bowl	17	n/a
NAMCO Operations Europe Ltd	NAMCO Funscape, NAMCO Station	11	-7.8% (2007-10)
American Amusements/ Big Apple Entertainments Ltd	Superbowl, Strikes	10	-22.5% (2007-10)
Newbury Leisure Ltd	Lakeside Superbowl	8	-21.6% (2006-10)
All Star Leisure Group Ltd	All Star Lanes	4	+9.6% (since 2009)
Bloomsbury Leisure Holdings Ltd	Bloomsbury Lanes, The Lanes	2	n/a

Operator	Main Brand	Sites	Turnover 2006-10
Others	Various	169	
<b>Total</b>		<b>321</b>	

Source: Tenpin Bowling Market UK, Mintel (November 2011)

- 8.104 The main ten-pin bowling operators have sought large buildings of between 2,300 to 4,200 sqm on a single floorplate. These larger venues are typically incorporated into mixed-use leisure schemes with plentiful free parking, with the bulk of the customer base comprising families and teenagers.
- 8.105 All Star Lanes have sought to introduce a smaller venue format to the market in certain specific locations. Their four existing sites are concentrated in central London and at Stratford City. They consist of between 4 and 14 alleys and focus heavily on the corporate market (60% of turnover) providing private parties with a good food and beverage offer in a stylish designer environment. The company currently has plans to open in major regional centres at Edinburgh, Leeds, Glasgow, Manchester and Bristol. Bloomsbury Leisure is another smaller format food-led boutique bowling lane operator with two UK sites in London (8 lanes) and Bristol (5 lanes).
- 8.106 The larger venues are now typically incorporated into mixed-use leisure schemes and participation levels vary depending on location, quality of facilities and the food and beverage offer, with the bulk of the customer base comprising families and teenagers.

### Local Ten Pin Use

- 8.107 Ten Pin Bowling remains reasonably popular in Cambridge with 29.2% of all main respondents or members of their households participating in this form of leisure. The most popular location by far, is the Tenpin at Cambridge Leisure Park where is most often frequented by 85.9% of all respondents. Next most popular with 9.5% of all respondents is the Hollywood Bowl in Stevenage all of whom come from Zone 6 (Royston), although half of respondents from this zone still use Tenpin in Cambridge most often.

### Existing Ten Pin Provision

- 8.108 There is one large 28 lane Tenpin bowling centre at Cambridge Leisure Park on Hills Road/Clifton Way. This modern facility is a full family entertainment centre providing a

café, bar and diner, and other leisure activities including 8 pool tables, a Lazer Quest and two function rooms.

**Table 8.20 Existing Ten Pin Bowling Centres in Cambridge**

Venue	Street	Lanes	Other facilities
Tenpin	Cambridge Leisure Park, Clifton Way	28	Café, Bar, Diner, 8 Pool Tables, Laser Quest, 2 Function rooms.

Source: GVA

## Projected Need

- 8.109 Compared to bingo and snooker, ten-pin bowling is a popular activity. Almost a third of respondents (29.2%) to the household survey stated that they or members of their household took part in ten pin bowling. Of those, 85.9% visit the Tenpin at Cambridge Leisure Park most often. There is some leakage from the area, notably the Hollywood Bowl in Stevenage which attracts 50% of bowlers from zone 6 (Royston), although 50% still visit Tenpin at Cambridge.
- 8.110 Given the decline in revenues facing the industry we do not project any additional market need for ten-pin bowling sites during the first half of the plan period. Overall, we consider ten-pin is less affected by the smoking ban and rising alcohol prices that have affected other leisure activities. Therefore, it is likely that demand for ten-pin bowling will recover with economic and population growth, especially among families. There may be demand for a second bowling facility, preferably as part of a wider family leisure offer, during the second half of the plan period, although the large size of the existing Tenpin facility (28 lanes) and lack of leakage from anywhere other than zone 6 suggests that there maybe spare capacity within this facility pushing demand for a second bowling centre towards the end of the plan period.

## Health & Fitness

### Market Trends

- 8.111 The commercial health and fitness club sector has been the scene of many changes during the economic downturn, with a number of high profile transactions and the emergence of budget gym operators.

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- 8.112 Since the start of the recession, in 2008, the fitness industry has grown its total Market Value by 4%, increased the member base by 2% whilst increasing the number of fitness facilities by a further 1.7%. Growth in the industry has been driven by a good performance from public fitness operators and budget gym providers. Public sector gyms saw growth across three key performance indicators: increasing the number of sites open by twenty, a growth in membership numbers of 2% and an impressive growth in Market Value of 5.8%. According to the Leisure Database report 'State of the UK fitness industry 2012' there was a net increase of 14 (87 closures, 101 openings) in the number of private clubs to 3,176 and a 2.2% increase in members. There was a parallel net increase of 16 (46 closures, 62 openings) in the number of public clubs to 2,724. There are now a total of 7 million private and public health club members representing 12% of the population (7.2% private, 5% public).
- 8.113 At the top end of the health and fitness market operators such as David Lloyd, and Virgin Active target the family group and provide a wide range of facilities; gym, studios, pool, racket sports, bar and restaurant. Clubs at this end of the market charge more than £50 per month and draw from a fairly wide 20-30 minute catchment. David Lloyd have in addition always specialised in extensive tennis provision, while many higher end operators are now looking to extend the range and quality of spa and children's activity and equipment provision. Mid market brands such as Cannons, Greens and LA Fitness, sit just below these top-end brands offering a high quality health & fitness offer but with less 'add-ons' for a lower monthly fee. These tend to draw from a slightly smaller 15-20 minute catchment.
- 8.114 The rapid expansion of the sector and increased competition has resulted in widespread rationalisation with more clubs being concentrated in the hands of fewer, larger companies. Factors that have hindered stronger market development in recent years, such as increased competition, market saturation and declining membership fees, are likely to continue to impact the upper end of the market over the next five years. In particular, increased competition has put downward pressure on membership fees and an increased emphasis on secondary revenue generation which has been increasing as a percentage of total turnover in recent years. Consumers increasingly expect more sophisticated facilities and a higher quality of service.
- 8.115 The key driver in the private health & fitness club market at present is the budget gym sector. With consolidation at the higher end of the market new budget gym operators

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such as The Gym Group, Pure Gym, Klick Fitness, Fit4Less, Fitness4Less, Fitspace, Active4Less, Gym4All, Xercise4Less, True Gym, Easy Gym, DW Fitness Express and Lifestyle Fitness have entered the market with a stripped down no frills, easy entry, product costing less than £20 per month. Concentrating on the single person and utilitarian market, convenience is the cornerstone for the budget gym with operators seeking 80% of their business from within 5-8 minutes of the club. Normally, the budget gym operator requires between 3,000 to 3,500 members and it is not uncommon for one adult member of the family to join one of these convenient budget clubs for use on the way to/from work, while retaining a family membership at a high end club for the weekend and evenings. These clubs require between 500 sqm and 2,000 sqm of floorspace (depending on operator).

- 8.116 According to Government figures, more than 27 million adults in England are not getting enough exercise and 14 million do not complete thirty minutes of exercise a week contributing to 9,000 obesity-related premature deaths each year. Increasing awareness of public health and obesity issues, coupled with rising numbers of GP referrals, are likely to provide growth opportunities over the next few years. In particular, the direct relationship between fitness and health is becoming ever more apparent in the market. This has already been evidenced by many of the major operators forming alliances or partnerships with health insurance providers and Nuffield Hospital's acquisition of Cannons and Greens.
- 8.117 Other areas of the sport and fitness sector have seen growth despite economic challenges. Five-a-side football centres are increasing in numbers and the two major operators, Goals and Powerleague, continue to acquire new sites. These modern facilities provide new generation AstroTurf floodlit pitches with on-site parking and a bar. The game is played on smaller pitches and the matches are shorter, allowing operators to maximise revenues. In the past, companies would sponsor a work team, however the ease with which smaller teams can join leagues and manage fixtures has resulted in the 5-a-side game overtaking 11-a-side in terms of participants. Yoga, is also increasing in popularity, either as an offering within the fitness suites and studios of main stream health and fitness clubs or by independent operators providing Yoga classes from their own studios or from community facilities.

### Local Private Health & Fitness Use & Provision

- 8.118 The household survey found that 31% of all main respondents or members of their households participate in health & fitness or leisure centres. Again, the age bias in the

survey (27% were over 65 years old) may have significantly underestimated the catchment level of participation in health, fitness and leisure centre sporting activities.

8.119 Key private health and fitness venues in the catchment to emerge from the survey are David Lloyd, Greens Health & Fitness, DW Fitness, and LA Fitness.

**Table 8.21 Existing Private Health & Fitness Clubs in Cambridge**

Venue	Street	Number of Stations	Other Facilities
Upper End			
David Lloyd (Cambridge)	Units 21-25, Coldhams Business Park	50-80	25 m outdoor, 20 m indoor, 13 tennis courts, 3 squash, 4 court sports hall (half basketball court), multi sports court, gym, bar, suite, function rooms
Middle			
LA Fitness (Cambridge)	Unit 34 Clifton Way	70-100	17 m pool
DW Fitness	Beehive Centre Unit 2a, Cambridge	50-70	20m pool, Gym, sauna, steam room
Greens Health & Fitness Centre	213 Cromwell Road, Cambridge	20-30	20m pool, Sauna, Steam room, gym classes
Livingwell Health Club (Cambridge)	Granta Place	20	12m pool, Sauna, steam room, gym, fitness room
Waves Health and Leisure Club	Menzies Hotel, Bar Hill, Cambridge	20	16 m pool, Sauna, steam room, spa, 2 tennis courts
Spirit Health and Fitness Centre	Holiday Inn, Bridge Road	15	15m pool, Steam room, sauna, classes
Fitness Express at Cambridge Quay Mill Hotel	Church Road	n/a	12 m pool Gymnasium, sauna, steam room, spa
Independents			
The Barn Health and Leisure	Oakington Road	25	
Bourn Golf and Leisure Club	Toft Road, Cambridge	20	15m pool, Golf Course, Restaurant, caravan site, beauty therapy
Trinity Health Club	24 Cambridge Science Park	20	
Frank Lee Centre	Hills Road	15	25 m
Langley's Gym	93 Stretham Road, Ely	10	
Cambridge Squash & Fitness Club	295 Histon Road	n/a	squash



Venue	Street	Number of Stations	Other Facilities
East Wing Romsey Labour Club	Mill Road	n/a	Private Boxing Club
Energie Fitness Club	64-68 Newmarket Road	n/a	

Source: GVA

8.120 We have identified 16 private health and fitness clubs within the Cambridge catchment area. A total of 31% of household respondents stated that they or members of their households visited health and fitness clubs or leisure centres. The most visited private facilities arising from the household survey were Greens (11.7%), David Lloyd (5%), and DW Fitness (3%). As noted, the survey is likely to have under-estimated the leisure patterns of younger adults.

### Projected Private Health & Fitness Club Needs

8.121 The average number of members per club in the UK is currently 1,426. For Independents, the average number is 726, for multiple chain clubs the average is 2,198. The top 10 brands by number of clubs (includes David Lloyd, LA Fitness, and DW Fitness) have an average of 2,897 members, while low cost operators have an average of 3,452 members (all figures from the Leisure Database Company).

8.122 Based on these averages we can estimate that the current supply of private health & fitness clubs in the Cambridge catchment area have capacity for approximately 23,000 members. Based on the UK private health & fitness club market penetration rate of 7.2% of the national population, the currently estimated population of 300,187 people in 2012 should generate 21,613 members. Therefore, the current provision would appear in broad alignment with need.

8.123 However, with a projected growth in population to 341,747 the number of people seeking private club membership would increase to 24,605 by 2031 based on the current market penetration rate. This would create capacity for one or two more clubs. However, Experian are also forecasting a growth in spending on recreational and sporting services from £143 per head in 2012 to £197 per head in 2031. If this increase in spending were applied to the private health & fitness sector and the forecast population increase in the survey area it could create demand for 33,906 private memberships by 2031 assuming that the forecast increase in spending translates into increased market penetration. This would create capacity for four or five more health clubs. Again, as with all industries, the

leisure sector will be seeking efficiency gains during this period in the form of more members and/or in the membership fee per person. Membership numbers and fees have come under particular pressure during the recession. Therefore the actual number of new clubs required is likely to fall somewhere between these two estimates at around three more clubs.

- 8.124 With the majority of provision clustered in the middle to upper end of the market, we would anticipate that most of this increase in future demand will be taken up by budget gym operators. On this basis, we don't consider that there is current requirement for a new health club, but we would project that there will be demand for one new multiple chain private health & fitness club approximately every 6-7 years during the plan period assuming a return to growth in the private health and fitness sector alongside national economic recovery. However, it is likely that the operating formats and average membership numbers will change over this period, which may affect our assumptions.

## Children's Play Centres

### Market Trends

- 8.125 The indoor play market in the UK is still a highly fragmented, fledgling industry. According to Mintel, the indoor children's play market in the UK was estimated to be worth in the region of £135 million (on admissions alone) by the end of 2008, a rise of more than 16% since 2003. Despite this, the number of admissions has remained largely static, and may indicate that admission prices have risen in line with a more sophisticated play offering by operators. The same research identifies that demand for indoor children's play facilities has increased since the turn of the millennium, with a greater proportion of young adults with children viewing play centres as a regular part of their children's education.
- 8.126 There are no figures with regard to how the market has fared in recession, however, GVA have worked with operators who are continuing to expand their offer which would suggest that the market has been robust, which may in part be due to the sequence of poor summer weather over the last few years.
- 8.127 Over the last few years a "new breed" of operators has entered the market, many based on successful models from the USA and Europe. In this context, there has been a significant shift in the location of these types of property and the facilities they offer from basic facilities in industrial type locations to a much more extensive range of facilities in

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retail and leisure park type locations offering significant footfall. The aim of many of the more recent independent operators has been to turn play centres into a wider visitor attraction appealing to a wider age bracket.

- 8.128 Two relatively new companies in this sector have been leading the way in this respect, namely Gambado and Kidspace. The facilities offered by these companies are reasonably extensive and include climbing frames and walls, interactive computer areas, go-karts, trampolines, themed areas for different age groups, bungee jumps etc., together with a restaurant/café and party rooms. The belief is that the environment has to be not only attractive and wide ranging for the child but also relaxing and enjoyable for the parent. Whilst it is too early to determine the success of these models, both companies are looking to continue their expansion. Much of their recent development activity has focused on Greater London and the Home Counties, with a particular focus on areas with a higher proportion of more affluent families. Both Gambado and Kidspace seek 18-20,000 sq ft of floorspace (c.2000 sqm) of at least 14,500 sq ft (c.1500 sqm) should be flexible 6.5 m floor to ceiling and sites of 1-1.25 acres with capacity to provide parking for 100 cars.
- 8.129 Generally, children's indoor play centres cannot afford market rents in major retail shopping areas, and therefore seek the lower rents available in secondary shopping areas. The need for larger floorspace and higher ceiling heights mean that secondary shopping areas only rarely have suitable buildings for this use leaving operators looking for suitable buildings through the change of use of older lower rent former industrial or warehouse buildings, or the change of use of former agricultural barns as part of a wider children's farm attraction. This can cause planning policy issues in relation to the retention of the industrial and agricultural use of buildings.

### Local Childrens Indoor Play Use and Provision

- 8.130 Some 13.8% of respondents or members of their households visit children's indoor play centres. This tends to be higher among the zones outside central Cambridge, perhaps a reflection of a greater proportion of younger families in these zones. The most visited facilities by the catchment population are Funky Fun House, Cheeky Monkeys and Whale of a Time.

**Table 8.22: Existing Children's Indoor Play in the Cambridge area**

Venue	Street	Facilities
Cheeky Monkeys Play Barn	Chaplins Farm, Babraham Road, Cherry Hinton	Indoor Play barn, playhouse, sandpit, golf driving range, farmshop, indoors and outdoors
Whale of a Time	8 Viking Way, Bar Hill, West Cambridge	2 playframes, café, indoors and outdoors
Funky Fun House	8 Mercer Row (north of Newmarket Road)	
Spotted Giraffe	The Grip Industrial Estate, Linton	Play frame and cafe
Creepy Crawlies Play Centre	Royston Leisure Centre	Indoor Soft Play Centre

- 8.131 We have identified three children's indoor play areas in Cambridge. This provision is fairly evenly spread in residential areas to the west, east and south east of Cambridge. In addition, there is a play centre within Royston Leisure Centre and The Spotted Giraffe café and play centre at Linton.
- 8.132 According to the household survey, Funky Fun House is the most visited by 51% of respondents or members of their households, followed by Cheeky Monkeys (21%), Whale of a Time (11%) and the Spotted Giraffe (3%). Together these three account for 86% of visits. Of the remaining 14% that use 'other' children's indoor play, half of these are from zone 6 (Royston) so it assumed that they use Creepy Crawlies in Royston, with the remaining 6-7% leaking to other facilities outside the catchment area.

### Projected Indoor Play Need

- 8.133 There is no national parameter for an amount of children's play floorspace per head from which to predict future requirements. Given the limited leakage from the catchment area, and a fair spread of facilities, there would appear to be little need for additional children's indoor play facilities at present.
- 8.134 However, with the projected growth in population and increasing prosperity with economic recovery, demand for children's play facilities will increase, especially in locations close to family housing. We therefore think that there will be a future need to identify floorspace for this type of use which is not affected by the same forces that have affected other leisure uses such as the smoking ban and increase in alcohol prices, and is less affected by the increase in home entertainment.

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## Summary

- Taking account of forecast growth in leisure expenditure per head, estimated population increases and floorspace efficiency savings it is estimated that there could be a requirement for an additional 20,141 sqm of all leisure (A3, A4, A4, D2, and some D1, A1 and sui generis) floorspace in Cambridge City Centre during the plan period to 2031.
- Eating and drinking out in cafes, restaurants, pubs, bars and nightclubs is the most popular leisure activity for the catchment population accounting for 58% of all leisure expenditure. A significant number of national restaurant, café, pub and nightclub chains are looking for space in Cambridge. It is projected that growth in spending per head and population could generate demand for up to 12,592 sqm of additional floorspace in the city centre for A3, A4, A5 and nightclub (sui generis) uses by 2031.
- Cambridge has a strong cultural industries sector with a variety of community, art-house and multiplex cinemas, several theatres, concert halls and smaller venues and an internationally important cluster's of museums and archives. In terms of commercial provision, the city appears to have adequate cinema provision to address current needs and projected future population growth to 2031.
- The gaming sector has been going through a difficult period. Online gaming, the smoking ban and rising alcohol prices have compounded the long term decline in Bingo Halls. Cambridge does not have a casino licence. Overall, we consider that any increase spending on 'games of chance' in the area will be largely picked up by online providers providing little demand for new floorspace in this sector.
- Nationally, demand for snooker has been in decline in the face of the smoking ban, increasing alcohol prices and the rise of alternative home entertainment. We do not predict any growth in the need for additional floorspace in this sector.
- Ten-pin bowling has also been badly affected by the recession. We do not forecast any need for additional ten-pin bowling floorspace during the first half of the plan period, however, we predict that its fortunes will pick-up with those of the economy. This could lead to potential demand for a second bowling facility as the population and prosperity of the area grows in the second half of the plan period however capacity within the existing 28 lane Tenpin Bowling centre could push this demand towards the very end of the plan period.

- Although there has been consolidation at the upper end of the market the health & fitness sector has continued to grow during the recession driven by the low cost gym sector. We estimate that the current capacity for private health and fitness club memberships matches potential demand in the area. However, as the population and prosperity of the area grows we forecast that there will be demand for an additional multiple chain club every six or seven years. This demand is likely to be taken up by budget gym operators who are not currently present in the local market.
- There is no apparent need for additional children's play facilities at present. However, with the growth in population and prosperity we believe that there will be a need for additional facilities in locations close to family housing areas.

