Nathaniel Lichfield and Partners

Planning Design Economics

CAMBRIDGE CITY COUNCIL AND SOUTH CAMBRIDGESHIRE DISTRICT COUNCIL

NORTH WEST CAMBRIDGE SUPPLEMENTARY RETAIL STUDY

CL12005/SB/SA/SPe

FINAL REPORT

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Nathaniel Lichfield & Partners Ltd
14 Regent's Wharf
All Saints Street
London N1 9RL

T 020 7837 4477
F 020 7837 2277

london@nlpplanning.com
www.nlpplanning.com

Offices also in
Cardiff
Manchester
Newcastle upon Tyne

Executive Summary

This 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. This is to inform a view on potential emerging proposals for foodstore development at one or more of three proposed Local Centres - the North West Area Action Plan (NW AAP) (University) Site, the NIAB Site and Orchard Park.

Sub-Region Convenience Retail Capacity Update

This Study updates the convenience retail capacity assessment provided in the Cambridge Sub-Regional Study (2008), taking account of increased population, lower expenditure growth rates, increased convenience floorspace in pipeline developments, and an allowance for turnover efficiency of existing floorspace. The updated figures suggest that a lower quantum of convenience floorspace will be required for the baseline scenario than that indicated in the 2008 Study and for the pipeline scenario, there is a lower level of convenience floorspace capacity to 2016. By 2021 a lower level of floorspace capacity is identified than in the 2008 Study, although not by a significant margin.

NW Cambridge Convenience Retail Need

The quantitative and qualitative need for new convenience foodstore floorspace in the North West Cambridge area, in addition to pipeline developments, has been assessed to 2021, having first defined its catchment area (by examining shopping patterns) and updated population and expenditure inputs.

The baseline quantitative need assessment for the NW Cambridge catchment area finds that there is capacity for an additional 234 sqm net convenience floorspace for a main foodstore operator at 2011, over and above the committed floorspace at Orchard Park, but a deficit (i.e. an over supply) once pipeline convenience developments are taken into account.

A qualitative need for a main foodstore within NW Cambridge is identified, as this part of the City is poorly served by main foodstores. This results in high levels of spending on food shopping by people living in the NW Cambridge area taking place outside the area, particularly to the Tesco stores at Milton and Bar Hill, and unsustainable travel patterns.

Three scenarios are identified to assess how much convenience retail capacity there might be in NW Cambridge, once an allowance has been made for the pipeline developments at the NIAB and University sites and the main foodstore provision, as necessary. It is considered unrealistic and unsustainable to plan for the existing low levels of convenience expenditure retention within this primary catchment continuing and that it is more sustainable to plan to increase convenience market shares in NW Cambridge by allowing for the introduction of a new main foodstore to meet the qualitative need, informed by

the equivalent market shares achieved by the existing large stores in Cambridge within their local catchment. This would result in convenience spending capacity beyond the pipeline developments of around £39m at 2021 (Scenario 3).

Nature and Scale of Retail Provision

Four alternative options have been identified and considered, to meet the quantitative and qualitative need for the additional convenience provision within North West Cambridge.

In the long term, up to 2021, either a single c. 3,500 sq m net superstore (Option 1) or two 2,000 sq m net supermarkets (output of Option 4) provide the most appropriate main foodstore provision within the planned Local Centres to meet the foodstore needs of NW Cambridge. However, given the need exists now, provision should be made for a single c. 2,000 sq m net supermarket (c. 1,500 sq m net convenience floorspace), with the capability to expand in the future or for a similar sized second store in another local centre if there proves to be such commercial demand.

Potential Centre locations

The relative merits of a new main foodstore in the three new centre locations have been compared, in very broad terms, to assess the appropriateness of each centre. This review has taken account of centre and foodstore distribution, accessibility and retail impact considerations.

All three local centre locations have merit, with University and NIAB ranked similarly and Orchard Park ranked a close third. However, from a retail and town centre planning perspective, given that retail impact differences are less material, greater weight should be given to the distribution of centres and main foodstores in Cambridge. On this basis, either the NW AAP (University) or the NIAB Site is likely to offer a better location for a larger local centre than Orchard Park. There are very few differences in the advantages and disadvantages of the NW AAP (University) and NIAB Sites.

