

**CAMBRIDGE CITY COUNCIL AND SOUTH
CAMBRIDGESHIRE DISTRICT COUNCIL: CAMBRIDGE SUB
REGION RETAIL STUDY (October 2008)**

AMENDMENTS: AUGUST 2009

- 1.1 Since the publication of the Cambridge Sub Region Retail Study in October 2008, it has become apparent that there are a number of technical discrepancies. This note explains the changes that have been made in the report re-issued to the Councils in August 2009.
- 1.2 Since the publication of the Retail Study, it was noted that there was an error with the labelling of Zones 1 and 2, and that Zone 1 is in fact Zone 2 and vice versa. An amended survey area plan has been provided.
- 1.3 Research and Marketing who undertook the telephone surveys have confirmed that the correct postcode sectors for Zones 1 and 2 are:-
- Zone 1 - CB3 0, CB4 0/1/2/3/6/9, CB5 8
 - Zone 2 - CB1 1/2/3/7/8/9, CB2 1/2/3, CB3 9
- 1.4 It was therefore found that that the expenditure per capita figures for both convenience and comparison goods had been incorrectly applied to the market shares in Zones 1 and 2. For example, the market shares for Zone 1 were being applied to the expenditure for Zone 2 and vice versa. This has implications for the capacity forecasts and the turnover estimates of each store and revised modelling tables have been re-issued to the Councils.
- 1.5 In addition, it was found that some of the composite market shares for 'main' and 'top-up' food shopping in Zone 3 were incorrect. For example, the original study showed that Sainsbury's in Coldham Lane had a market share of 0%. In fact for 'main' food shopping trips, Sainsbury's has a market share of 8.2% and a market share of 4.8% for 'top-up', which gives a composite market share of 7.4% using a 75%/25% 'main' to 'top-up' weighting. This has been corrected and it has increased the market share of various foodstores and has affected their turnover and subsequent capacity forecasts.
- 1.6 The following tables set out the revised baseline capacity forecasts for convenience and comparison goods across the sub-region. The original capacity forecasts are given in brackets.

Table 1: Baseline Capacity Forecasts for Convenience Goods (sqm net)

Local Authority	2008-2011 (sqm net)	2008-2016 (sqm net)	2008-2021 (sqm net)
Cambridge City	2,813 (2,172)	5,641 (4,485)	7,075 (5,882)
South Cambridgeshire	2,758 (1,958)	4,625 (3,873)	6,315 (5,335)
Total Cambridge Sub Region	5,570 (4,130)	10,265 (8,359)	13,390 (11,216)

Source: GVA Capacity Modelling, Tables 18, 19 and 20 Appendix 5.

Table 2: Baseline Capacity Forecasts for Comparison Goods (sqm net)

Local Authority	2008-2011 (sqm net)	2008-2016 (sqm net)	2008-2021 (sqm net)
Cambridge City	13,847 (13,859)	45,464 (45,527)	82,790 (82,828)
South Cambridgeshire	149 (163)	562 (636)	1,060 (1,104)
Total Cambridge Sub Region	13,977 (14,022)	46,026 (46,163)	83,850 (83,932)

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

Table 3: Global Capacity Forecasts for Convenience Goods with Pipeline Schemes (sqm net)

	2008-2011 (sqm net)	2008-2016 (sqm net)	2008-2021 (sqm net)
Cambridge Sub Region	4,913 (3,473)	4,244 (2,338)	1,272 (-902)

Source: GVA Capacity Modelling, Table 21, Appendix 5.

Table 4: Capacity Forecasts for Comparison Goods with Pipeline Schemes (sqm net)

	2008-2011 (sqm net)	2008-2016 (sqm net)	2008-2021 (sqm net)
Cambridge Sub Region	12,647 (12,673)	44,186 (44,323)	61,859 (61,941)

Source: GVA Capacity Modelling, Table 16, Appendix 6.

Table 5: Capacity Forecasts for Comparison Goods with Changes to Competing Centre Market Shares (sqm net)

	2008-2011 (sqm net)	2008-2016 (sqm net)	2008-2021 (sqm net)
Cambridge Sub Region (baseline)	10,194 (10,220)	33,023 (33,160)	67,919 (68,001)
Cambridge Sub Region (with pipeline schemes)	8,844 (8,870)	31,183 (31,319)	45,928 (46,010)

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

- 1.7 We have reviewed the conclusions of the original retail study in light of the revised capacity forecasts and we consider that our findings remain relevant.
- 1.8 The following documents have been re-issued to the Councils, as well as an amended version of the final report including plans and appendices:-
- Main Report;
 - Plan 2 – Study Area and Household Telephone Survey Zones;
 - Plan 3 – Comparison Expenditure Flows to Competing Centres;
 - Plan 4 – Cambridge Comparison Goods Market Share;
 - Plan 5 – Peterborough Comparison Goods Market Share;
 - Plan 6 – Bury Comparison Goods Market Share;
 - Plan 7 – Stevenage Comparison Goods Market Share;
 - Plan 8 – Huntingdon Comparison Goods Market Share;
 - Plan 9 – Newmarket Comparison Goods Market Share;
 - Plan 10 – Ely Comparison Goods Market Share;
 - Appendix 1a – Competing Centres Modelling;
 - Appendix 1c – Competing Centres Key Indicators;
 - Appendix 5 – Convenience Goods Modelling;
 - Appendix 6 – Comparison Goods Modelling; and
 - Appendix 10 – Northstowe Impact Modelling