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## 9. Conclusions and Recommendations

- 9.1 This Study has provided an update to the 2008 Sub-Regional Study albeit focusing primarily on Cambridge in order to feed into the City's emerging Local Plan. We have updated and identified any variations in the qualitative and quantitative performance of Cambridge and the network of district and local centres and taken into consideration major planned housing growth and planning commitments as a basis for forecasting future economic needs.
- 9.2 This section summarises our headline conclusions, and sets out our recommended retail and leisure strategy for Cambridge over the forthcoming plan period.

### Current Performance and Forecast Growth

#### Convenience Goods

- 9.3 Based on the results of our analysis, it is evident that Cambridge continues to support a good level of convenience goods provision across its network of centres, supplemented by out of centre foodstores.
- 9.4 Consistent with the findings of the 2008 Study, the City Centre is still largely serving a top-up food shopping role, with the Sainsbury's and M&S on Sidney Street providing the main convenience goods provision in the Historic Core and Little Waitrose the main provision in the Fitzroy/Burleigh Street area. These stores are supplemented by a range of other small scale convenience uses, such as bakers, newsagents, health food stores and delicatessens amongst others.
- 9.5 Our updated analysis identified very little change in the district and local centres which continue to offer at least one convenience store and perform an important localised convenience shopping function. The only exception to this being Newnham Road which has no convenience goods offer. We have also identified scope for new district and local centres to be defined which will contribute towards meeting the food shopping needs in areas of growth both within the existing built up area (e.g. Station area) and the outer lying areas in the north-west and southern fringe.

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- 9.6 Beyond the network of centres, the network of out of centre foodstores (Sainsbury's, Coldhams Lane; Asda and M&S Simply Food, The Beehive; Tesco, Cheddars Lane and Waitrose Trumpington) also play a key role in contributing towards meeting the convenience shopping needs of local residents, particularly for main-food shopping. These stores have a combined market share of 41% within the 'core area' (Zones 1-4). In contrast the district and local centre stores have a combined market share of 22% and the city centre stores a combined market share of 6% across Zones 1-4.
- 9.7 According to the survey results, some of the out-of-centre stores appear to be overtrading (e.g. Sainsbury's, Coldhams Lane) whilst others are trading below company average (e.g. Asda, Beehive Centre). Having regard to our qualitative analysis, we consider that all stores are likely to be trading well and there is no overwhelming evidence of substantial overtrading.
- 9.8 On the basis of current market shares and forecast growth in population and expenditure, we have identified no capacity to support additional convenience floorspace in the City over the plan period to 2013. This is largely as a result of existing commitments including the extension to the Sainsbury's, Coldhams Lane, the Co-op at the Station development and new convenience stores coming forward in areas of major housing growth which will absorb all available capacity. Given the inherent uncertainties in forecasting over such a long period of time, longer term forecasts should be treated with caution and updated at regular intervals during the plan period.

### Comparisons Goods

- 9.9 Cambridge city centre continues to be the most dominant comparison shopping destination in the survey area, reflecting its extensive comparison shopping offer split across the Historic Core and Fitzroy/Burleigh area. Since 2008, the Historic Core has continued to benefit from the opening of the Grand Arcade and the Christ's Lane development which have attracted a number of mid-high end operators. The Fitzroy-Burleigh area continues to perform a complementary role alongside the Historic Core, providing a more mainstream retail offer.
- 9.10 Despite improvements in the centre's comparison retail offer, the updated survey evidence indicates a marginal decline in the city centre's market share (from 62% to 57%). On the basis of current market share (i.e. 57%), and allowing for inflow, we estimate the city centre has an overall comparison goods turnover of £657.3m which equates to a sales



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density of approximately £7,497 per sqm net. Whilst this is a strong performance, particularly in light of current trends, it does also suggest a marginal decline in performance since 2008, consistent with a fall in market share.

- 9.11 Outside the city centre, 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 on offer. However there are also a number of more traditional high street names represented at the Beehive and Cambridge Retail Park (e.g. Boots, Argos, Burton/Evans/Dorothy Perkins) which overlaps to some extent with the city centre's offer.
- 9.12 On the basis of current market shares, we estimate that the combined turnover of the City's out-of-centre retail warehouse provision is £202.5m, equating to a sales density of c.£5,269 per sqm net. This is a strong performance, reflected by a further increase in market share since the 2008 Study (from 15% to 24%).
- 9.13 In total, we estimate the city centre and out-of-centre retail provision together retains c.80% of expenditure generated within the survey area which is a strong level of retention and clearly reflects Cambridge's prominence as a sub-regional retail destination.
- 9.14 Based on the constant market share of the city centre and out-of-centre retail provision (i.e. 80%), and after taking into account existing commitments for additional comparison goods floorspace and developments in the wider sub-region, we identify baseline capacity to support approximately 3,820 sqm net additional comparison floorspace at 2017. By the virtue of growth in the baseline population and available expenditure, we expect this to increase to 14,141 sqm net by 2022, to 31,226 by 2027 and to 29,976 sqm net by 2031.
- 9.15 We would recommend these forecasts are treated as an 'upper limit' reflecting uncertainties over the effect of wider developments on capacity and the level of growth in SFT, particularly online spending.
- 9.16 Whilst we have factored in some degree of trade diversion to other centres in the wider sub-region reflecting planned enhancements in the retail offer in these centres (including a new centre at Northstowe), until these developments come forward, there is a degree of uncertainty as to how much expenditure is likely to be drawn to these destinations. The Council should continue to monitor this closely.

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- 9.17 Furthermore, as highlighted by our scenario testing, a marginally greater level of growth in SFT, particularly online spending, would further reduce long-term capacity to support additional comparison goods to c.4,579 sqm net by 2027 and c.12,444 by 2031. Given the physical constraints in the city centre, there is also potential for retailers to maximise efficiencies which will also have the effect of reducing overall capacity.
- 9.18 Further analysis should also be undertaken to assess the potential trade draw implications of any other proposed new centres in South Cambridgeshire (e.g. Bourn Airfield and Waterbeach) and how this will affect the City's market share and 'need' for additional comparison goods floorspace. It would be entirely legitimate for South Cambridgeshire to plan for such centres to provide a day-to-day comparison offer (alongside a range of other complementary uses) which will serve their immediate catchments (both new and existing communities) and help stem the flow of expenditure into Cambridge city centre. However, we strongly recommend that the City Council is involved in any discussions surrounding proposed new centres and to ensure that the implications are properly assessed.

### Commercial Leisure

- 9.19 We have identified reasonably strong growth in overall leisure expenditure in the region of £318.7m over the period between 2012 and 2031. This could give rise to demand for an additional 20,141 sqm of all leisure floorspace in the city centre by 2031.
- 9.20 Specifically in the café, restaurant, pub, bar and nightclub sector we estimate a growth of £186.8m over the same period leading to demand for an additional 12,592 sqm of A3, A4, A5 and sui generis nightclub floorspace by 2031. We predict a continued growth in demand for cultural industries although it would appear that there are sufficient cinema screens in the area to absorb this demand in the commercial cinema sector. This suggests strong scope for Cambridge city centre to continue to reinforce its overall leisure offering during the plan period.
- 9.21 We predict a continued decline in demand for bingo and snooker, although the recent decline in demand for ten-pin will recover with the economy. It is difficult to determine whether this will create enough demand for an additional ten pin bowling facility before 2031.

9.22 The supply of private health and fitness clubs would currently appear in balance with the needs of the existing population. However, we predict that demand will continue to grow with population and economic growth leading to demand for an additional private health and fitness club, probably from the budget gym sector, every six to seven years. We also believe that the supply of children's play centres is currently in balance, but that additional facilities will be required close to main areas of family housing as the population expands.

## Recommended Strategy

9.23 Assuming that identified new convenience developments come forward as planned, we do not consider there any need to plan for or allocate sites to accommodate further additional convenience goods provision in the City over and above these. Any proposals which come forward for additional convenience goods should be directed towards existing and proposed new centres in the first instance, in line with national policy. Where proposals come forward on an edge of centre site, the Council should ensure that the scale of retail proposed is appropriate to the role and function of the centre.

9.24 Turning to comparison goods, on the basis that there is an element of uncertainty in forecasting over such a long time period and given new developments coming forward in the wider area which will inevitably effect the capacity forecast for the City, we do not consider it feasible for the Council to plan to fully meet the identified capacity up to 2031. Instead we recommend the Council strategy should, in the first instance, focus on planning to meet the capacity identified up to 2022 (i.e. 14,141 sqm net).

9.25 Whilst the Council should plan to meet this level of capacity, it should also be acknowledged that this capacity will be sensitive to developments in the wider area. This will necessitate a reasonable degree of cooperation between the Local Authorities and on-going monitoring to establish the extent to which some of the capacity identified may be met elsewhere.

## Cambridge City Centre

9.26 The results of the household survey indicate that Cambridge city centre is the dominant major centre for comparison retail and leisure services (particularly cafes, restaurants, bars and nightclubs) in the catchment area.

- 9.27 In line with its position in the retail hierarchy, the city centre should be the primary focus to meet the identified capacity for additional comparison retail development up to 2022. The Historic Core is evidently constrained in this respect and is unlikely to be capable of accommodating a substantial level of additional comparison floorspace. However, there may be scope to accommodate some of the identified capacity in the Fitzroy/Burleigh area of the city centre. This would help to reinforce the area's role as an important, every-day shopping destination for the City's residents and address emerging signs of vulnerability.
- 9.28 The Council should investigate this further and assess the feasibility of accommodating some of the identified capacity for additional comparison goods floorspace arising over the period to 2022 in the Fitzroy-Burleigh area. This should be regarded as the first priority in sequential terms. The area's role as a focus for commercial leisure uses should also be supported in relation to any future expansion proposals.
- 9.29 We have identified a strong need for additional café, restaurant, and bar space during the plan period and we consider it will be most appropriate to concentrate this growth in the city centre. Most shopping areas need to improve the proportion of leisure in their city centres to attract customers back to their shopping areas in the face of online competition for comparison goods. Cambridge's Historic Core is ahead of the competition in this respect, but as an international tourist, business and education destination it needs to remain as such.
- 9.30 We therefore recommend that this additional leisure floorspace should be concentrated in the Historic Core, even if it means displacing a proportion of retail space – especially smaller units which may be less attractive to multiple retailers. Where possible these uses should be encouraged in the following areas:

### *The Market Place*

- 9.31 Cambridge is one of the few city centres to hold a daily market and the Market Place is a clear destination and focus for tourists. The area would benefit from a mix of shops, restaurants, bars and cafes surrounding the market place to create a more vibrant daytime and night time destination. We also believe that it would be worth experimenting with a regular monthly or weekly (depending on the season) 'evening market' with tables and chairs and a clear food and drink focus along with live music and entertainers (for example choirs at Christmas, family entertainers in summer).

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### *Kings Parade*

- 9.32 Just around the corner from the Market Place is Kings Parade which is west facing and provides another focus for tourist to dwell with an attractive vista facing Kings College. The parade already has four or five café/restaurants and we believe that it would benefit as a destination from the removal of parked cars, full pedestrianisation (or shared space), to allow cafes and restaurants to put more tables and chairs out on the pavement and/or road where visitors would benefit from the attractive views, mid-day, afternoon and evening sun.

### *Bridge Street/Quayside and St Andrews Street/Regent Street*

- 9.33 It will be important to maintain and reinforce the roll of Bridge Street and the Quayside as one of the main locations for restaurants. It will also be important to build up the role of the St. Andrews/Regent Street/Regent Terrace area as a location for cafes, restaurants, and bars. The street would benefit from a reduction in through traffic and increased pavement width's or shared space to allow cafes and restaurants to place chairs and tables outside in good weather.

### *Outside the City Centre*

- 9.34 Beyond the city centre there is some limited scope to expand the Leisure Park which offers potential to reinforce its role as a focus for larger leisure formats. The development of Hills Road and the Station area as a new business and office hub, along with new residential development also provides the opportunity for further leisure and complementary retail floorspace to be accommodated in the area. In particular, this area would be attractive to budget branded health and fitness operators who would be able to tap into residential, business and rail commuter markets in this location.
- 9.35 There may also be scope for the further intensification of the retail parks in the Newmarket Road area as an existing retail location. However, as an out-of-centre location any proposals seeking to create additional retail floorspace in these areas would clearly still be required to demonstrate compliance with the sequential approach and, where relevant, be supported by an impact assessment.
- 9.36 Beyond this opportunity, the plan should allow for some future large scale leisure development to complement the retail planned within the proposed urban expansions in

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the north west and south Cambridge as and when each scheme comes forward. A modest level of day-to-day comparison goods retail could also be encouraged in these locations in order to satisfy the everyday needs of local residents. Although to some extent this will be market driven.

- 9.37 At this stage, there is no need to plan for additional retail provision in Cambridge East on the basis that this development opportunity is unlikely to come forward during the lifetime of the plan. If however, there is any change in circumstances, the Council will need to assess the likely needs of new communities coming forward in this area to ensure that future needs will be met in full and in the most sustainable manner.
- 9.38 If the Cambridge East proposals do not proceed (or even if they do) then there may be an opportunity to integrate more leisure into changes of use, additions, extensions or a future redevelopment of Newmarket Road Retail Park.
- 9.39 In all cases we would recommend that new commercial leisure floorspace is encouraged alongside new retail, business, public leisure and institutional space where the various use types of use can be mutually supportive.

## Policy Recommendations

- 9.40 In line with national policy the Council should seek to focus town centre uses within the city centre and network of existing and proposed new district and local centres. The Council should adopt a sequential approach to site selection, preferring those locations in the city centre in the first instance. Where there are potential opportunities (e.g. the Fitzroy/Burleigh area), the Council should adopt a pro-active approach in trying to bring these forward.
- 9.41 Within the Historic Core where the physical constraints and competing demands are most severe, the Council's policies will need to be more flexible and adaptable in order to be able to respond appropriately to different circumstances.
- 9.42 Drawing on the outputs of the City Centre Capacity Study, the Council should reconsider the appropriateness of the existing Primary Shopping Frontage and, where necessary, redefine it over those areas which would benefit from remaining principally within higher order retail use (e.g. Grand Arcade, Lions Yard etc). However, some flexibility should also be allowed to enable complementary food and drink uses to come forward where it can

- 
- be demonstrated that retail use is not a suitable or viable option (i.e. units which are constrained or do not meet the requirements of modern retailers).
- 9.43 Outside the defined Primary Shopping Frontage, we would recommend that retail policy is adjusted to give greater scope for some A1 retail frontage to convert to A3 or A4 usage, particularly in the areas attracting large numbers of tourists. This policy will need to be run alongside work with the highways, licensing and police authorities to allow for more pedestrianised areas, outside eating and drinking, and a staggering of late licences to prevent large numbers of people leaving venues at the same time.
- 9.44 It follows that policy is also required to protect all A class uses, rather than simply protecting class A1 uses alone, and to allow for changes of use from A1 to A3-A5 (subject to criteria) to work alongside the Use Classes Order permitted development rights which already allow landlords to change up from A5, to A4, to A3, to A2, to A1.
- 9.45 In view of the stresses and changes within the leisure sector, such as the decline in snooker and bingo and rise in eating out, health & fitness and children's indoor play, saved policies 6/1 and 6/2 could benefit from some updating to retain existing, and encourage new, leisure space.
- 9.46 We also recommend that policy 6/1 should be revised to prevent the specific loss of floorspace currently or most recently in D2 leisure use or as sui generis nightclubs, but allow for the change of use between the two, and, where any such building has less than 450 sqm<sup>5</sup> (after consideration of putting in a mezzanine where floor where ceiling heights allow) to, subject to an application, allow for a change to A3 or A4 uses. Any such permission should be appropriately conditioned to prevent the building from changing in turn to retail and thereby maintaining its use for leisure. The policy will also need to allow for redevelopment of such a site where it retains an equivalent amount of leisure floorspace (after consideration of a mezzanine).
- 9.47 Apart from the reuse of redundant bingo and snooker facilities for smaller budget gyms, children's play centres, art-house or community cinema's and nightclubs or restaurants, many new D2 uses such as modern bingo halls, multiplex cinemas, ten-pin bowling, larger

health and fitness clubs, larger children's play centres and concert halls are very unlikely to be able to find space large enough for their formats within Cambridge city centre or other existing district and local centres in the area.

- 9.48 Where there is demonstrable demand, neither are they likely to have a detrimental impact on the city centre which is more focused on its nightclub, eating and drinking offer. Policy 6/2 (or the supporting text) therefore needs to be revised slightly to encourage larger leisure formats to sequentially appropriate locations with good access to transport and as part of any new proposals for large scale retail/mixed use development at planned growth locations in the city. We would also recommend a policy or text which protects D1 floorspace but allows for conversion to, or dual use as, performance and other cultural D2 space where appropriate.
- 9.49 Given the strength of the city centre, we do not consider there sufficient justification to support a blanket locally-set threshold different to that set out within the NPPF (i.e. 2,500 sqm gross). However, recognising that the role and function of the district and local centres is more reliant on convenience goods shopping and given the limited capacity to support additional convenience goods floorspace over the plan period, there may be justification to adopt a lower threshold specifically for convenience goods.
- 9.50 In order to maintain a degree of control over comparison goods, the Council could adopt a policy which acknowledges that, in normal circumstances, retail development below the NPPF threshold would not normally require an impact assessment but that, subject to the Council's discretion, an assessment may be required in certain circumstances, particularly where there may be concerns over i) cumulative impact; and/or ii) the role/health of nearby centres within the catchment of the proposal. Applicants should be encouraged to engage with the Council at an early stage to establish whether an impact assessment may be required.
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<sup>5</sup> This is the size below which we consider it would be difficult to attract alternative modern D2 user such as health and fitness clubs.