However, the differences between the three sites should not be decided on this study alone, given the broad nature of this assessment and the slight differences between the ranking of each site location. Other factors, such as traffic impact and the timing of each development, are material to the selection of a main foodstore at one or two of the Local Centres.

Postscript (June 2010)

The North West Cambridge Supplemental Retail Study, convenience retail capacity update (Section 2.0) was completed in November 2009. Since the capacity update was finalised there have been a number of updates to data sources and existing/committed convenience floorspace figures. These changes are summarised below:

1 Housing Trajectories

The population projections (Table 1, Appendix 2b) are based on the housing trajectories in the South Cambridgeshire Annual Monitoring Report (AMR) and Cambridge City Annual Monitoring Report (AMR) published in December 2008, except for the trajectories for the new housing allocations in the South Cambridgeshire Site Specific Policies Development Plan Document (SSP DPD), and for the North West Cambridge Area Action Plan (NWAAP) development, (Inspectors' Report (August 2009) and the SSP DPD (October 2009)).

Since the population projections were calculated, updated Annual Monitoring Reports for South Cambridgeshire and Cambridge City have been published (December 2009). These reports now incorporate the new housing allocations in the South Cambridge SSP DPD and the latest housing trajectories for the North West Cambridge Area Action Plan (NWAAP).

Further to this, we understand that the housing development proposed in Cambridge East, included in the 2008 and 2009 AMR's, may not come forward at the timescales indicated as Marshall of Cambridge will not be relocating the airport in the near future.

2 Existing and Committed Convenience Floorspace

The following retail proposals have been granted planning permission since November 2009:

- Sainsbury's, Brooks Road, Cambridge: Extension to existing Sainsbury's Store of 2,709 sq m (app ref. 09/0843/FUL) approved on 30 April 2010.

The Tesco Express, East Road, Cambridge (approx. 220 sq m net) opened since the study was completed.

3 Implications of Changes

The updates/changes outlined above will not have a material impact on the convenience retail capacity update and will therefore not change the conclusions of the North West Cambridge Supplementary Retail Study.

These are in addition to the changes to existing floorspace from August to November 2009 referred to in para. 2.33 of the study.

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1.0 Introduction

1.1 Nathaniel Lichfield and Partners (NLP) were commissioned by Cambridge City Council and South Cambridgeshire District Council to undertake a Supplementary Retail Study (SRS) for North West Cambridge. This is in order to provide a more detailed retail planning evidence base for this area of Cambridge to inform a view on potential emerging proposals for foodstore development at one or more of three proposed Local Centres – at the North West Area Action Plan (NW AAP) (University) Site, the NIAB Site and Orchard Park.

1.2 This SRS responds to the requirements set out in the consultants' brief and comprises the following four stages of work:

- **Stage 1**: Update of the quantitative convenience goods analysis set out in the 2008 Cambridge Sub-Region Retail Study. This uses recent assumptions relating to population and expenditure, and revised information on pipeline developments, to provide an update of global sub-regional capacity.
- **Stage 2**: Assessment of the quantitative and qualitative need for convenience foodstore floorspace in North West Cambridge.
- **Stage 3**: Identification of potential options for the distribution of convenience retail provision in North West Cambridge to meet the identified retail need in 2021, having regard to the Local Centre function of these centres and retailers' formats and considerations for any earlier provision.
- **Stage 4**: Assessment of the relative merits of locating a main foodstore at the future Local Centres, in terms of the qualitative retail need, accessibility, impact, and the centre hierarchy. This includes consideration of the impact of a main foodstore in any of these locations on the delivery of Local Centres in the other two locations, as well as on existing centres.

1.3 The above four stages of work are set out in Sections 2.0 to 5.0 of this report. Our conclusions and recommendations arising from this are contained at Section 6.0.

2.0 Cambridge Sub-Region Convenience Retail Capacity Update

2.1 The Cambridge Sub-Regional Retail Study was undertaken by GVA Grimley and published in October 2008. The 2008 Study provides an assessment of quantitative retail need and capacity in the sub-region based on 20 individual survey zones covering Cambridge City, South Cambridgeshire and beyond (see Map 1 at Appendix 1).

2.2 This North West Cambridge Supplementary Retail Study (NWC SRS) provides an update of the convenience goods expenditure forecasts across the wider sub-region set out in the 2008 Study.

Cambridge Sub-Regional Retail Study: Quantitative Assessment

2.3 GVA Grimley estimated the current (baseline) performance of both Cambridge City and South Cambridgeshire's retail provision as a basis for forecasting the capacity for additional retail floorspace in the period to 2021.