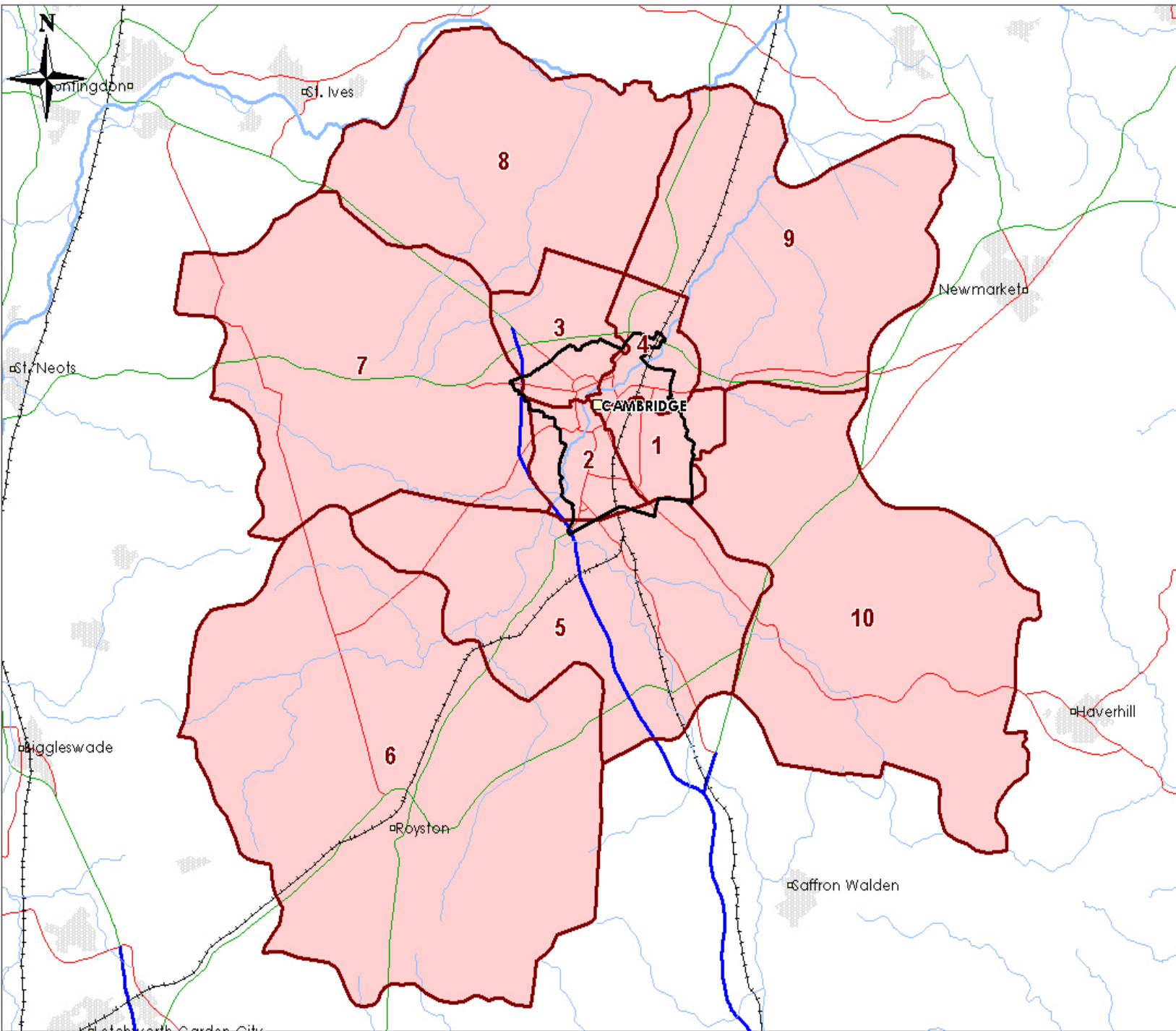




Plans



Plan 1  
Household  
Survey Area



**Cambridge Household Survey Area**

Key

- Study Area & Survey Zones
- District Boundary

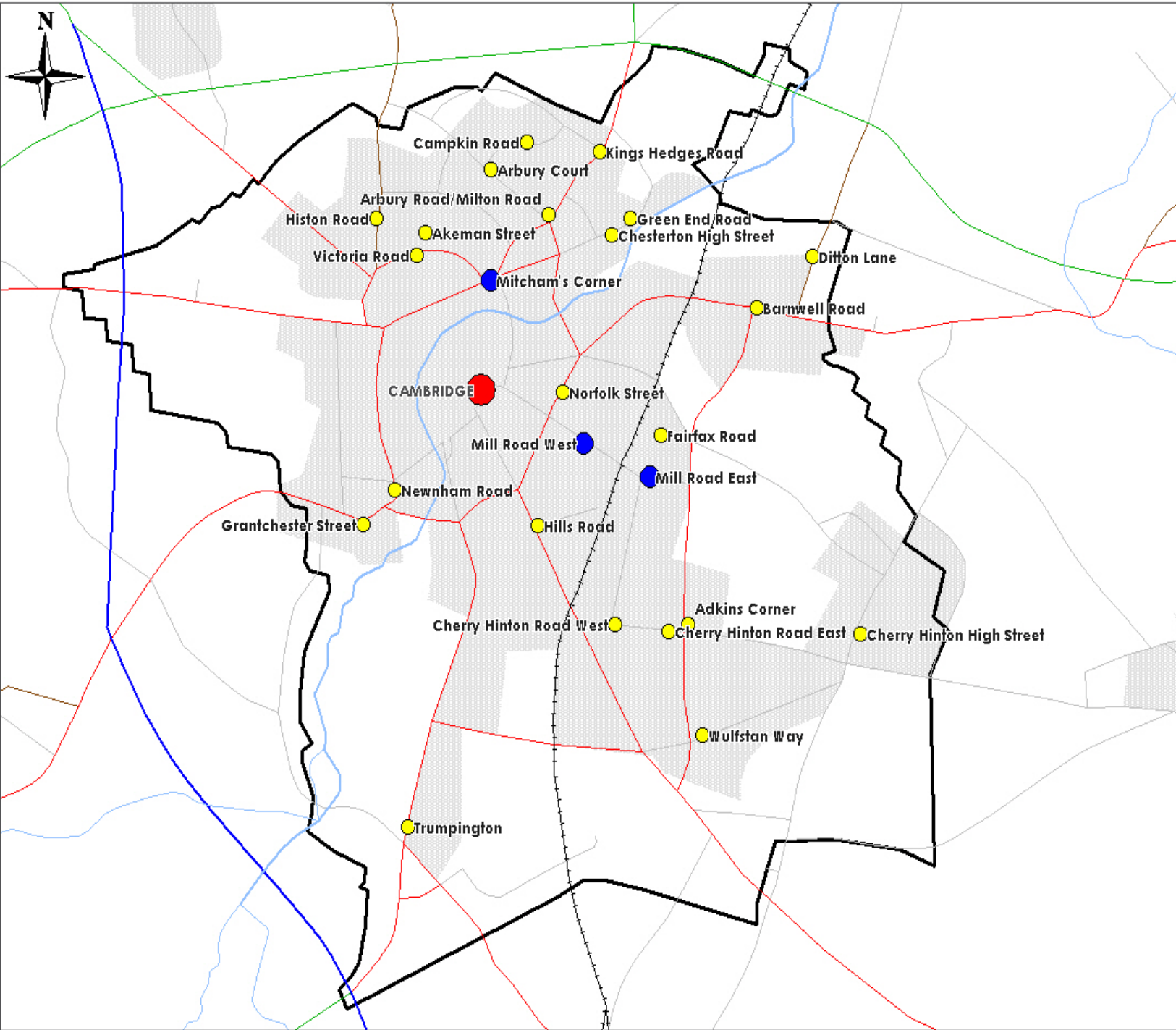
Zone   Postal Sectors

- 1   CB1 1/2/3/7/8/9
- 2   CB2 0/1/3/7/8/9, CB3 9
- 3   CB3 0, CB4 2/3, CB24 9
- 4   CB4 0/1, CB5 8, CB24 6
- 5   CB22 3/4/5/6/7, CB23 1
- 6   SGB 0/5/6/7/8/9
- 7   CB23 2/3/4/5/6/7/8
- 8   CB24 3/4/5/8
- 9   CB25 0/9
- 10   CB21 4/5/6

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Plan 2  
Existing Retail  
Hierarchy



### Cambridge Retail Hierarchy

#### Key

— Cambridge Local Authority Boundary

#### Cambridge Hierarchy

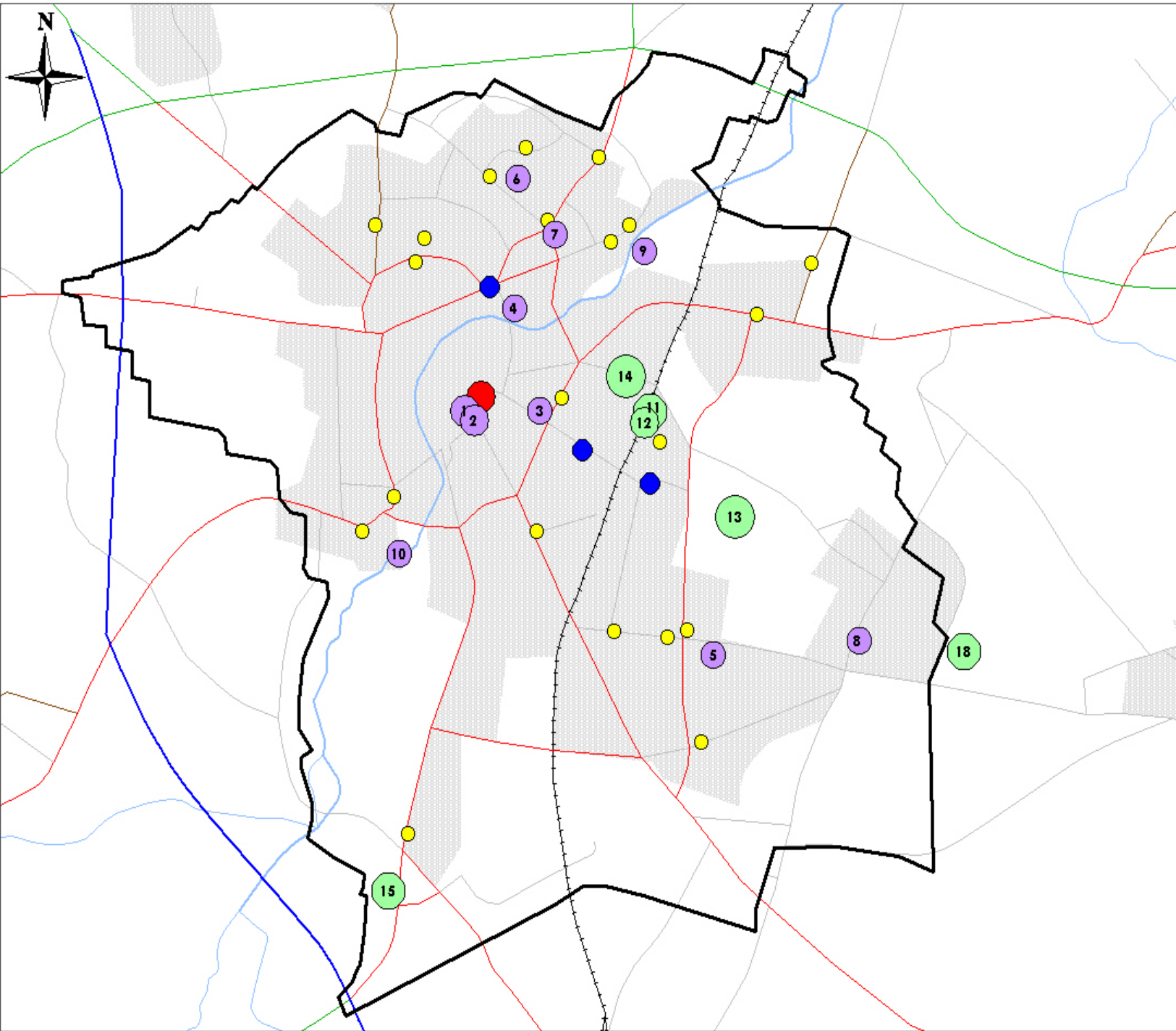
- City Centre
- District Centre
- Local Centre

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Plan 3  
Cambridge  
Foodstore  
Provision





### Existing Foodstores (Cambridge)

#### Key

- Cambridge LA Boundary
- City Centre
- District Centre
- Local Centre

#### Foodstore Locations

- In-Centre
- Out-of-Centre

Size (net floorspace):-

- >4,000 sqm
- 2,000 - 4,000 sqm
- 1,000 - 2,000 sqm
- <1,000 sqm

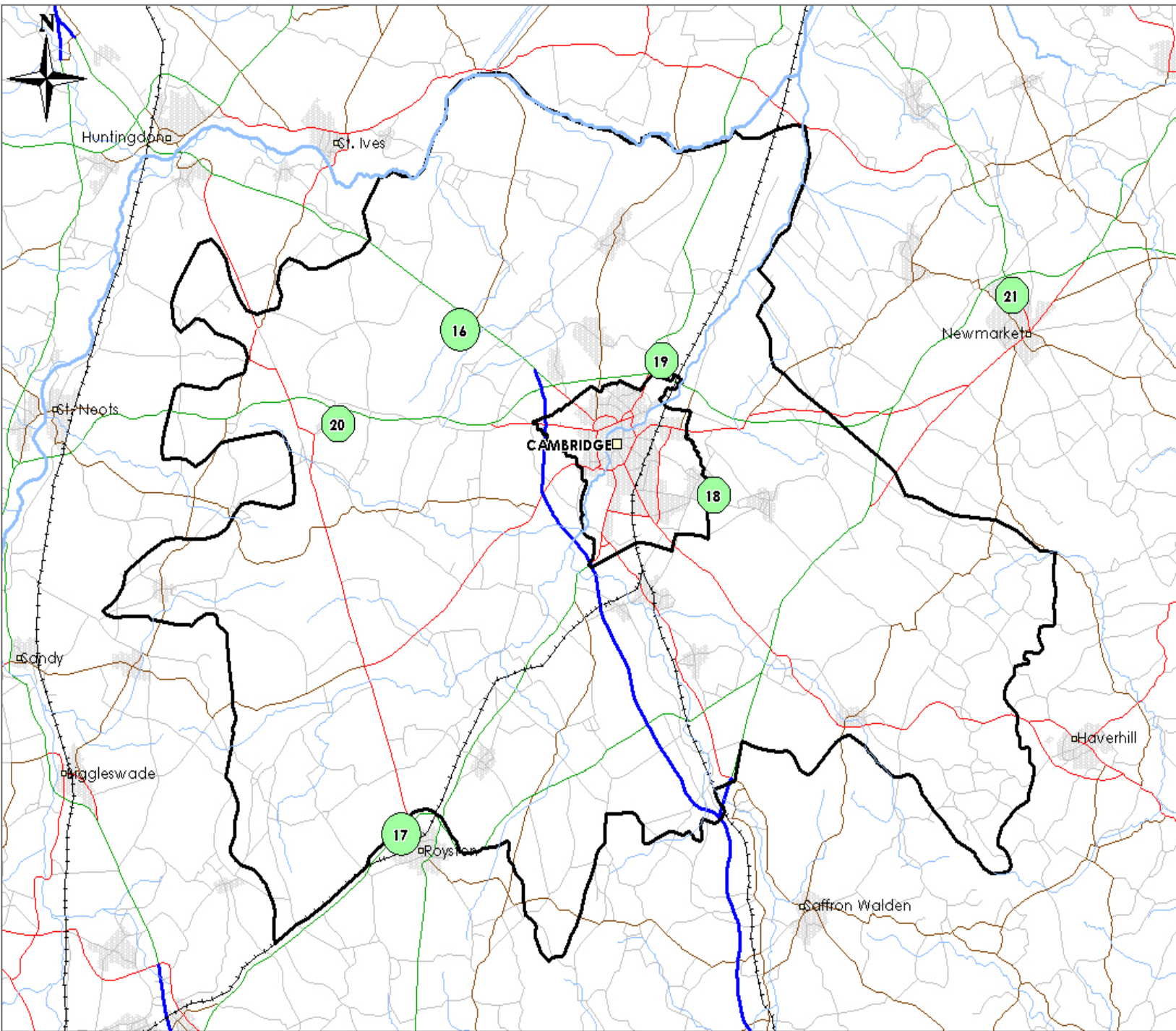
- 1 Sainsbury's, Sidney St
- 2 M&S, Sidney St
- 3 Little Waitrose, Fitzroy St
- 4 Co-op, Chesterton Rd, Mitchams Crn
- 5 Budgen's, Adkins Corner
- 6 Budgen's, Arbury Rd
- 7 Co-op, Milton Rd
- 8 Tesco Express, Cherry Hinton High St
- 9 Tesco, Chesterton High St
- 10 Co-op, Grantchester St
- 11 Asda, Beehive
- 12 M&S, Beehive
- 13 Sainsbury's, Coldhams Lane
- 14 Tesco, Cheddars Lane
- 15 Waitrose, Trumpington
- 16 Tesco Extra, Bar Hill
- 17 Tesco Extra, Royston
- 18 Tesco, Yarrow Rd, Cherry Hinton
- 19 Tesco, Cambridge Rd Ind Est, Milton
- 20 Morrisons, Cambourne
- 21 Tesco, Fordham Rd, Newmarket

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Plan 4  
Foodstore  
Provision beyond  
Cambridge





### Existing Foodstores beyond Cambridge City

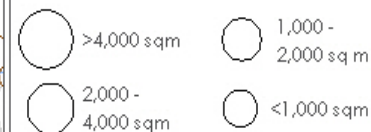
#### Key

— Cambridge Local Authority Boundaries

#### Foodstore Locations

● Out-of-Centre

Size (net floorspace):-

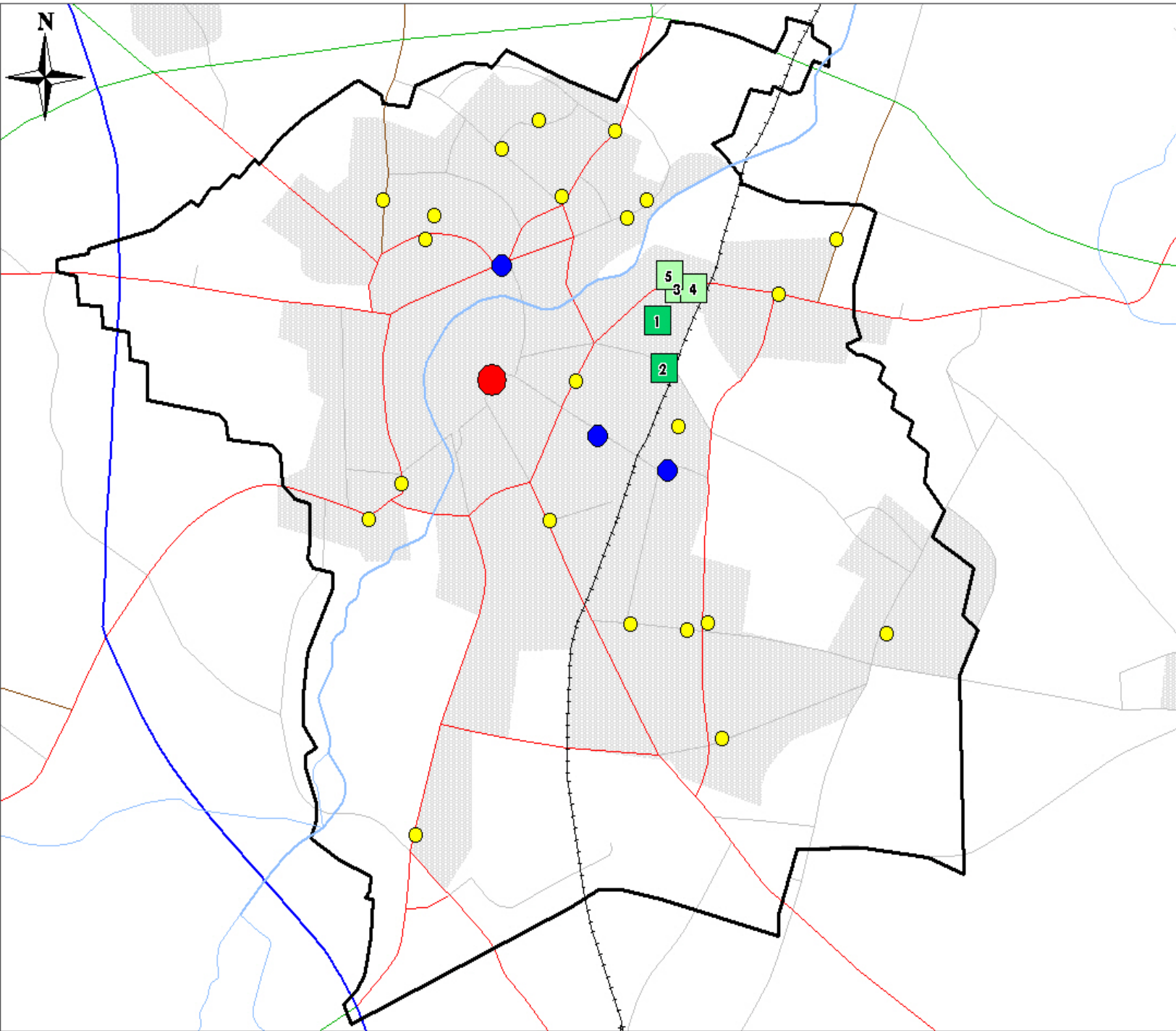


- 16 Tesco Extra, Bar Hill
- 17 Tesco Extra, Royston
- 18 Tesco, Yarrow Rd, Cherry Hinton
- 19 Tesco, Cambridge Rd Ind Est, Milton
- 20 Morrisons, Cambourne
- 21 Tesco, Fordham Rd, Newmarket