2.4 The baseline position was developed by allocating the convenience expenditure available within the sub-region – calculated using estimates of population and per capita expenditure for each zone – to existing shopping destinations, on the basis of the household telephone survey of shopping patterns. GVA Grimley then compared the survey derived turnover of each shopping destination with the benchmark turnovers, to establish the trading performance of existing convenience floorspace within Cambridge and South Cambridgeshire.

2.5 GVA Grimley calculated the residual spending to support new shops, based on the difference between the available expenditure and benchmark turnover of existing shops, allowing for retail commitments but not pipeline developments.

2.6 Calculation errors were identified in the original (October 2008) GVA Grimley quantitative assessment (Appendix 5), as follows:

- some of the data inputs for Zones 1 and 2 had been exchanged with one another in error (Table 1), this resulted in the market shares for Zone 1 being applied to the expenditure for Zone 2, and vice versa.
- some of the stores in Zone 3 were allocated market shares of 0% in error, resulting in the estimated total convenience goods turnover (Tables 18 to 20) being lower than the actual position.

2.7 As a result, GVA Grimley updated their quantitative assessment in August 2009. These tables can be found in Appendix 2a of this SRS. The GVA August 2009 Update concluded there was capacity for 5,570 sqm net convenience floorspace in the sub-region in 2011, rising to 10,265 sqm net in 2016 and 13,390 sqm net in 2021 (Table 20, Appendix 2a).

2.8 The difference between the original (2008) and revised (August 2009) GVA findings on net convenience floorspace capacity are shown in Table 2-1 below:

Table 2-1: GVA Convenience Capacity Changes

	GVA 2008 Study (Table 20, Appendix 5)	GVA Revised Convenience Modelling (Table 20, Appendix 2b)
2011	4,130 sq m	5,570 sq m
2016	8,359 sq m	10,265 sq m
2021	11,216 sq m	13,390 sq m

2.9 We henceforth refer to the updated convenience goods capacity projections (August 2009) as part of the GVA Grimley 2008 Study (2008 Study).

Updated Data Inputs

2.10 To maintain the required compatibility with the GVA Study, we utilise GVA Grimley's methodology and approach to calculating convenience floorspace but employ the following more recent data assumptions, including:

- revised population projections to allow for planned housing growth in the sub-region;
- current expenditure growth rates, to take account of the effects of the economic recession on future levels of retail spending; and
- revised information on convenience floorspace commitments and pipeline developments, the latter of which is used for the scenario testing.

2.11 In addition to the use of recent data assumptions, we have made the following changes to sales density and turnover efficiency:

- Use of GVA Grimley constant sales densities for (i) 'Local Centre' / smaller convenience shops (£5,000/sqm net) and (ii) 'Town Centre' or main food shops (£10,000/sqm net) that are committed or in the development pipeline. This change was considered necessary as some of the sales densities employed by GVA Grimley for the committed / pipeline developments were considered to be either too low (e.g. £2,500 / sqm net at Orchard Park) or too high (e.g. £10,000 / sqm net for the small shops at Station Area and Southern Fringe) for the type of units proposed.
- Use of a consistent approach to turnover efficiency for existing, committed and pipeline developments (i.e. allowance for the sales density of existing and new floorspace to increase by a small amount each year). This change was considered necessary to assess the potential for existing floorspace to increase its productivity in the future. We have therefore adopted NLP's standard approach to convenience floorspace efficiency[1].

[1] Recent information published by Experian recommends a growth rate of 0.5% per annum for convenience space over the next 15 years. Experian's latest Brief (August 2009) suggest a decline in turnover efficiency between 2008 and 2011.NLP's approach is therefore to allow no growth in efficiency between 2007 to 2011, due to limited growth in expenditure and the effects of the recession, and allow 0.3% p.a. growth in efficiency after 2011 in line with the adoption of the ultra long term expenditure growth rate of 0.5% per annum.

2.12 The updated GVA Grimley capacity tables are set out at Appendix 2b of this SRS. Our changes to the data inputs assumed in the GVA 2008 Study (inc. the August 2009 capacity update) are set out below.

Population

2.13 We have updated the population projections used by GVA Grimley in the 2008 Study to reflect the current position in terms of the scale and phasing of planned housing growth within the sub-region.