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Plan 5  
Cambridge  
Retail  
Warehousing  
Provision



### Cambridge Retail Warehousing

#### Key

— Cambridge Local Authority Boundary

#### Cambridge Hierarchy

● City Centre

● District Centre

● Local Centre

■ Retail Park

1 Cambridge Retail Park

2 Beehive Centre

■ Retail Warehousing Unit

3 B&Q, Newmarket Road

4 DFS, Newmarket Road

5 Staples/Comet, Newmarket Road

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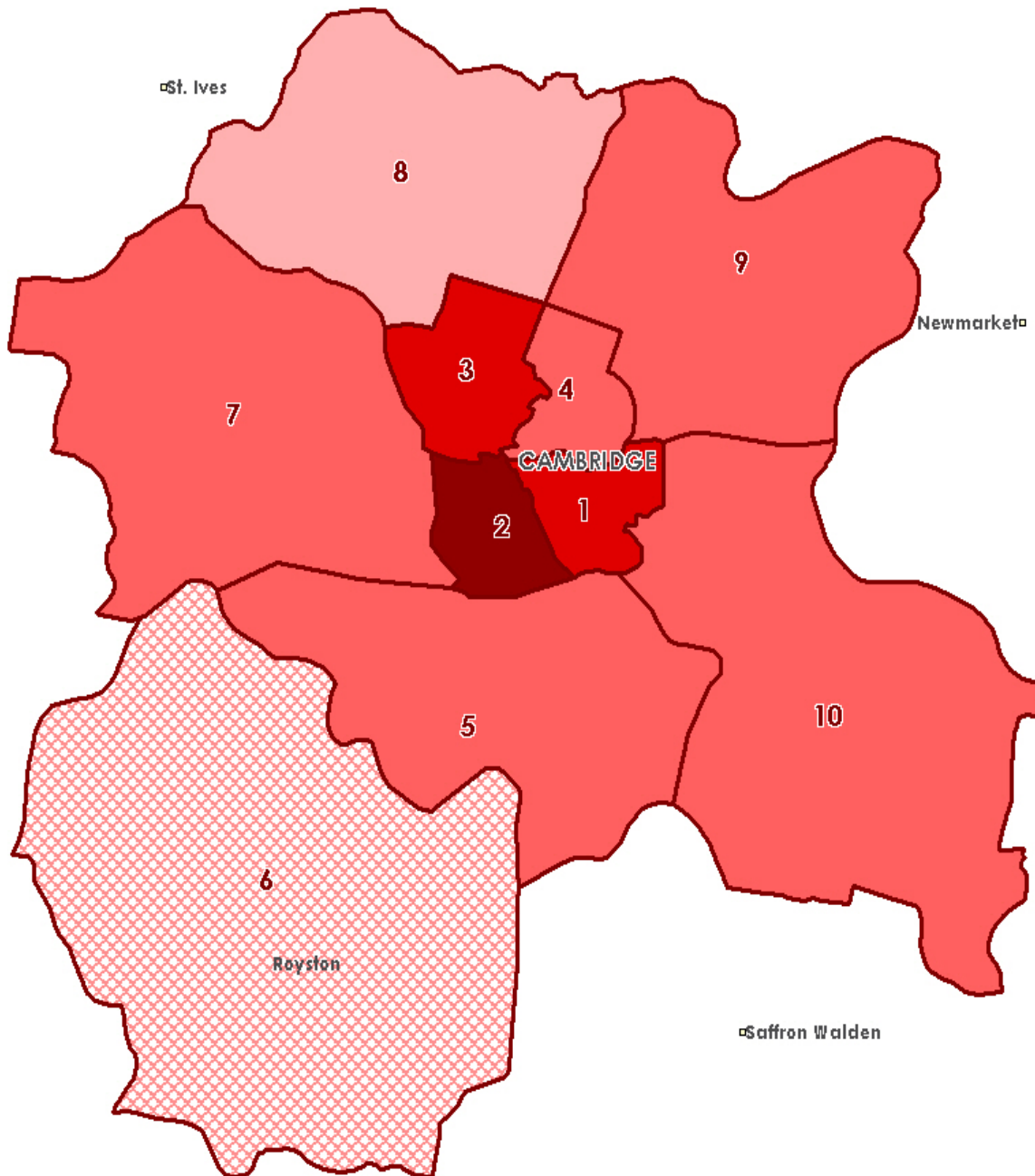
Plan 6  
Cambridge City  
Centre  
Comparison  
Goods Market  
Share





Huntingdon

St. Ives



St. Neots

Newmarket

Sandy

Biggleswade

Haverhill

Royston

Saffron Walden

Leitchworth Garden City



### Cambridge City Centre Comparison Goods Market Share (Historic Core and Fitzroy/Burleigh Street)

#### Key

 Study Area & Survey Zones

#### Comparison Goods Market Share (%)

 10 - 19.9

 20 - 29.9

 30 - 39.9

 40 - 49.9

 50 - 59.9

 60 - 69.9

 70 +

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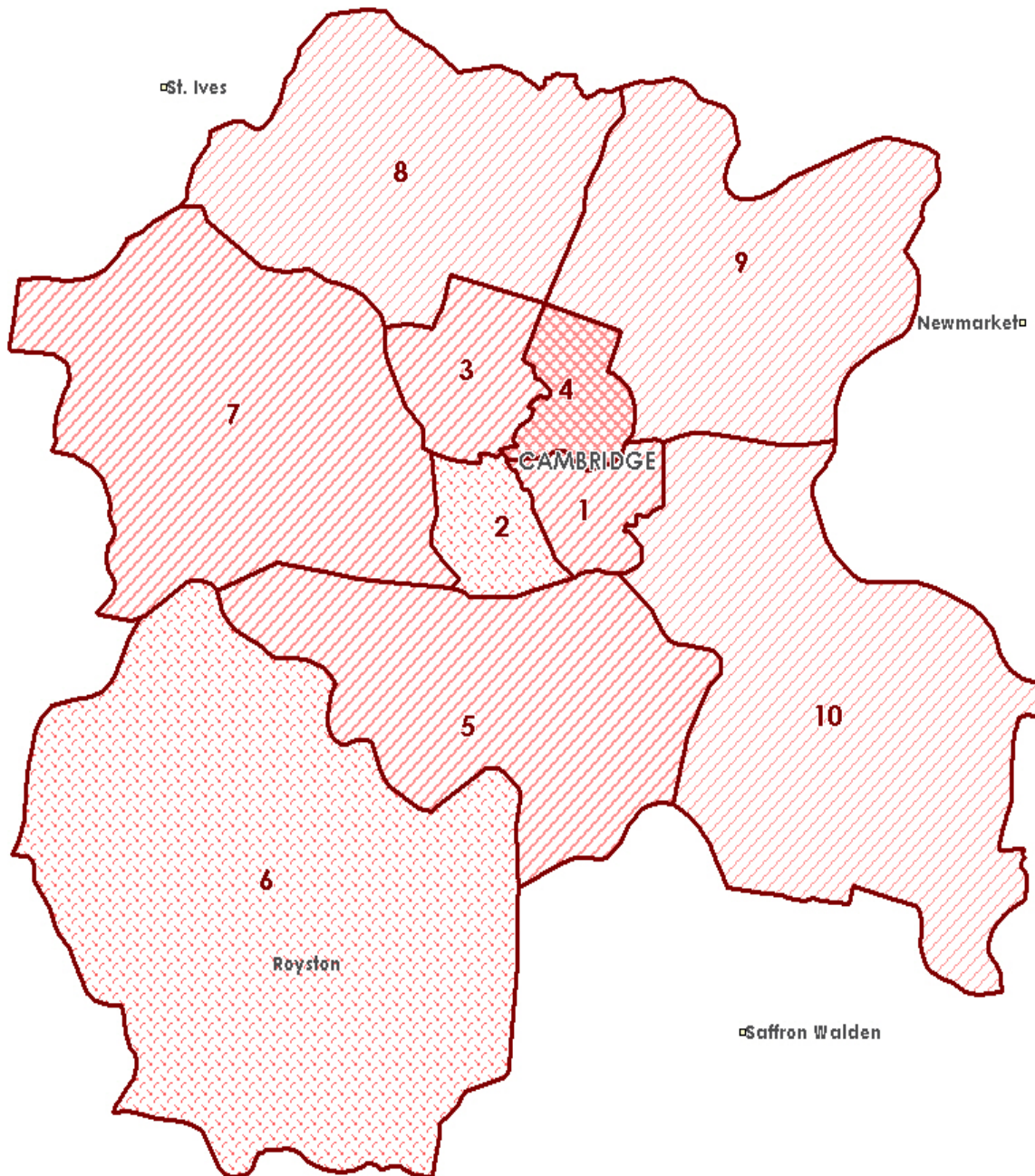


Plan 7  
Cambridge  
Out-of-Centre  
Comparison  
Goods Market  
Share



Huntingdon

St. Ives



St. Neots

Newmarket

CAMBRIDGE

Sandy

Biggleswade

Royston

Haverhill

Saffron Walden

Leitchworth Garden City





### Cambridge Retail Warehouse Comparison Goods Market Share

Key

 Study Area & Survey Zones

Comparison Goods Market Share (%)

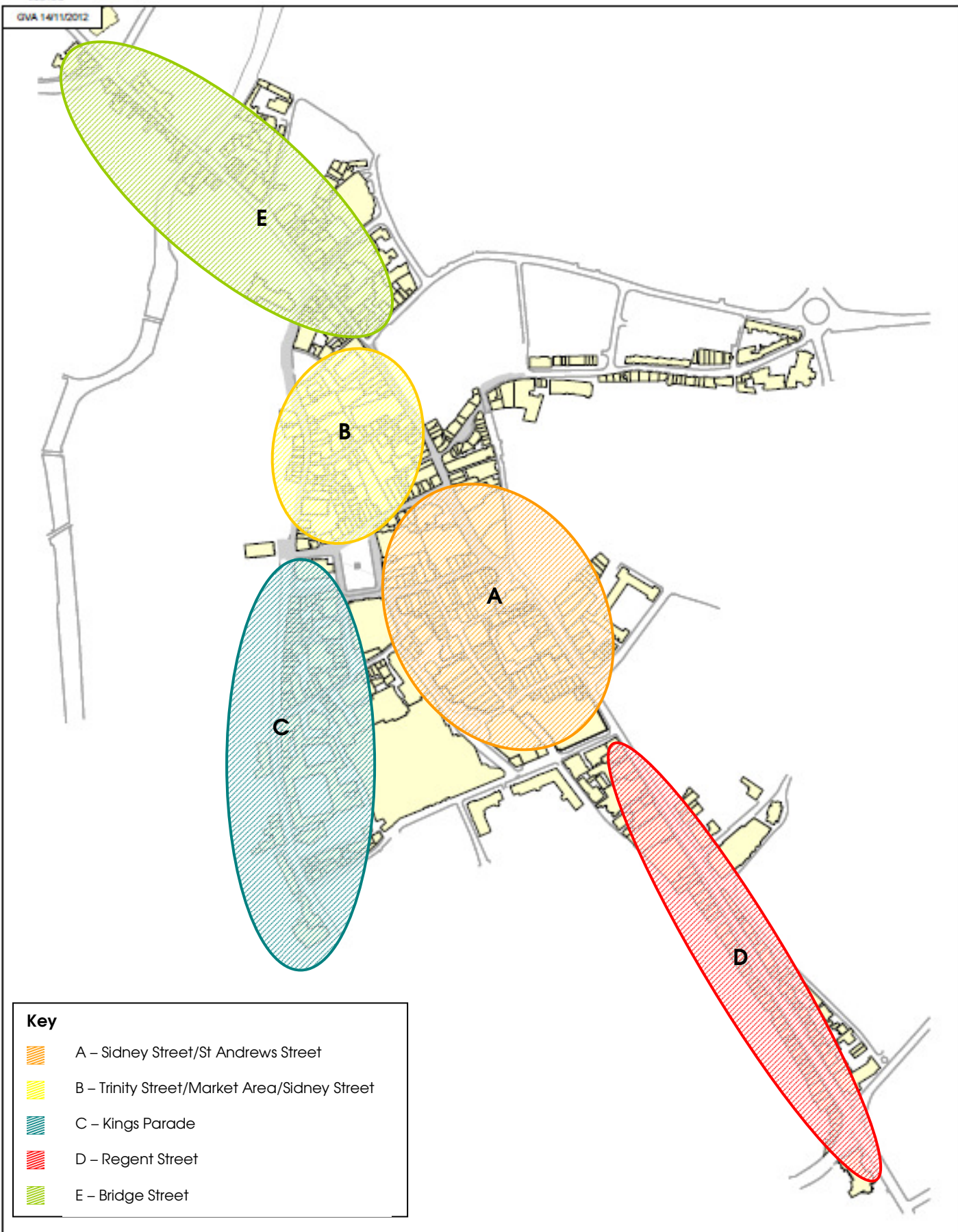
-  10 - 19.9
-  20 - 29.9
-  30 - 39.9
-  40 - 49.9
-  50 - 59.9
-  60 - 69.9
-  70 +

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Plan 8  
Cambridge  
Historic Core  
Character Areas







## Appendices



# Appendix 1 Local Centre Matrix

Centre	Current Classification	Total Number of Retail Units	Form / Layout	Location	Foodstore(s)	Policy Recommendation	Justification
Cherry Hinton High Street	Local Centre	31	High Street/Parade	Major Road/Junction	Tesco Express	Potential to re-classify as a District Centre	This centre offers a choice and range of small shops, including a small supermarket. Draws from a wider than local catchment.
Cherry Hinton Road West	Local Centre	24	High Street	Major Road/Junction	-	No Change	This centre comprises a range of small shops which are predominantly service-orientated. There is limited convenience goods provision but the centre is nevertheless likely to be performing an important local function.
Hills Road	Local Centre	23	High Street	Major Road/Junction	Co-op & Tesco Express	No Change	This centre offers a choice and range of small shops, including a small supermarket and is likely to be performing an important local function, beyond purely neighbourhood significance.
Chesterton High Street	Local Centre	19	Dispersed	Neighbourhood	Tesco Express	Potential to re-classify as a Neighbourhood Centre	This centre is currently dispersed and lacks any central focus. The Tesco store provides an important everyday convenience facility for the immediate local catchment and should be protected
Arbury Court	Local Centre	16	Precinct	Major Road/Junction	Budgens	Potential to re-classify as a District Centre	This centre offers a choice and range of small shops, including a small supermarket. Draws from a wider than local catchment.
Arbury Road/Milton Rd	Local Centre	16	High Street	Major Road/Junction	Co-op	No Change	This centre offers a reasonable choice and range of small shops, including a small supermarket and is likely to be performing an important local function, beyond purely neighbourhood significance.
Cherry Hinton Road East	Local Centre	13	High Street	Major Road/Junction	-	No Change	This centre comprises a range of small shops which are predominantly service-orientated. There is limited convenience goods provision but the centre is nevertheless considered likely to be performing an important local function.
Newnham Road	Local Centre	13	High Street	Major Road/Junction	Newnham Stores Grocery	No Change	The centre comprises a small range of shops, including speciality outlets, situated on Newnham Road. The convenience offer is limited to a small grocer and unlike conventional local centres, Newnham Road includes a small concentration of restaurants within the riverside setting. As such the centre is likely to serve a wider than local catchment, but its range of facilities is not such to justify classification as a district centre.
Histon Road	Local Centre	10	High Street	Major Road/Junction	Aldi, Co-op & Iceland	Potential to re-classify as a District Centre	Range of convenience stores, including an Aldi supermarket. Draws from a wider than local catchment.
Norfolk Street	Local Centre	10	Parade	Neighbourhood	Local Express	Potential to re-classify as a Neighbourhood Centre	This centre is tightly embedded within a residential area and is only likely to be serving the everyday needs of a limited, local catchment.
Wulfstan Way	Local Centre	9	Parade	Neighbourhood	Express Convenience & General Store	Potential to re-classify as a Neighbourhood Centre	This centre is tightly embedded within a residential area and is only likely to be serving the everyday needs of a limited, local catchment.
Barnwell Road	Local Centre	8	Parade	Major Road/Junction	Spar	No change	The road network presents a significant physical barrier which limits the extent to which the parade and the drive-thru can operate as a single, cohesive destination.
Trumpington	Local Centre	8	Parade	Major Road/Junction	Co-op	No Change	This is the main centre in this part of the City and is therefore likely to be serving an important local function, beyond purely neighbourhood significance.
Grantchester Street	Local Centre	6	Dispersed	Neighbourhood	Co-op	Potential to re-classify as a Neighbourhood Centre	This centre is currently dispersed and lacks any central focus. The Co-op store provides an important everyday convenience facility for the immediate local catchment and should be protected.
Victoria Road	Local Centre	6	Dispersed	Major Road/Junction	Express Victoria Road	Potential to re-classify as a Neighbourhood Centre	This centre is currently dispersed and there is no obvious centre or retail anchor around which to apply focus. The Express Store provides an important everyday convenience facility for the immediate catchment and should be protected.
Adkins Corner	Local Centre	5	Parade	Major Road/Junction	Budgens	Potential to re-classify as a Neighbourhood Centre	Anchored by Budgens, this centre contains few shops/services. Whilst the centre is positioned on a major road junction, there is limited parking/opportunity for people to stop.
Ditton Lane	Local Centre	5	Parade	Neighbourhood	One Stop	Potential to re-classify as a Neighbourhood Centre	This centre is very small with a limited range of shops and services. It is only likely to be serving the everyday needs of a limited, local catchment.
Green End Road	Local Centre	5	Dispersed	Neighbourhood	General Store	Potential to re-classify as a Neighbourhood Centre	This centre is currently dispersed and there is no obvious centre or retail anchor around which to apply focus.
Akeman Street	Local Centre	4	Parade	Neighbourhood	General Store	Potential to re-classify as a Neighbourhood Centre	This centre is very small with a limited range of shops and services. It is only likely to be serving the everyday needs of a limited, local catchment.
Fairfax Road	Local Centre	4	Parade	Neighbourhood	-	Potential to re-classify as a Neighbourhood Centre	This centre is very small with a limited range of shops and services. It is only likely to be serving the everyday needs of a limited, local catchment.
King Hedges Road	Local Centre	4	Dispersed	Major Road/Junction	Co-op	Potential to re-classify as a Neighbourhood Centre	This centre contains few shops/services and is dispersed in nature. Whilst the centre is positioned on a major road junction, there is limited parking/opportunity for people to stop.
Campkin Road	Local Centre	3	Parade	Neighbourhood	Tesco Express	Potential to re-classify as a Neighbourhood Centre	This centre is very small with a limited range of shops and services. It is only likely to be serving the everyday needs of a limited, local catchment.



Appendix 2  
Convenience  
Capacity  
Forecasts

# Cambridge City Council

## Retail and Leisure Study 2013

**Table 1**  
**Survey Area Population Forecasts**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
<b>2012</b>	49,398	27,427	44,124	33,126	26,656	39,050	26,844	20,258	17,654	15,650	<b>300,187</b>
<b>2017</b>	51,352	27,949	45,488	34,389	27,644	40,874	29,010	21,544	18,806	16,274	<b>313,330</b>
<b>2022</b>	53,079	28,525	46,943	35,603	28,646	42,715	31,062	22,773	19,905	16,907	<b>326,158</b>
<b>2027</b>	55,278	29,307	48,708	37,129	29,572	44,411	32,819	23,851	20,879	17,491	<b>339,445</b>
<b>2031</b>	55,615	29,451	49,055	37,378	29,717	44,735	33,143	24,007	21,048	17,598	<b>341,747</b>

Source: Experian Micromarketer, October 2012

Postal Sectors	
Zone 1	CB 1 1/2/3/7/8/9
Zone 2	CB2 0/1/3/7/8/9, CB3 9
Zone 3	CB3 0, CB4 2/3, CB24 9
Zone 4	CB4 0/1, CB5 8, CB24 6
Zone 5	CB22 3/4/5/6/7, CB23 1
Zone 6	SG8 0/5/6/7/8/9
Zone 7	CB23 2/3/7/8/9/7/8
Zone 8	CB24 3/4/5/8
Zone 9	CB25 0/9
Zone 10	CB21 4/5/6

# Cambridge City Council Retail and Leisure Study 2013

Table 2  
Per Capita Convenience Goods Expenditure (2010 Prices)

Growth in convenience goods spending per capita:										
2010-2011	-3.0% pa									
2011-2012	0.1% pa									
2012-2017	0.3% pa									
2017-2022	0.7% pa									
2022-2031	0.8% pa									
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
<b>2010</b>	1,879	1,181	1,792	1,823	2,102	1,982	2,034	2,077	2,076	2,062
<b>2012</b>	1,824	1,147	1,740	1,770	2,041	1,924	1,975	2,017	2,016	2,002
<b>2012 Minus SFT at 2.0%</b>	<b>1,788</b>	<b>1,124</b>	<b>1,705</b>	<b>1,735</b>	<b>2,000</b>	<b>1,886</b>	<b>1,935</b>	<b>1,976</b>	<b>1,975</b>	<b>1,962</b>
<b>2017</b>	1,852	1,164	1,766	1,797	2,072	1,954	2,005	2,047	2,046	2,032
<b>2017 Minus SFT at 3.1%</b>	<b>1,795</b>	<b>1,128</b>	<b>1,711</b>	<b>1,741</b>	<b>2,008</b>	<b>1,893</b>	<b>1,943</b>	<b>1,984</b>	<b>1,983</b>	<b>1,969</b>
<b>2022</b>	1,918	1,205	1,829	1,861	2,145	2,023	2,076	2,120	2,119	2,104
<b>2022 Minus SFT at 4.1%</b>	<b>1,839</b>	<b>1,156</b>	<b>1,754</b>	<b>1,784</b>	<b>2,057</b>	<b>1,940</b>	<b>1,991</b>	<b>2,033</b>	<b>2,032</b>	<b>2,018</b>
<b>2027</b>	1,996	1,254	1,903	1,936	2,233	2,105	2,160	2,206	2,205	2,190
<b>2027 Minus SFT at 4.5%</b>	<b>1,906</b>	<b>1,198</b>	<b>1,818</b>	<b>1,849</b>	<b>2,132</b>	<b>2,010</b>	<b>2,063</b>	<b>2,107</b>	<b>2,106</b>	<b>2,091</b>
<b>2031</b>	2,060	1,295	1,965	1,999	2,305	2,173	2,230	2,277	2,276	2,261
<b>2031 Minus SFT at 4.8%</b>	<b>1,961</b>	<b>1,233</b>	<b>1,871</b>	<b>1,903</b>	<b>2,194</b>	<b>2,069</b>	<b>2,123</b>	<b>2,168</b>	<b>2,167</b>	<b>2,152</b>

Source: Experian Micromarketer, October 2012

Table 3  
Total Survey Area Convenience Goods Expenditure (2010 Prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
<b>2012</b>	88,322	30,822	75,239	57,463	53,316	73,647	51,955	40,037	34,874	30,707	<b>536,383</b>
<b>2017</b>	92,155	31,525	77,852	59,874	55,497	77,372	56,355	42,736	37,287	32,049	<b>562,702</b>
<b>2022</b>	97,617	32,973	82,335	63,526	58,935	82,863	61,838	46,295	40,445	34,122	<b>600,948</b>
<b>2027</b>	105,352	35,106	88,532	68,654	63,049	89,281	67,708	50,247	43,964	36,582	<b>648,475</b>
<b>2031</b>	109,083	36,307	91,761	71,129	65,203	92,552	70,369	52,050	45,612	37,878	<b>671,945</b>

Source: Tables 1 and 2

**Cambridge City Council  
Retail and Leisure Study 2013**

**Table 4  
Convenience Goods Allocation - % Market Share**

Zone Centre / Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)
<b>CAMBRIDGE CITY CENTRE</b>										
Sainsbury's, Sidney Street	0.8%	10.2%	1.9%	1.4%	0.4%	0.4%	0.0%	0.0%	0.0%	0.0%
M&S, Sidney Street	0.4%	2.5%	1.5%	0.4%	1.3%	0.4%	0.0%	0.0%	0.0%	0.7%
Other, Cambridge Historic Centre	1.9%	2.0%	1.5%	0.0%	0.8%	0.0%	0.8%	0.0%	0.0%	0.4%
Little Waitrose, Fitzroy Street	1.1%	0.0%	0.4%	1.4%	0.4%	0.0%	0.0%	0.0%	0.4%	0.0%
<b>Total Cambridge City Centre</b>	<b>4.1%</b>	<b>14.6%</b>	<b>5.2%</b>	<b>3.3%</b>	<b>3.0%</b>	<b>0.8%</b>	<b>0.8%</b>	<b>0.0%</b>	<b>0.4%</b>	<b>1.1%</b>
<b>CAMBRIDGE DISTRICT &amp; LOCAL CENTRES</b>										
Local Stores, Mill Road East	10.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%
Co-op, Chesterton Road, Mitchams Corner	0.0%	0.0%	1.9%	7.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Budgen's, Adkins Corner	4.8%	1.7%	1.1%	0.4%	0.4%	0.0%	0.0%	0.0%	0.0%	0.4%
Budgen's, Arbury Court	0.0%	0.0%	2.6%	0.7%	0.0%	0.0%	0.0%	0.4%	0.4%	0.0%
Co-op, Milton Road	0.0%	0.0%	0.4%	5.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Cherry Hinton High Street	0.7%	0.4%	0.0%	1.4%	1.3%	0.0%	0.4%	0.0%	0.8%	0.0%
Tesco, Chesterton High Street	0.0%	0.0%	0.0%	2.6%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Grantchester Street	0.0%	9.4%	0.4%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%
Local Shops, Hills Road	0.4%	2.7%	0.4%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops, Histon Road	1.1%	1.1%	24.8%	2.2%	1.6%	0.4%	2.0%	6.1%	1.5%	0.0%
<b>Total Cambridge District &amp; Local Centres</b>	<b>17.5%</b>	<b>15.2%</b>	<b>31.6%</b>	<b>20.1%</b>	<b>4.6%</b>	<b>0.4%</b>	<b>2.8%</b>	<b>6.8%</b>	<b>2.7%</b>	<b>0.4%</b>
<b>CAMBRIDGE OUT-OF-CENTRE</b>										
Asda, Beehive	13.9%	0.7%	2.2%	7.7%	2.4%	0.0%	0.8%	1.9%	4.2%	1.4%
M&S, Beehive	1.9%	1.5%	0.7%	0.0%	0.8%	0.0%	0.0%	1.8%	0.4%	0.0%
Sainsbury's, Coldhams Lane	24.4%	13.6%	7.3%	10.2%	4.9%	1.2%	2.7%	2.3%	8.1%	4.7%
Tesco, Cheddars Lane	3.8%	4.2%	7.7%	25.3%	0.0%	0.0%	0.8%	0.8%	7.7%	0.7%
Waitrose, Trumpington	2.3%	33.1%	8.4%	2.1%	20.2%	4.6%	4.2%	0.8%	0.0%	4.3%
<b>Total Cambridge Out of Centre</b>	<b>46.2%</b>	<b>53.1%</b>	<b>26.3%</b>	<b>45.3%</b>	<b>28.3%</b>	<b>5.7%</b>	<b>8.5%</b>	<b>7.6%</b>	<b>20.4%</b>	<b>11.2%</b>
<b>OUTSIDE CITY BOUNDARY</b>										
Tesco Extra, Bar Hill	0.0%	2.8%	6.6%	2.5%	7.3%	0.8%	37.6%	53.2%	0.0%	0.7%
Tesco Extra, Royston	0.0%	0.0%	0.0%	0.0%	13.1%	57.6%	1.5%	0.0%	0.0%	0.0%
Tesco, Yarrow Road, Cherry Hinton	23.6%	2.8%	0.0%	2.2%	13.9%	0.0%	0.4%	0.0%	9.6%	20.4%
Tesco, Cambridge Road Industrial Estate, Milton	1.9%	0.0%	13.9%	18.2%	1.3%	0.0%	1.6%	2.7%	13.9%	0.7%
Morrisons, Cambourne	0.0%	1.1%	3.6%	0.7%	1.6%	0.8%	37.7%	3.8%	0.4%	0.4%
Tesco, Fordham Road, Newmarket	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.8%	0.0%
<b>Total Outside City Boundary</b>	<b>25.5%</b>	<b>6.8%</b>	<b>24.1%</b>	<b>23.7%</b>	<b>37.2%</b>	<b>59.1%</b>	<b>78.8%</b>	<b>59.7%</b>	<b>34.7%</b>	<b>22.2%</b>
Other	6.7%	10.2%	12.8%	7.7%	26.9%	34.0%	9.1%	25.8%	41.8%	65.1%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Cambridge City Telephone Survey, November 2012



**Cambridge City Council  
Retail and Leisure Study 2013**

**2012 Baseline**

**Table 5  
Convenience Goods Allocation 2012 - Spend (£) 2010 Prices**

Zone Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	Zone 10 (£000)	Total (£000)
<b>CAMBRIDGE CITY CENTRE</b>											
Sainsbury's, Sidney Street	665	3,129	1,406	821	235	287	0	0	0	0	6,542
M&S, Sidney Street	327	782	1,120	227	706	287	0	0	0	222	3,671
Other, Cambridge Historic Centre	1,646	603	1,120	0	434	0	416	0	0	118	4,337
Little Waitrose, Fitzroy Street	992	0	286	821	235	0	0	0	138	0	2,471
<b>Total Cambridge City Centre</b>	<b>3,630</b>	<b>4,514</b>	<b>3,932</b>	<b>1,868</b>	<b>1,610</b>	<b>574</b>	<b>416</b>	<b>0</b>	<b>138</b>	<b>340</b>	<b>17,022</b>
<b>CAMBRIDGE DISTRICT &amp; LOCAL CENTRES</b>											
Local Stores, Mill Road East	9,223	0	0	0	0	0	0	141	0	0	9,364
Co-op, Chesterton Road, Mitchams Corner	0	0	1,429	4,180	0	0	0	0	0	0	5,609
Budgen's, Adkins Corner	4,253	514	835	227	235	0	0	0	0	118	6,181
Budgen's, Arbury Court	0	0	1,977	411	0	0	0	141	138	0	2,667
Co-op, Milton Road	0	0	286	3,133	0	0	0	0	0	0	3,418
Tesco Express, Cherry Hinton High Street	654	128	0	821	669	0	208	0	275	0	2,756
Tesco, Chesterton High Street	0	0	0	1,501	434	0	0	0	0	0	1,935
Co-op, Grantchester Street	0	2,888	286	0	0	0	208	0	0	0	3,381
Local Shops, Hills Road	327	821	286	0	235	0	0	0	0	0	1,669
Local Shops, Histon Road	992	346	18,641	1,274	868	287	1,023	2,434	537	0	26,402
<b>Total Cambridge District &amp; Local Centres</b>	<b>15,449</b>	<b>4,697</b>	<b>23,739</b>	<b>11,546</b>	<b>2,442</b>	<b>287</b>	<b>1,439</b>	<b>2,716</b>	<b>950</b>	<b>118</b>	<b>63,383</b>
<b>CAMBRIDGE OUT-OF-CENTRE</b>											
Asda, Beehive	12,262	218	1,668	4,418	1,302	0	416	764	1,479	443	22,970
M&S, Beehive	1,646	475	549	0	434	0	0	735	138	0	3,977
Sainsbury's, Colchams Lane	21,558	4,180	5,509	5,833	2,604	847	1,407	934	2,820	1,448	47,139
Tesco, Cheddars Lane	3,324	1,307	5,772	14,539	0	0	400	311	2,683	222	28,558
Waitrose, Trumpington	1,994	10,196	6,320	1,231	10,760	3,362	2,206	311	0	1,329	37,712
<b>Total Cambridge Out of Centre</b>	<b>40,784</b>	<b>16,376</b>	<b>19,819</b>	<b>26,021</b>	<b>15,100</b>	<b>4,210</b>	<b>4,428</b>	<b>3,056</b>	<b>7,119</b>	<b>3,442</b>	<b>140,355</b>
<b>OUTSIDE CITY BOUNDARY</b>											
Tesco Extra, Bar Hill	0	872	4,938	1,458	3,906	560	19,519	21,314	0	222	52,789
Tesco Extra, Royston	0	0	0	0	6,980	42,395	799	0	0	0	50,175
Tesco, Yarrow Road, Cherry Hinton	20,862	872	0	1,274	7,414	0	208	0	3,364	6,263	40,257
Tesco, Cambridge Road Industrial Estate, Milton	1,657	0	10,424	10,477	669	0	815	1,075	4,836	222	30,176
Morrisons, Cambourne	0	346	2,743	411	868	560	19,583	1,528	138	118	26,295
Tesco, Fordham Road, Newmarket	0	0	0	0	0	0	0	0	3,756	0	3,756
<b>Total Outside City Boundary</b>	<b>22,519</b>	<b>2,090</b>	<b>18,104</b>	<b>13,620</b>	<b>19,837</b>	<b>43,516</b>	<b>40,925</b>	<b>23,917</b>	<b>12,093</b>	<b>6,825</b>	<b>203,447</b>
Other	5,939	3,145	9,645	4,408	14,326	25,061	4,748	10,347	14,575	19,983	112,177
<b>Total</b>	<b>88,322</b>	<b>30,822</b>	<b>75,239</b>	<b>57,463</b>	<b>53,316</b>	<b>73,647</b>	<b>51,955</b>	<b>40,037</b>	<b>34,874</b>	<b>30,707</b>	<b>536,383</b>

Source: Tables 3 & 4

**Cambridge City Council  
Retail and Leisure Study 2013**

**2017 Baseline**

**Table 6  
Convenience Goods Allocation 2017 - Spend (£) 2010 Prices**

Zone Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	Zone 10 (£000)	Total (£000)
<b>CAMBRIDGE CITY CENTRE</b>											
Sainsbury's, Sidney Street	693	3,200	1,455	855	245	302	0	0	0	0	6,750
M&S, Sidney Street	341	800	1,159	236	735	302	0	0	0	231	3,804
Other, Cambridge Historic Centre	1,717	617	1,159	0	452	0	451	0	0	123	4,519
Little Waitrose, Fitzroy Street	1,035	0	296	855	245	0	0	0	147	0	2,578
<b>Total Cambridge City Centre</b>	<b>3,787</b>	<b>4,617</b>	<b>4,069</b>	<b>1,946</b>	<b>1,676</b>	<b>603</b>	<b>451</b>	<b>0</b>	<b>147</b>	<b>355</b>	<b>17,651</b>
<b>CAMBRIDGE DISTRICT &amp; LOCAL CENTRES</b>											
Local Stores, Mill Road East	9,623	0	0	0	0	0	0	151	0	0	9,774
Co-op, Chesterton Road, Mitchams Corner	0	0	1,478	4,355	0	0	0	0	0	0	5,834
Budgen's, Adkins Corner	4,437	525	864	236	245	0	0	0	0	123	6,431
Budgen's, Arbury Court	0	0	2,046	428	0	0	0	151	147	0	2,772
Co-op, Milton Road	0	0	296	3,264	0	0	0	0	0	0	3,560
Tesco Express, Cherry Hinton High Street	683	131	0	855	697	0	225	0	294	0	2,885
Tesco, Chesterton High Street	0	0	0	1,564	452	0	0	0	0	0	2,016
Co-op, Grantchester Street	0	2,954	296	0	0	0	225	0	0	0	3,475
Local Shops, Hills Road	341	840	296	0	245	0	0	0	0	0	1,722
Local Shops, Histon Road	1,035	354	19,289	1,328	904	302	1,110	2,598	574	0	27,492
<b>Total Cambridge District &amp; Local Centres</b>	<b>16,120</b>	<b>4,804</b>	<b>24,563</b>	<b>12,030</b>	<b>2,542</b>	<b>302</b>	<b>1,560</b>	<b>2,899</b>	<b>1,015</b>	<b>123</b>	<b>65,960</b>
<b>CAMBRIDGE OUT-OF-CENTRE</b>											
Asda, Beehive	12,794	223	1,726	4,604	1,355	0	451	815	1,581	462	24,012
M&S, Beehive	1,717	486	568	0	452	0	0	785	147	0	4,155
Sainsbury's, Colchams Lane	22,493	4,275	5,700	6,077	2,710	890	1,526	997	3,015	1,511	49,196
Tesco, Cheddars Lane	3,469	1,337	5,973	15,149	0	0	434	332	2,868	231	29,793
Waitrose, Trumpington	2,081	10,429	6,540	1,283	11,200	3,532	2,393	332	0	1,388	39,178
<b>Total Cambridge Out of Centre</b>	<b>42,554</b>	<b>16,749</b>	<b>20,507</b>	<b>27,113</b>	<b>15,717</b>	<b>4,423</b>	<b>4,803</b>	<b>3,262</b>	<b>7,612</b>	<b>3,592</b>	<b>146,333</b>
<b>OUTSIDE CITY BOUNDARY</b>											
Tesco Extra, Bar Hill	0	892	5,109	1,519	4,065	589	21,172	22,751	0	231	56,329
Tesco Extra, Royston	0	0	0	0	7,266	44,539	867	0	0	0	52,672
Tesco, Yarrow Road, Cherry Hinton	21,768	892	0	1,328	7,717	0	225	0	3,596	6,537	42,063
Tesco, Cambridge Road Industrial Estate, Milton	1,729	0	10,786	10,917	697	0	884	1,148	5,170	231	31,562
Morrisons, Cambourne	0	354	2,838	428	904	589	21,241	1,631	147	123	28,255
Tesco, Fordham Road, Newmarket	0	0	0	0	0	0	0	0	4,015	0	4,015
<b>Total Outside City Boundary</b>	<b>23,497</b>	<b>2,138</b>	<b>18,733</b>	<b>14,192</b>	<b>20,649</b>	<b>45,717</b>	<b>44,390</b>	<b>25,530</b>	<b>12,929</b>	<b>7,123</b>	<b>214,897</b>
Other	6,197	3,216	9,980	4,593	14,912	26,328	5,150	11,045	15,583	20,856	117,861
<b>Total</b>	<b>92,155</b>	<b>31,525</b>	<b>77,852</b>	<b>59,874</b>	<b>55,497</b>	<b>77,372</b>	<b>56,355</b>	<b>42,736</b>	<b>37,287</b>	<b>32,049</b>	<b>562,702</b>

Source: Tables 3 & 4

**Cambridge City Council  
Retail and Leisure Study 2013**

**2022 Baseline**

**Table 7  
Convenience Goods Allocation 2022 - Spend (£) 2010 Prices**

Zone Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	Zone 10 (£000)	Total (£000)
<b>CAMBRIDGE CITY CENTRE</b>											
Sainsbury's, Sidney Street	735	3,347	1,539	907	260	323	0	0	0	0	7,111
M&S, Sidney Street	362	837	1,226	251	780	323	0	0	0	246	4,024
Other, Cambridge Historic Centre	1,819	645	1,226	0	480	0	495	0	0	131	4,796
Little Waitrose, Fitzroy Street	1,096	0	313	907	260	0	0	0	160	0	2,736
<b>Total Cambridge City Centre</b>	<b>4,012</b>	<b>4,829</b>	<b>4,303</b>	<b>2,065</b>	<b>1,780</b>	<b>646</b>	<b>495</b>	<b>0</b>	<b>160</b>	<b>377</b>	<b>18,667</b>
<b>CAMBRIDGE DISTRICT &amp; LOCAL CENTRES</b>											
Local Stores, Mill Road East	10,194	0	0	0	0	0	0	163	0	0	10,357
Co-op, Chesterton Road, Mitchams Corner	0	0	1,563	4,621	0	0	0	0	0	0	6,184
Budgen's, Adkins Corner	4,700	550	913	251	260	0	0	0	0	131	6,805
Budgen's, Arbury Court	0	0	2,164	454	0	0	0	163	160	0	2,941
Co-op, Milton Road	0	0	313	3,463	0	0	0	0	0	0	3,776
Tesco Express, Cherry Hinton High Street	723	137	0	907	740	0	247	0	319	0	3,074
Tesco, Chesterton High Street	0	0	0	1,659	480	0	0	0	0	0	2,139
Co-op, Grantchester Street	0	3,089	313	0	0	0	247	0	0	0	3,649
Local Shops, Hills Road	362	878	313	0	260	0	0	0	0	0	1,813
Local Shops, Histon Road	1,096	370	20,399	1,409	960	323	1,218	2,814	623	0	29,212
<b>Total Cambridge District &amp; Local Centres</b>	<b>17,075</b>	<b>5,025</b>	<b>25,978</b>	<b>12,764</b>	<b>2,699</b>	<b>323</b>	<b>1,712</b>	<b>3,141</b>	<b>1,101</b>	<b>131</b>	<b>69,950</b>
<b>CAMBRIDGE OUT-OF-CENTRE</b>											
Asda, Beehive	13,552	233	1,826	4,884	1,439	0	495	883	1,715	492	25,520
M&S, Beehive	1,819	508	601	0	480	0	0	850	160	0	4,417
Sainsbury's, Colchams Lane	23,827	4,471	6,028	6,448	2,878	953	1,674	1,080	3,271	1,609	52,240
Tesco, Cheddars Lane	3,674	1,399	6,317	16,073	0	0	476	360	3,111	246	31,655
Waitrose, Trumpington	2,204	10,908	6,916	1,361	11,894	3,783	2,626	360	0	1,477	41,530
<b>Total Cambridge Out of Centre</b>	<b>45,077</b>	<b>17,519</b>	<b>21,688</b>	<b>28,766</b>	<b>16,691</b>	<b>4,736</b>	<b>5,271</b>	<b>3,534</b>	<b>8,257</b>	<b>3,824</b>	<b>155,363</b>
<b>OUTSIDE CITY BOUNDARY</b>											
Tesco Extra, Bar Hill	0	933	5,403	1,612	4,317	631	23,232	24,645	0	246	61,019
Tesco Extra, Royston	0	0	0	0	7,716	47,700	951	0	0	0	56,367
Tesco, Yarrow Road, Cherry Hinton	23,058	933	0	1,409	8,196	0	247	0	3,901	6,960	44,703
Tesco, Cambridge Road Industrial Estate, Milton	1,831	0	11,407	11,583	740	0	970	1,243	5,608	246	33,629
Morrisons, Cambourne	0	370	3,002	454	960	631	23,308	1,767	160	131	30,782
Tesco, Fordham Road, Newmarket	0	0	0	0	0	0	0	0	4,355	0	4,355
<b>Total Outside City Boundary</b>	<b>24,889</b>	<b>2,236</b>	<b>19,812</b>	<b>15,057</b>	<b>21,928</b>	<b>48,961</b>	<b>48,709</b>	<b>27,656</b>	<b>14,024</b>	<b>7,584</b>	<b>230,856</b>
Other	6,565	3,364	10,554	4,873	15,836	28,197	5,651	11,965	16,903	22,205	126,113
<b>Total</b>	<b>97,617</b>	<b>32,973</b>	<b>82,335</b>	<b>63,526</b>	<b>58,935</b>	<b>82,863</b>	<b>61,838</b>	<b>46,295</b>	<b>40,445</b>	<b>34,122</b>	<b>600,948</b>

Source: Tables 3 & 4

**Cambridge City Council  
Retail and Leisure Study 2013**

**2027 Baseline**

**Table 8  
Convenience Goods Allocation 2027 - Spend (£) 2010 Prices**

Zone Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	Zone 10 (£000)	Total (£000)
<b>CAMBRIDGE CITY CENTRE</b>											
Sainsbury's, Sidney Street	793	3,564	1,654	980	278	348	0	0	0	0	<b>7,618</b>
M&S, Sidney Street	390	891	1,318	271	835	348	0	0	0	264	<b>4,317</b>
Other, Cambridge Historic Centre	1,963	687	1,318	0	513	0	542	0	0	141	<b>5,164</b>
Little Waitrose, Fitzroy Street	1,183	0	336	980	278	0	0	0	173	0	<b>2,951</b>
<b>Total Cambridge City Centre</b>	<b>4,330</b>	<b>5,142</b>	<b>4,627</b>	<b>2,232</b>	<b>1,904</b>	<b>696</b>	<b>542</b>	<b>0</b>	<b>173</b>	<b>405</b>	<b>20,050</b>
<b>CAMBRIDGE DISTRICT &amp; LOCAL CENTRES</b>											
Local Stores, Mill Road East	11,001	0	0	0	0	0	0	177	0	0	<b>11,179</b>
Co-op, Chesterton Road, Mitchams Corner	0	0	1,681	4,994	0	0	0	0	0	0	<b>6,675</b>
Budgen's, Adkins Corner	5,073	585	982	271	278	0	0	0	0	141	<b>7,330</b>
Budgen's, Arbury Court	0	0	2,327	491	0	0	0	177	173	0	<b>3,168</b>
Co-op, Milton Road	0	0	336	3,743	0	0	0	0	0	0	<b>4,079</b>
Tesco Express, Cherry Hinton High Street	780	146	0	980	792	0	271	0	347	0	<b>3,316</b>
Tesco, Chesterton High Street	0	0	0	1,793	513	0	0	0	0	0	<b>2,307</b>
Co-op, Grantchester Street	0	3,289	336	0	0	0	271	0	0	0	<b>3,896</b>
Local Shops, Hills Road	390	935	336	0	278	0	0	0	0	0	<b>1,940</b>
Local Shops, Histon Road	1,183	394	21,935	1,522	1,027	348	1,333	3,054	677	0	<b>31,474</b>
<b>Total Cambridge District &amp; Local Centres</b>	<b>18,428</b>	<b>5,350</b>	<b>27,933</b>	<b>13,794</b>	<b>2,888</b>	<b>348</b>	<b>1,875</b>	<b>3,409</b>	<b>1,197</b>	<b>141</b>	<b>75,363</b>
<b>CAMBRIDGE OUT-OF-CENTRE</b>											
Asda, Beehive	14,626	248	1,963	5,279	1,539	0	542	959	1,865	528	<b>27,548</b>
M&S, Beehive	1,963	541	646	0	513	0	0	923	173	0	<b>4,759</b>
Sainsbury's, Cokchams Lane	25,715	4,761	6,482	6,969	3,079	1,027	1,833	1,172	3,555	1,725	<b>56,318</b>
Tesco, Cheddars Lane	3,965	1,489	6,792	17,370	0	0	521	391	3,382	264	<b>34,174</b>
Waitrose, Trumpington	2,379	11,614	7,437	1,471	12,724	4,076	2,875	391	0	1,584	<b>44,551</b>
<b>Total Cambridge Out of Centre</b>	<b>48,648</b>	<b>18,652</b>	<b>23,320</b>	<b>31,089</b>	<b>17,856</b>	<b>5,103</b>	<b>5,771</b>	<b>3,835</b>	<b>8,975</b>	<b>4,100</b>	<b>167,351</b>
<b>OUTSIDE CITY BOUNDARY</b>											
Tesco Extra, Bar Hill	0	993	5,810	1,742	4,619	679	25,437	26,749	0	264	<b>66,293</b>
Tesco Extra, Royston	0	0	0	0	8,254	51,395	1,042	0	0	0	<b>60,691</b>
Tesco, Yarrow Road, Cherry Hinton	24,885	993	0	1,522	8,768	0	271	0	4,240	7,462	<b>48,141</b>
Tesco, Cambridge Road Industrial Estate, Milton	1,977	0	12,266	12,518	792	0	1,063	1,350	6,096	264	<b>36,324</b>
Morrisons, Cambourne	0	394	3,228	491	1,027	679	25,520	1,918	173	141	<b>33,571</b>
Tesco, Fordham Road, Newmarket	0	0	0	0	0	0	0	0	4,734	0	<b>4,734</b>
<b>Total Outside City Boundary</b>	<b>26,861</b>	<b>2,380</b>	<b>21,303</b>	<b>16,273</b>	<b>23,459</b>	<b>52,753</b>	<b>53,333</b>	<b>30,016</b>	<b>15,245</b>	<b>8,130</b>	<b>249,754</b>
Other	7,085	3,582	11,349	5,266	16,942	30,380	6,188	12,986	18,374	23,806	<b>135,957</b>
<b>Total</b>	<b>105,352</b>	<b>35,106</b>	<b>88,532</b>	<b>68,654</b>	<b>63,049</b>	<b>89,281</b>	<b>67,708</b>	<b>50,247</b>	<b>43,964</b>	<b>36,582</b>	<b>648,475</b>

Source: Tables 3 & 4

**Cambridge City Council  
Retail and Leisure Study 2013**

**2031 Baseline**

**Table 9  
Convenience Goods Allocation 2031 - Spend (£) 2010 Prices**

Zone Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	Zone 10 (£000)	Total (£000)
<b>CAMBRIDGE CITY CENTRE</b>											
Sainsbury's, Sidney Street	821	3,686	1,715	1,016	288	361	0	0	0	0	<b>7,886</b>
M&S, Sidney Street	404	921	1,366	281	863	361	0	0	0	273	<b>4,470</b>
Other, Cambridge Historic Centre	2,033	710	1,366	0	531	0	563	0	0	146	<b>5,349</b>
Little Waitrose, Fitzroy Street	1,225	0	349	1,016	288	0	0	0	180	0	<b>3,057</b>
<b>Total Cambridge City Centre</b>	<b>4,483</b>	<b>5,317</b>	<b>4,796</b>	<b>2,312</b>	<b>1,970</b>	<b>721</b>	<b>563</b>	<b>0</b>	<b>180</b>	<b>419</b>	<b>20,761</b>
<b>CAMBRIDGE DISTRICT &amp; LOCAL CENTRES</b>											
Local Stores, Mill Road East	11,391	0	0	0	0	0	0	184	0	0	<b>11,575</b>
Co-op, Chesterton Road, Mitchams Corner	0	0	1,742	5,174	0	0	0	0	0	0	<b>6,916</b>
Budgen's, Adkins Corner	5,252	605	1,018	281	288	0	0	0	0	146	<b>7,590</b>
Budgen's, Arbury Court	0	0	2,412	508	0	0	0	184	180	0	<b>3,283</b>
Co-op, Milton Road	0	0	349	3,878	0	0	0	0	0	0	<b>4,226</b>
Tesco Express, Cherry Hinton High Street	808	151	0	1,016	819	0	281	0	360	0	<b>3,435</b>
Tesco, Chesterton High Street	0	0	0	1,858	531	0	0	0	0	0	<b>2,389</b>
Co-op, Grantchester Street	0	3,402	349	0	0	0	281	0	0	0	<b>4,032</b>
Local Shops, Hills Road	404	967	349	0	288	0	0	0	0	0	<b>2,008</b>
Local Shops, Histon Road	1,225	408	22,735	1,577	1,062	361	1,386	3,164	702	0	<b>32,619</b>
<b>Total Cambridge District &amp; Local Centres</b>	<b>19,081</b>	<b>5,533</b>	<b>28,952</b>	<b>14,292</b>	<b>2,987</b>	<b>361</b>	<b>1,948</b>	<b>3,531</b>	<b>1,242</b>	<b>146</b>	<b>78,072</b>
<b>CAMBRIDGE OUT-OF-CENTRE</b>											
Asda, Beehive	15,144	257	2,035	5,469	1,592	0	563	993	1,934	546	<b>28,533</b>
M&S, Beehive	2,033	559	669	0	531	0	0	956	180	0	<b>4,928</b>
Sainsbury's, Colchams Lane	26,625	4,924	6,719	7,220	3,184	1,065	1,905	1,214	3,689	1,786	<b>58,331</b>
Tesco, Cheddars Lane	4,106	1,540	7,040	17,996	0	0	541	405	3,509	273	<b>35,410</b>
Waitrose, Trumpington	2,463	12,011	7,708	1,524	13,159	4,225	2,988	405	0	1,640	<b>46,124</b>
<b>Total Cambridge Out of Centre</b>	<b>50,371</b>	<b>19,291</b>	<b>24,170</b>	<b>32,209</b>	<b>18,467</b>	<b>5,290</b>	<b>5,998</b>	<b>3,973</b>	<b>9,312</b>	<b>4,245</b>	<b>173,326</b>
<b>OUTSIDE CITY BOUNDARY</b>											
Tesco Extra, Bar Hill	0	1,027	6,022	1,805	4,776	704	26,437	27,709	0	273	<b>68,754</b>
Tesco Extra, Royston	0	0	0	0	8,536	53,278	1,083	0	0	0	<b>62,897</b>
Tesco, Yarrow Road, Cherry Hinton	25,766	1,027	0	1,577	9,067	0	281	0	4,399	7,726	<b>49,844</b>
Tesco, Cambridge Road Industrial Estate, Milton	2,047	0	12,713	12,969	819	0	1,104	1,398	6,325	273	<b>37,648</b>
Morrisons, Cambourne	0	408	3,345	508	1,062	704	26,524	1,987	180	146	<b>34,863</b>
Tesco, Fordham Road, Newmarket	0	0	0	0	0	0	0	0	4,912	0	<b>4,912</b>
<b>Total Outside City Boundary</b>	<b>27,813</b>	<b>2,462</b>	<b>22,080</b>	<b>16,859</b>	<b>24,260</b>	<b>54,686</b>	<b>55,429</b>	<b>31,094</b>	<b>15,816</b>	<b>8,418</b>	<b>258,918</b>
Other	7,336	3,704	11,763	5,456	17,520	31,494	6,431	13,452	19,063	24,649	<b>140,867</b>
<b>Total</b>	<b>109,083</b>	<b>36,307</b>	<b>91,761</b>	<b>71,129</b>	<b>65,203</b>	<b>92,552</b>	<b>70,369</b>	<b>52,050</b>	<b>45,612</b>	<b>37,878</b>	<b>671,945</b>

Source: Tables 3 & 4

# Cambridge City Council

## Retail and Leisure Study 2013

**Table 10**  
**Existing Floorspace**

	Total Net Flsp (Note A) (sqm)	Net Conv Ratio (Note B) (%)	Net Convenience (sqm)	Co Average Sales (Note C) (\$ per sqm net)	Average Turnover 2012 (£000s)
<b>CAMBRIDGE CITY CENTRE</b>					
Sainsbury's, Sidney Street	1,326	95%	1,260	12,526	15,779
M&S, Sidney Street	1,171	95%	1,112	10,833	12,051
Local Stores, Cambridge Historic Centre	1,528	100%	1,528	4,000	6,111
Little Waitrose, Fitzroy Street	279	95%	265	11,320	3,000
<b>Total Cambridge City Centre</b>			<b>4,165</b>	<b>8,870</b>	<b>36,942</b>
<b>CAMBRIDGE DISTRICT &amp; LOCAL CENTRES</b>					
Local Stores, Mill Road East	2,126	95%	2,019	4,000	8,077
Co-op, Chesterton Road, Mitchams Corner	187	95%	178	7,530	1,338
Budgen's, Adkins Corner	514	95%	488	8,000	3,906
Budgen's, Arbury Court	789	95%	750	8,000	5,996
Co-op, Milton Road	250	95%	238	7,530	1,788
Tesco Express, Cherry Hinton High Street	202	100%	202	12,842	2,594
Tesco, Chesterton High Street	176	95%	167	12,842	2,147
Co-op, Grantchester Street	76	100%	76	7,530	572
Local Shops, Hills Road	397	95%	377	10,186	3,842
Local Shops, Histon Road	1,482	95%	1,408	7,113	10,014
<b>Total Cambridge District &amp; Local Centres</b>			<b>5,903</b>	<b>6,823</b>	<b>40,276</b>
<b>CAMBRIDGE OUT-OF-CENTRE</b>					
Asda, Beehive	3,790	70%	2,653	15,390	40,830
M&S, Beehive	1,081	90%	973	10,833	10,539
Sainsbury's, Coldhams Lane	4,265	70%	2,986	12,526	37,396
Tesco, Cheddars Lane	4,081	65%	2,653	12,842	34,065
Waitrose, Trumpington	2,976	90%	2,678	11,320	30,319
<b>Total Cambridge Out of Centre</b>			<b>11,942</b>	<b>12,824</b>	<b>153,150</b>
<b>TOTAL</b>			<b>22,010</b>	<b>10,467</b>	<b>230,367</b>

Note A: Floorspace figures derived from IGD / Experian Goad

Note B: Net Convenience ratio derived from Verdict Grocery Retailers 2010 / GVA assumptions

Note C: Company average turnover derived from Verdict Grocery Retailers 2010 / GVA assumptions

# Cambridge City Council

## Retail and Leisure Study 2013

**Table 11**  
**Convenience Floorspace Commitments**

	Total Net Floorspace (sqm)	Net Conv Ratio (%)	Net Convenience (sqm)	Benchmark Sales Density (£ per sqm net)	Average Turnover 2012 (£000s)	Average Turnover 2017 (£000s)	Average Turnover 2022 (£000s)	Average Turnover 2027 (£000s)	Average Turnover 2031 (£000s)
Extension to Sainsbury's, Coldhams Lane (Ref: 08/0543/FUL)	2,265	41%	929	12,526	11,632	11,632	11,749	11,867	11,962
New Co-op, Block M5, CB1 Station Area redevelopment	230	95%	219	7,530	1,646	1,646	1,663	1,679	1,693
Residual retail floorspace at CB1 Station Area redevelopment	741	100%	741	4,000	2,963	2,963	2,993	3,023	3,047
New Foodstore at North West Cambridge	2,000	95%	1,900	12,000	22,800	22,800	23,029	23,260	23,447
New Foodstore at NIAB site	2,000	95%	1,900	12,000	22,800	22,800	23,029	23,260	23,447
Local Centre at Clay Farm	325	100%	325	5,000	1,625	1,625	1,641	1,658	1,671
<b>Total</b>	<b>7,561</b>		<b>6,013</b>		<b>63,467</b>	<b>63,467</b>	<b>64,104</b>	<b>64,747</b>	<b>65,267</b>

Source: Cambridge City Council

# Cambridge City Council

## Retail and Leisure Study 2013

### Capacity Projections: Convenience Goods

**Table 12**  
**Future Shop Floorspace Capacity in Cambridge City (Baseline)**

	CONVENIENCE GOODS				
	2012	2017	2022	2027	2031
Catchment/Survey Area Residents Spending in <b>Cambridge City</b> (£000)	220,760	229,944	243,980	262,764	272,160
Existing Shop Floorspace (sqm net)	22,010	22,010	22,010	22,010	22,010
Sales per sqm net £	10,030	10,467	10,572	10,678	10,785
Sales from Existing Floorspace (£000)	220,760	230,367	232,680	235,016	237,376
Sales from Committed Floorspace (£000)	-	16,242	64,104	64,747	65,267
Residual Spending to Support new shops (£000)	-	-16,665	-52,805	-37,000	-30,483
Sales per sqm net in new shops (£) Based on large store format	-	12,000	12,120	12,242	12,365
<b>Capacity for new floorspace (sqm net)</b>	<b>-</b>	<b>-1,389</b>	<b>-4,357</b>	<b>-3,022</b>	<b>-2,465</b>

Assumes growth in sales efficiency of 0.2% pa post-2017 as per Experian Retail Planner 10.





Appendix 3  
Comparison  
Capacity  
Forecasts

# Cambridge City Council

## Retail and Leisure Study 2013

Table 1  
Survey Area Population Forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
<b>2012</b>	49,398	27,427	44,124	33,126	26,656	39,050	26,844	20,258	17,654	15,650	<b>300,187</b>
<b>2017</b>	51,352	27,949	45,488	34,389	27,644	40,874	29,010	21,544	18,806	16,274	<b>313,330</b>
<b>2022</b>	53,079	28,525	46,943	35,603	28,646	42,715	31,062	22,773	19,905	16,907	<b>326,158</b>
<b>2027</b>	55,278	29,307	48,708	37,129	29,572	44,411	32,819	23,851	20,879	17,491	<b>339,445</b>
<b>2031</b>	55,615	29,451	49,055	37,378	29,717	44,735	33,143	24,007	21,048	17,598	<b>341,747</b>

Source: Experian Micromarketer, October 2012 / Cambridge City Council

Postal Sectors	
Zone 1	CB 1 1/2/3/7/8/9
Zone 2	CB2 0/1/3/7/8/9, CB3 9
Zone 3	CB3 0, CB4 2/3, CB24 9
Zone 4	CB4 0/1, CB5 8, CB24 6
Zone 5	CB22 3/4/5/6/7, CB23 1
Zone 6	SG8 0/5/6/7/8/9
Zone 7	CB23 2/3/7/8/9/7/8
Zone 8	CB24 3/4/5/8
Zone 9	CB25 0/9
Zone 10	CB21 4/5/6

# Cambridge City Council Retail and Leisure Study 2013

## Comparison Goods Expenditure Forecasts

Table 2  
Per Capita Comparison Goods Expenditure (2010 Prices)

Growth in comparison goods spending per capita:										
2010-2011	0.6% pa									
2011-2012	1.4% pa									
2012-2017	2.6% pa									
2017-2031	2.9% pa									
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
<b>2010</b>	3,051	1,952	2,821	2,917	3,497	3,366	3,512	3,524	3,454	3,437
<b>2012</b>	3,112	1,991	2,878	2,976	3,567	3,434	3,583	3,595	3,523	3,506
<b>2012 Minus SFT at 9.9%</b>	<b>2,804</b>	<b>1,794</b>	<b>2,593</b>	<b>2,681</b>	<b>3,214</b>	<b>3,094</b>	<b>3,228</b>	<b>3,239</b>	<b>3,175</b>	<b>3,159</b>
<b>2017</b>	3,538	2,264	3,272	3,383	4,056	3,904	4,073	4,087	4,006	3,986
<b>2017 Minus SFT at 13.6%</b>	<b>3,057</b>	<b>1,956</b>	<b>2,827</b>	<b>2,923</b>	<b>3,504</b>	<b>3,373</b>	<b>3,519</b>	<b>3,531</b>	<b>3,461</b>	<b>3,444</b>
<b>2022</b>	4,082	2,612	3,774	3,903	4,679	4,504	4,699	4,715	4,621	4,599
<b>2022 Minus SFT at 16.0%</b>	<b>3,429</b>	<b>2,194</b>	<b>3,171</b>	<b>3,278</b>	<b>3,930</b>	<b>3,783</b>	<b>3,947</b>	<b>3,961</b>	<b>3,882</b>	<b>3,863</b>
<b>2027</b>	4,709	3,013	4,354	4,503	5,398	5,196	5,421	5,440	5,331	5,305
<b>2027 Minus SFT at 16.0%</b>	<b>3,956</b>	<b>2,531</b>	<b>3,658</b>	<b>3,782</b>	<b>4,534</b>	<b>4,364</b>	<b>4,554</b>	<b>4,569</b>	<b>4,478</b>	<b>4,456</b>
<b>2031</b>	5,280	3,378	4,882	5,048	6,052	5,825	6,078	6,099	5,977	5,948
<b>2031 Minus SFT at 16.1%</b>	<b>4,430</b>	<b>2,834</b>	<b>4,096</b>	<b>4,235</b>	<b>5,077</b>	<b>4,887</b>	<b>5,099</b>	<b>5,117</b>	<b>5,015</b>	<b>4,990</b>

Source: Experian Micromarketer, October 2012

Table 3  
Total Survey Area Comparison Goods Expenditure (2010 Prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
<b>2012</b>	138,520	49,206	114,403	88,811	85,674	120,808	86,649	65,613	56,044	49,437	<b>855,166</b>
<b>2017</b>	156,995	54,668	128,584	100,518	96,869	137,863	102,091	76,076	65,089	56,048	<b>974,800</b>
<b>2022</b>	182,009	62,580	148,834	116,722	112,587	161,593	122,606	90,196	77,270	65,309	<b>1,139,707</b>
<b>2027</b>	218,676	74,175	178,160	140,429	134,086	193,825	149,446	108,980	93,506	77,947	<b>1,369,229</b>
<b>2031</b>	246,368	83,471	200,924	158,309	150,884	218,629	169,004	122,838	105,557	87,818	<b>1,543,803</b>

Source: Tables 1 and 2

# Cambridge City Council Retail and Leisure Study 2013

## Comparison Goods Market Share

**Table 4**  
Comparison Goods Allocation - % Market Share

Zone Centre / Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)
Cambridge City Centre	64.0%	76.5%	62.0%	56.7%	58.9%	39.8%	55.9%	49.7%	50.8%	56.3%
Cambridge Retail Park	21.4%	9.0%	20.8%	22.0%	22.9%	8.6%	20.8%	18.1%	22.7%	17.7%
Retail Warehousing, Newmarket Road	2.3%	1.4%	1.5%	3.5%	1.6%	0.5%	2.0%	2.3%	1.9%	1.8%
Beehive Centre	3.6%	2.8%	3.4%	5.8%	3.5%	1.6%	3.5%	2.3%	2.2%	3.6%
<b>TOTAL CAMBRIDGE CITY</b>	<b>91.3%</b>	<b>89.7%</b>	<b>87.7%</b>	<b>87.9%</b>	<b>86.9%</b>	<b>50.4%</b>	<b>82.2%</b>	<b>72.4%</b>	<b>77.5%</b>	<b>79.4%</b>
Other	8.7%	10.3%	12.3%	12.1%	13.1%	49.6%	17.8%	27.6%	22.5%	20.6%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Cambridge City Telephone Survey, November 2012

## Cambridge City Council Retail and Leisure Study 2013

Table 5  
Comparison Goods Allocation 2012 - Spend (£) 2010 Prices

Zone Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	Zone 10 (£000)	TOTAL (£000)
Cambridge City Centre	88,600	37,652	70,893	50,312	50,496	48,042	48,409	32,602	28,493	27,814	483,312
Cambridge Retail Park	29,690	4,407	23,820	19,538	19,590	10,365	17,994	11,898	12,697	8,768	158,768
Retail Warehousing, Newmarket Road	3,136	680	1,756	3,098	1,361	601	1,768	1,514	1,038	877	15,829
Beehive Centre	5,008	1,391	3,887	5,150	3,020	1,882	3,022	1,519	1,213	1,792	27,884
<b>TOTAL CAMBRIDGE CITY</b>	<b>126,434</b>	<b>44,129</b>	<b>100,357</b>	<b>78,098</b>	<b>74,467</b>	<b>60,890</b>	<b>71,193</b>	<b>47,533</b>	<b>43,441</b>	<b>39,251</b>	<b>685,794</b>
Other	12,086	5,077	14,046	10,713	11,207	59,918	15,455	18,081	12,603	10,186	169,372
<b>Total Survey Area</b>	<b>138,520</b>	<b>49,206</b>	<b>114,403</b>	<b>88,811</b>	<b>85,674</b>	<b>120,808</b>	<b>86,649</b>	<b>65,613</b>	<b>56,044</b>	<b>49,437</b>	<b>855,166</b>

Source: Tables 3 & 4

## Cambridge City Council Retail and Leisure Study 2013

Table 6  
Comparison Goods Allocation 2017 - Spend (£) 2010 Prices

Zone Centre / Store	Zone 1 (\$000)	Zone 2 (\$000)	Zone 3 (\$000)	Zone 4 (\$000)	Zone 5 (\$000)	Zone 6 (\$000)	Zone 7 (\$000)	Zone 8 (\$000)	Zone 9 (\$000)	Zone 10 (\$000)	TOTAL (\$000)
Cambridge City Centre	100,417	41,831	79,680	56,944	57,094	54,824	57,037	37,801	33,091	31,533	550,252
Cambridge Retail Park	33,650	4,897	26,773	22,113	22,149	11,829	21,201	13,796	14,746	9,941	181,094
Retail Warehousing, Newmarket Road	3,555	755	1,974	3,507	1,539	686	2,083	1,755	1,206	995	18,053
Beehive Centre	5,676	1,545	4,369	5,829	3,415	2,148	3,561	1,761	1,409	2,031	31,743
<b>TOTAL CAMBRIDGE CITY</b>	<b>143,297</b>	<b>49,027</b>	<b>112,796</b>	<b>88,393</b>	<b>84,197</b>	<b>69,486</b>	<b>83,882</b>	<b>55,112</b>	<b>50,452</b>	<b>44,500</b>	<b>781,142</b>
Other	13,698	5,640	15,787	12,125	12,672	68,377	18,210	20,964	14,637	11,548	193,658
<b>Total Survey Area</b>	<b>156,995</b>	<b>54,668</b>	<b>128,584</b>	<b>100,518</b>	<b>96,869</b>	<b>137,863</b>	<b>102,091</b>	<b>76,076</b>	<b>65,089</b>	<b>56,048</b>	<b>974,800</b>

Source: Tables 3 & 4

## Cambridge City Council Retail and Leisure Study 2013

Table 7  
Comparison Goods Allocation 2022 - Spend (£) 2010 Prices

Zone Centre / Store	Zone 1 (\$000)	Zone 2 (\$000)	Zone 3 (\$000)	Zone 4 (\$000)	Zone 5 (\$000)	Zone 6 (\$000)	Zone 7 (\$000)	Zone 8 (\$000)	Zone 9 (\$000)	Zone 10 (\$000)	TOTAL (\$000)
Cambridge City Centre	116,416	47,885	92,229	66,124	66,358	64,261	68,498	44,817	39,284	36,744	642,616
Cambridge Retail Park	39,011	5,605	30,989	25,678	25,744	13,865	25,462	16,356	17,505	11,583	211,799
Retail Warehousing, Newmarket Road	4,121	864	2,285	4,072	1,789	804	2,501	2,081	1,432	1,159	21,107
Beehive Centre	6,580	1,768	5,057	6,769	3,969	2,518	4,277	2,087	1,672	2,367	37,064
<b>TOTAL CAMBRIDGE CITY</b>	<b>166,129</b>	<b>56,123</b>	<b>130,560</b>	<b>102,642</b>	<b>97,859</b>	<b>81,447</b>	<b>100,737</b>	<b>65,341</b>	<b>59,894</b>	<b>51,853</b>	<b>912,586</b>
Other	15,880	6,457	18,274	14,079	14,728	80,147	21,869	24,855	17,376	13,456	227,121
<b>Total Survey Area</b>	<b>182,009</b>	<b>62,580</b>	<b>148,834</b>	<b>116,722</b>	<b>112,587</b>	<b>161,593</b>	<b>122,606</b>	<b>90,196</b>	<b>77,270</b>	<b>65,309</b>	<b>1,139,707</b>

Source: Tables 3 & 4

## Cambridge City Council Retail and Leisure Study 2013

Table 8  
Comparison Goods Allocation 2027 - Spend (£) 2010 Prices

Zone Centre / Store	Zone 1 (\$000)	Zone 2 (\$000)	Zone 3 (\$000)	Zone 4 (\$000)	Zone 5 (\$000)	Zone 6 (\$000)	Zone 7 (\$000)	Zone 8 (\$000)	Zone 9 (\$000)	Zone 10 (\$000)	TOTAL (\$000)
Cambridge City Centre	139,868	56,757	110,401	79,554	79,029	77,078	83,493	54,150	47,538	43,854	771,725
Cambridge Retail Park	46,870	6,644	37,095	30,893	30,659	16,630	31,035	19,763	21,183	13,825	254,599
Retail Warehousing, Newmarket Road	4,951	1,024	2,735	4,899	2,130	964	3,049	2,514	1,733	1,383	25,383
Beehive Centre	7,906	2,096	6,053	8,144	4,727	3,020	5,213	2,522	2,024	2,825	44,529
<b>TOTAL CAMBRIDGE CITY</b>	<b>199,596</b>	<b>66,522</b>	<b>156,285</b>	<b>123,490</b>	<b>116,545</b>	<b>97,692</b>	<b>122,790</b>	<b>78,949</b>	<b>72,478</b>	<b>61,887</b>	<b>1,096,235</b>
Other	19,080	7,653	21,874	16,939	17,540	96,133	26,656	30,031	21,027	16,060	272,994
<b>Total Survey Area</b>	<b>218,676</b>	<b>74,175</b>	<b>178,160</b>	<b>140,429</b>	<b>134,086</b>	<b>193,825</b>	<b>149,446</b>	<b>108,980</b>	<b>93,506</b>	<b>77,947</b>	<b>1,369,229</b>

Source: Tables 3 & 4



## Cambridge City Council Retail and Leisure Study 2013

Table 9  
Comparison Goods Allocation 2031 - Spend (£) 2010 Prices

Zone Centre / Store	Zone 1 (\$000)	Zone 2 (\$000)	Zone 3 (\$000)	Zone 4 (\$000)	Zone 5 (\$000)	Zone 6 (\$000)	Zone 7 (\$000)	Zone 8 (\$000)	Zone 9 (\$000)	Zone 10 (\$000)	TOTAL (\$000)
Cambridge City Centre	157,581	63,870	124,508	89,683	88,930	86,942	94,420	61,036	53,665	49,408	870,044
Cambridge Retail Park	52,806	7,476	41,835	34,827	34,500	18,758	35,097	22,276	23,914	15,576	287,065
Retail Warehousing, Newmarket Road	5,578	1,153	3,085	5,523	2,397	1,087	3,448	2,834	1,956	1,558	28,619
Beehive Centre	8,907	2,359	6,827	9,181	5,319	3,406	5,895	2,843	2,285	3,183	50,204
<b>TOTAL CAMBRIDGE CITY</b>	<b>224,872</b>	<b>74,858</b>	<b>176,255</b>	<b>139,213</b>	<b>131,146</b>	<b>110,194</b>	<b>138,859</b>	<b>88,988</b>	<b>81,820</b>	<b>69,724</b>	<b>1,235,931</b>
Other	21,496	8,612	24,669	19,096	19,738	108,435	30,145	33,850	23,737	18,094	307,872
<b>Total Survey Area</b>	<b>246,368</b>	<b>83,471</b>	<b>200,924</b>	<b>158,309</b>	<b>150,884</b>	<b>218,629</b>	<b>169,004</b>	<b>122,838</b>	<b>105,557</b>	<b>87,818</b>	<b>1,543,803</b>

Source: Tables 3 & 4

# Cambridge City Council

## Retail and Leisure Study 2013

Table 10: Existing Comparison Goods Floorspace (In-Centre)

	Net Floorspace (sqm)
Cambridge City Centre	87,677

Table 10A: Existing Comparison Goods Floorspace (Out-of-Centre)

	Net Floorspace (sqm)	Sales Density (£ per sqm)	Benchmark Turnover (£000)
<b>Beehive Centre</b>			
Multyork	453	£2,119	£961
Next Home	796	£4,848	£3,857
Oak Furniture Land	751	£1,489	£1,119
Maplin	308	£3,000	£925
B&M Homestore	2,287	£3,364	£7,693
Homesense	792	£1,489	£1,180
DW Sports	1,558	£1,705	£2,656
Carpetright	557	£1,104	£615
Dreams	558	£1,489	£831
Hobbeycraft	544	£2,583	£1,404
Pets at Home	919	£2,731	£2,511
TK Maxx	1,632	£2,947	£4,810
Toys R Us	1,192	£2,329	£2,776
Asda (Comparison Goods)	1,137	£6,997	£7,956
M&S Simply Food (Comparison Goods)	108	£6,723	£726
<b>Sub Total</b>	<b>13,593</b>	<b>£2,944</b>	<b>£40,019</b>
<b>Cambridge Retail Park</b>			
Homebase	4,527	£1,264	£5,722
ScS	605	£2,119	£1,282
Dunelm Mill	2,870	£2,362	£6,779
Harveys	1,147	£1,489	£1,708
Furniture Village	741	£2,119	£1,570
Halfords	734	£2,942	£2,159
Burton/Evans/Dorothy Perkins	734	£4,848	£3,557
Sports Direct	739	£4,404	£3,254
Argos	788	£21,910	£17,267
Currys/PC World	3,311	£6,667	£22,078
Boots	789	£9,442	£7,450
<b>Sub Total</b>	<b>16,984</b>	<b>£4,288</b>	<b>£72,824</b>
<b>Retail Warehousing, Newmarket Road</b>			
B&Q	3,714	£1,866	£6,930
DFS	1,486	£6,664	£9,905
Comet	1,886	£6,631	£12,504
Staples	764	£1,477	£1,129
<b>Sub Total</b>	<b>7,850</b>	<b>£3,881</b>	<b>£30,469</b>
<b>Total Out-of-Centre Floorspace</b>	<b>38,428</b>	<b>£3,729</b>	<b>£143,312</b>

<b>Total Floorspace (In and Out-of-Centre)</b>	<b>126,105</b>	-	
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Source: Experian Goad / Trevor Woods Database / Mintel / GVA

## Cambridge City Council Retail and Leisure Study 2013

Table 11: Comparison Goods Commitments

	Net Comparison Floorspace (sqm)	Benchmark Sales Density (£/sqm net)	Average Turnover 2012 (£000)	Average Turnover 2017 (£000)	Average Turnover 2022 (£000)	Average Turnover 2027 (£000)	Average Turnover 2031 (£000)
New Retail Unit (1A) at Beehive Centre (Ref: 11/0984/FUL)	695	5,000	3,475	3,818	4,195	4,586	4,925
Extension to Sainsbury's, Coldhams Lane (Ref: 08/0543/FUL)	1,336	5,249	7,013	7,705	8,465	9,255	9,939
<b>Total</b>	<b>2,031</b>		<b>10,488</b>	<b>11,523</b>	<b>12,660</b>	<b>13,841</b>	<b>14,865</b>

Source: Cambridge City Council

# Cambridge City Council Retail and Leisure Study 2013

## Capacity Projections: Comparison Goods

Table 12

GLOBAL Comparison Goods Floorspace Capacity - BASLINE

	COMPARISON GOODS				
	2012	2017	2022	2027	2031
Total Available Expenditure (£000)	855,166	974,800	1,139,707	1,369,229	1,543,803
Market Share from Survey Area	80	80	80	80	80
Survey Area Residents Spending (£000)	685,794	781,142	912,586	1,096,235	1,235,931
Inflow to Cambridge (36%) from beyond survey area (£000)	173,992	198,091	231,342	277,821	313,216
<b>Total Cambridge City Comparison Goods Turnover (£000)</b>	<b>859,786</b>	<b>979,233</b>	<b>1,143,928</b>	<b>1,374,056</b>	<b>1,549,146</b>
Existing Retail Floorspace (sqm net)	126,105	126,105	126,105	126,105	126,105
Sales per sqm net (£)	6,818	7,491	8,230	8,998	9,663
Sales from Existing Floorspace (£000)	859,786	944,629	1,037,844	1,134,674	1,218,603
Sales from Commitments (£000)	0	11,523	12,660	13,841	14,865
Residual Spending to support new floorspace (£000)	0	23,081	93,424	225,541	315,679
Sales per sqm net in new shops (£)	5,500	6,043	6,607	7,223	7,897
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>3,820</b>	<b>14,141</b>	<b>31,226</b>	<b>39,976</b>

Assumes growth in sales efficiency: 1.9% pa 2012-2022 and 1.8% pa 2022-2031

% inflow derived from 2008 in-centre survey results

# Cambridge City Council Retail and Leisure Study 2013

## Capacity Projections: Comparison Goods

Table 13  
GLOBAL Comparison Goods Floorspace Capacity - DEVELOPMENT SCENARIO

	COMPARISON GOODS				
	2012	2017	2022	2027	2031
Total Available Expenditure (£000)	855,166	974,800	1,139,707	1,369,229	1,543,803
Market Share from Survey Area	80	80	80	80	80
Survey Area Residents Spending (£000)	685,794	781,142	912,586	1,096,235	1,235,931
Inflow to Cambridge (36%) from beyond survey area (£000)	173,992	198,091	231,342	277,821	313,216
<b>Total Cambridge City Comparison Goods Turnover (£000)</b>	<b>859,786</b>	<b>979,233</b>	<b>1,143,928</b>	<b>1,374,056</b>	<b>1,549,146</b>
Existing Retail Floorspace (sqm net)	126,105	126,105	126,105	126,105	126,105
Sales per sqm net (£)	6,818	7,491	8,230	8,998	9,663
Sales from Existing Floorspace (£000)	859,786	944,629	1,037,844	1,134,674	1,218,603
Sales from Commitments (£000)	0	11,523	12,660	13,841	14,865
Claw Back to Competing Centres	0	40,333	46,730	56,147	65,482
Potential trade diversion to new town centre at Northstowe	0	0	58,795	70,893	79,917
Residual Spending to support new floorspace (£000)	0	-17,252	-12,101	98,501	170,280
Sales per sqm net in new shops (£)	5,500	6,043	6,607	7,223	7,897
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>-2,855</b>	<b>-1,832</b>	<b>13,637</b>	<b>21,563</b>

Assumes growth in sales efficiency: 1.9% pa 2012-2022 and 1.8% pa 2022-2031  
% inflow derived from 2008 in-centre survey results

# Cambridge City Council Retail and Leisure Study 2013

## Capacity Projections: Comparison Goods

Table 14  
GLOBAL Comparison Goods Floorspace Capacity - INCREASED SFT

	COMPARISON GOODS				
	2012	2017	2022	2027	2031
Total Available Expenditure (£000)	855,166	974,800	1,085,435	1,304,028	1,472,041
Market Share from Survey Area	80	80	80	80	80
Survey Area Residents Spending (£000)	685,794	781,142	869,129	1,044,033	1,178,480
Inflow to Cambridge (36%) from beyond survey area (£000)	173,992	198,091	220,325	264,591	298,656
<b>Total Cambridge City Comparison Goods Turnover (£000)</b>	<b>859,786</b>	<b>979,233</b>	<b>1,089,455</b>	<b>1,308,625</b>	<b>1,477,136</b>
Existing Retail Floorspace (sqm net)	126,105	126,105	126,105	126,105	126,105
Sales per sqm net (£)	6,818	7,491	8,230	8,998	9,663
Sales from Existing Floorspace (£000)	859,786	944,629	1,037,844	1,134,674	1,218,603
Sales from Commitments (£000)	0	11,523	12,660	13,841	14,865
Claw Back to Competing Centres	0	40,333	46,730	56,147	65,482
Potential trade diversion to new town centre at Northstowe	0	0	58,795	70,893	79,917
Residual Spending to support new floorspace (£000)	0	-17,252	-66,573	33,070	98,270
Sales per sqm net in new shops (£)	5,500	6,043	6,607	7,223	7,897
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>-2,855</b>	<b>-10,077</b>	<b>4,579</b>	<b>12,444</b>

Assumes growth in sales efficiency: 1.9% pa 2012-2022 and 1.8% pa 2022-2031

% inflow derived from 2008 in-centre survey results

Allowance for SFT increased to 20% of total available spend at 2022-2031



Appendix 4  
Leisure  
Expenditure  
Forecasts

# Cambridge City Council

## Retail and Leisure Study 2013

Table 1  
Survey Area Population Forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
<b>2012</b>	49,398	27,427	44,124	33,126	26,656	39,050	26,844	20,258	17,654	15,650	<b>300,187</b>
<b>2017</b>	51,352	27,949	45,488	34,389	27,644	40,874	29,010	21,544	18,806	16,274	<b>313,330</b>
<b>2022</b>	53,079	28,525	46,943	35,603	28,646	42,715	31,062	22,773	19,905	16,907	<b>326,158</b>
<b>2027</b>	55,278	29,307	48,708	37,129	29,572	44,411	32,819	23,851	20,879	17,491	<b>339,445</b>
<b>2031</b>	55,615	29,451	49,055	37,378	29,717	44,735	33,143	24,007	21,048	17,598	<b>341,747</b>

Source: Experian Micromarketer, October 2012



# Cambridge City Council Retail and Leisure Study 2013

## All Leisure Expenditure Forecasts

Table 2

### Per Capita Leisure Expenditure (2010 Prices)

Growth in leisure spending per capita:											
2010-2011 0.7% pa											
2011-2012 -0.5% pa											
2012-2017 1.6% pa											
2017-2022 1.8% pa											
2022-2031 1.7% pa											
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Survey Area
<b>2010</b>	1,963	1,331	1,719	1,818	2,013	1,909	1,988	2,000	1,917	1,960	<b>1,852</b>
<b>2012</b>	1,967	1,334	1,722	1,822	2,017	1,913	1,992	2,004	1,921	1,964	<b>1,856</b>
<b>2017</b>	2,129	1,444	1,865	1,972	2,184	2,071	2,156	2,169	2,079	2,126	<b>2,009</b>
<b>2022</b>	2,328	1,578	2,039	2,156	2,387	2,264	2,358	2,372	2,273	2,324	<b>2,196</b>
<b>2027</b>	2,533	1,717	2,218	2,346	2,597	2,463	2,565	2,580	2,473	2,529	<b>2,389</b>
<b>2031</b>	2,709	1,837	2,373	2,509	2,778	2,635	2,744	2,760	2,646	2,705	<b>2,556</b>

Source: Experian Micromarketer, October 2012

Table 3

### Total Survey Area Leisure Expenditure (2010 Prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
<b>2012</b>	97,159	36,577	75,998	60,341	53,764	74,693	53,471	40,596	33,909	30,734	<b>557,242</b>
<b>2017</b>	109,345	40,352	84,819	67,816	60,362	84,640	62,558	46,739	39,106	34,600	<b>630,337</b>
<b>2022</b>	123,567	45,026	95,699	76,761	68,386	96,704	73,233	54,014	45,253	39,299	<b>717,943</b>
<b>2027</b>	140,003	50,329	108,029	87,091	76,805	109,386	84,180	61,546	51,641	44,232	<b>813,241</b>
<b>2031</b>	150,682	54,104	116,387	93,791	82,564	117,869	90,941	66,271	55,691	47,606	<b>875,905</b>

Source: Tables 1 and 2

# Cambridge City Council Retail and Leisure Study 2013

## Café and Restaurant Expenditure Forecasts

Table 4

Per Capita Café and Restaurant Expenditure (2010 Prices)

Growth in leisure spending per capita:											
2010-2011	0.7% pa										
2011-2012	-0.5% pa										
2012-2017	1.6% pa										
2017-2022	1.8% pa										
2022-2031	1.7% pa										
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Survey Area
<b>2010</b>	1,198	825	1,030	1,101	1,149	1,087	1,134	1,133	1,086	1,112	<b>1,088</b>
<b>2012</b>	1,200	827	1,032	1,103	1,151	1,089	1,136	1,135	1,088	1,114	<b>1,090</b>
<b>2017</b>	1,300	895	1,117	1,194	1,246	1,179	1,230	1,229	1,178	1,206	<b>1,180</b>
<b>2022</b>	1,421	978	1,222	1,306	1,363	1,289	1,345	1,344	1,288	1,319	<b>1,290</b>
<b>2027</b>	1,546	1,064	1,329	1,421	1,482	1,402	1,463	1,462	1,401	1,435	<b>1,404</b>
<b>2031</b>	1,654	1,139	1,422	1,520	1,586	1,500	1,565	1,564	1,499	1,535	<b>1,502</b>

Source: Experian Micromarketer, October 2012

Table 5

Total Survey Area Café and Restaurant Expenditure (2010 Prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
<b>2012</b>	59,295	22,672	45,537	36,543	30,688	42,531	30,501	22,997	19,210	17,437	<b>327,411</b>
<b>2017</b>	66,732	25,012	50,822	41,070	34,454	48,195	35,685	26,478	22,154	19,630	<b>370,231</b>
<b>2022</b>	75,412	27,909	57,341	46,487	39,034	55,064	41,774	30,599	25,636	22,296	<b>421,553</b>
<b>2027</b>	85,442	31,195	64,730	52,743	43,839	62,285	48,018	34,866	29,255	25,095	<b>477,469</b>
<b>2031</b>	91,960	33,536	69,737	56,801	47,127	67,115	51,875	37,543	31,550	27,009	<b>514,251</b>

Source: Tables 1 and 4

# Cambridge City Council Retail and Leisure Study 2013

## Games of Chance Expenditure Forecasts

Table 6

### Per Capita Games of Chance Expenditure (2010 Prices)

Growth in leisure spending per capita:											
2010-2011 0.7% pa											
2011-2012 -0.5% pa											
2012-2017 1.6% pa											
2017-2022 1.8% pa											
2022-2031 1.7% pa											
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Survey Area
<b>2010</b>	97	51	96	96	112	112	104	112	113	110	<b>99</b>
<b>2012</b>	97	51	96	96	112	112	104	112	113	110	<b>99</b>
<b>2017</b>	105	55	104	104	121	121	113	121	123	119	<b>107</b>
<b>2022</b>	115	60	114	114	133	133	123	133	134	130	<b>117</b>
<b>2027</b>	125	66	124	124	145	145	134	145	146	142	<b>128</b>
<b>2031</b>	134	70	133	133	155	155	144	155	156	152	<b>137</b>

Source: Experian Micromarketer, October 2012

Table 7

### Total Survey Area Games of Chance Expenditure (2010 Prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
<b>2012</b>	4,801	1,402	4,244	3,186	2,991	4,382	2,797	2,273	1,999	1,725	<b>29,801</b>
<b>2017</b>	5,403	1,546	4,737	3,581	3,358	4,966	3,273	2,617	2,305	1,942	<b>33,728</b>
<b>2022</b>	6,106	1,725	5,344	4,053	3,805	5,674	3,831	3,025	2,667	2,206	<b>38,436</b>
<b>2027</b>	6,918	1,928	6,033	4,599	4,273	6,418	4,404	3,447	3,044	2,482	<b>43,546</b>
<b>2031</b>	7,446	2,073	6,500	4,953	4,594	6,915	4,757	3,711	3,283	2,672	<b>46,904</b>

Source: Tables 1 and 6

# Cambridge City Council

## Retail and Leisure Study 2013

### Hairdressing Salons and Personal Grooming Expenditure Forecasts

Table 8

Per Capita Hairdressing Salons and Personal Grooming Expenditure (2010 Prices)

Growth in leisure spending per capita:											
2010-2011 0.7% pa											
2011-2012 -0.5% pa											
2012-2017 1.6% pa											
2017-2022 1.8% pa											
2022-2031 1.7% pa											
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Survey Area
<b>2010</b>	87	53	75	79	101	98	97	98	99	102	<b>87</b>
<b>2012</b>	87	53	75	79	101	98	97	98	99	102	<b>87</b>
<b>2017</b>	94	57	81	86	110	106	105	106	107	111	<b>94</b>
<b>2022</b>	103	63	89	94	120	116	115	116	117	121	<b>103</b>
<b>2027</b>	112	68	97	102	130	126	125	126	128	132	<b>112</b>
<b>2031</b>	120	73	104	109	139	135	134	135	137	141	<b>120</b>

Source: Experian Micromarketer, October 2012

Table 9

Total Survey Area Hairdressing Salons and Personal Grooming Expenditure (2010 Prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
<b>2012</b>	4,306	1,456	3,316	2,622	2,698	3,834	2,609	1,989	1,751	1,599	<b>26,181</b>
<b>2017</b>	4,846	1,607	3,701	2,947	3,029	4,345	3,052	2,290	2,020	1,801	<b>29,637</b>
<b>2022</b>	5,476	1,793	4,175	3,336	3,431	4,964	3,573	2,647	2,337	2,045	<b>33,778</b>
<b>2027</b>	6,205	2,004	4,713	3,784	3,854	5,615	4,107	3,016	2,667	2,302	<b>38,268</b>
<b>2031</b>	6,678	2,154	5,078	4,076	4,143	6,051	4,437	3,247	2,876	2,477	<b>41,218</b>

Source: Tables 1 and 8

# Cambridge City Council Retail and Leisure Study 2013

## Accommodation Services Expenditure Forecasts

Table 10

### Per Capita Accommodation Services Expenditure (2010 Prices)

Growth in leisure spending per capita:											
2010-2011 0.7% pa											
2011-2012 -0.5% pa											
2012-2017 1.6% pa											
2017-2022 1.8% pa											
2022-2031 1.7% pa											
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Survey Area
<b>2010</b>	130	103	116	118	167	148	152	158	151	163	<b>136</b>
<b>2012</b>	130	103	116	118	167	148	152	158	151	163	<b>136</b>
<b>2017</b>	141	112	126	128	181	161	165	171	164	177	<b>148</b>
<b>2022</b>	154	122	138	140	198	176	180	187	179	193	<b>161</b>
<b>2027</b>	168	133	150	152	215	191	196	204	195	210	<b>175</b>
<b>2031</b>	179	142	160	163	230	204	210	218	208	225	<b>188</b>

Source: Experian Micromarketer, October 2012

Table 11

### Total Survey Area Accommodation Services Expenditure (2010 Prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
<b>2012</b>	6,434	2,831	5,128	3,917	4,460	5,791	4,088	3,207	2,671	2,556	<b>41,083</b>
<b>2017</b>	7,241	3,123	5,724	4,402	5,008	6,562	4,783	3,692	3,080	2,877	<b>46,492</b>
<b>2022</b>	8,183	3,484	6,458	4,982	5,673	7,497	5,599	4,267	3,565	3,268	<b>52,978</b>
<b>2027</b>	9,272	3,895	7,290	5,653	6,372	8,480	6,436	4,862	4,068	3,678	<b>60,006</b>
<b>2031</b>	9,979	4,187	7,854	6,088	6,850	9,138	6,953	5,235	4,387	3,959	<b>64,629</b>

Source: Tables 1 and 10

# Cambridge City Council Retail and Leisure Study 2013

## Recreational and Sporting Services Expenditure Forecasts

Table 12

### Per Capita Recreational and Sporting Services Expenditure (2010 Prices)

Growth in leisure spending per capita:											
2010-2011 0.7% pa											
2011-2012 -0.5% pa											
2012-2017 1.6% pa											
2017-2022 1.8% pa											
2022-2031 1.7% pa											
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Survey Area
<b>2010</b>	148	101	127	135	158	149	165	162	152	157	<b>143</b>
<b>2012</b>	148	101	127	135	158	149	165	162	152	157	<b>143</b>
<b>2017</b>	161	110	138	146	171	162	179	176	165	170	<b>155</b>
<b>2022</b>	176	120	151	160	187	177	196	192	180	186	<b>170</b>
<b>2027</b>	191	130	164	174	204	192	213	209	196	203	<b>185</b>
<b>2031</b>	204	139	175	186	218	206	228	224	210	217	<b>197</b>

Source: Experian Micromarketer, October 2012

Table 13

### Total Survey Area Recreational and Sporting Services Expenditure (2010 Prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
<b>2012</b>	7,325	2,776	5,615	4,481	4,220	5,830	4,438	3,288	2,689	2,462	<b>43,123</b>
<b>2017</b>	8,244	3,062	6,266	5,036	4,738	6,606	5,192	3,786	3,101	2,772	<b>48,803</b>
<b>2022</b>	9,316	3,417	7,070	5,700	5,368	7,548	6,078	4,375	3,588	3,148	<b>55,608</b>
<b>2027</b>	10,555	3,819	7,981	6,467	6,028	8,538	6,987	4,985	4,095	3,543	<b>62,999</b>
<b>2031</b>	11,361	4,106	8,599	6,965	6,480	9,200	7,548	5,368	4,416	3,813	<b>67,855</b>

Source: Tables 1 and 12

# Cambridge City Council Retail and Leisure Study 2013

## Cultural Services Expenditure Forecasts

Table 14

### Per Capita Cultural Services Expenditure (2010 Prices)

Growth in leisure spending per capita:											
2010-2011 0.7% pa											
2011-2012 -0.5% pa											
2012-2017 1.6% pa											
2017-2022 1.8% pa											
2022-2031 1.7% pa											
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Survey Area
<b>2010</b>	304	198	274	289	326	316	336	337	317	316	<b>298</b>
<b>2012</b>	305	198	275	290	327	317	337	338	318	317	<b>299</b>
<b>2017</b>	330	215	297	313	354	343	364	366	344	343	<b>323</b>
<b>2022</b>	361	235	325	343	387	375	398	400	376	375	<b>353</b>
<b>2027</b>	392	255	354	373	421	408	434	435	409	408	<b>384</b>
<b>2031</b>	420	273	378	399	450	436	464	465	438	436	<b>411</b>

Source: Experian Micromarketer, October 2012

Table 15

### Total Survey Area Cultural Services Expenditure (2010 Prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
<b>2012</b>	15,047	5,441	12,114	9,592	8,707	12,364	9,037	6,840	5,607	4,955	<b>89,705</b>
<b>2017</b>	16,934	6,003	13,520	10,780	9,776	14,011	10,573	7,875	6,467	5,578	<b>101,516</b>
<b>2022</b>	19,136	6,698	15,254	12,202	11,075	16,008	12,377	9,101	7,483	6,336	<b>115,671</b>
<b>2027</b>	21,682	7,487	17,219	13,844	12,438	18,107	14,228	10,371	8,540	7,131	<b>131,046</b>
<b>2031</b>	23,335	8,049	18,551	14,910	13,371	19,511	15,370	11,167	9,209	7,675	<b>141,148</b>

Source: Tables 1 and 14