2.14 The 2008 Study used baseline population estimates from the Experian E-marketer system and projected these forwards using mid-2006 population forecasts produced by the Research Group at Cambridgeshire County Council.

2.15 Cambridgeshire County Council has since updated its dwelling forecasts, which inform the population projections. More recent information on expected housing growth in the sub-region is provided in the latest City and South Cambridgeshire housing trajectories; these are set out in the South Cambridgeshire Annual Monitoring Report (AMR) and Cambridge City Annual Monitoring Report (AMR), December 2008, except for the trajectories for the new housing allocations in the South Cambridgeshire Site Specific Policies Development Plan Document (SSP DPD) to make up a Housing Shortfall in the district , and for the North West Cambridge Area Action Plan (NWAAP) development, which have both been amended since the publication of the AMRs. Information on the latest housing trajectories are set out in the Inspectors' Report into the NW AAP (August 2009) and the SSP DPD (October 2009).

2.16 We have compared the expected dwelling numbers and phasing of the planned housing developments up to 2021 set out in the mid-2006 population forecasts with those in the 2007/08 housing trajectories (updated as outlined above). The changes to the housing growth only affect developments in Zones 1 and 2, and are summarised in Table 2-2.

Table 2-2: Housing Developments in Planning Pipeline: Dwelling Numbers up to 2021

Zone	Site	2006 Dwelling Estimate	2007/08 Dwelling Estimate	Difference
Zone 1	**North West Cambridge**	**2,000**	**5,880**	**3,880**
	NIAB Site[2]	*2,000*	*1,780*	*-220*
	NIAB Extra site[3]	*0*	*1,100*	*1,100*
	North West AAP (University) Site[4]	*0*	*3,000*	*3,000*
	Arbury Park/ Orchard Park	**900**	**1,120**	**220**
	Zone 1 Subtotal	**2,900**	**7,000**	**4,100**
Zone 2	**Cambridge East**	**6,650**	**7,050**	**400**
	Southern Fringe	**3,550**	**3,750**	**200**
	Clay Farm	*2,300*	*2,270*	*-30*
	Glebe Farm	*0*	*280*	*280*
	Trumpington Meadows	*1,250*	*1,200*	*-50*
	Bell School	**350**	**347**	**-3**
	Zone 2 Subtotal	**10,550**	**11,147**	**597**

2.17 The main reason for the differences between the mid-2006 dwelling estimates used by GVA Grimley and the 2007/08 dwelling estimates, based on housing trajectories is that the 2006 forecasts are based on less detailed housing trajectory information. As a result, the 2006 dwelling forecasts involve a greater degree of interpolation and assume a more even distribution of housing compared to the 2007/08 housing trajectories, which utilise more accurate information on the spatial distribution and timing of expected housing growth in the Sub-Region, taken from up-to-date development plan documents. The housing provision planned on the NW AAP (University) site represents the greatest change to the dwelling forecasts in the two zones since the 2006 projections.

2.18 We have converted the projected dwelling numbers (up to 2021) to population growth, using an average household size of 2.34 persons, which is the assumption used in the GVA Grimley 2008 Study.

2.19 As well as the additional dwellings in the development pipeline, accommodation is also proposed for 2,000 students on the NW AAP (University) Site.

2.20 Table 2-3 below summarises how we have applied the difference in dwelling forecasts in Zones 1 and 2 (as set out in Table 2-2) to the population projections, including the expected phasing. It also makes an allowance for the additional 2,000 students at the NW AAP (University) Site.

[2] NIAB Site also known as Land between Huntingdon Road and Histon Road
[3] NIAB Extra Site also known as Land between Huntingdon Road and Histon Road
[4] NW AAP (University) Site also known as Land between Madingley Road and Huntingdon Road

Table 2-3: Pipeline development population projections

	Difference to dwelling forecasts (compared to 2008 Study)			
	2011	**2016**	**2021**	**Total**
Zone 1	-951	2,314	2,737	4,100
Zone 2	-2,200	447	2,350	597
	Difference to population projections resulting from dwelling forecasts			
	2011	**2016**	**2021**	**Total**
Zone 1	-2,225	5,415	6,405	9,594
Zone 2	-5,148	1,046	5,499	1,397
	Allowance for additional student population			
	2011	**2016**	**2021**	**Total**
Zone 1	0	1,000	1,000	2,000
Zone 2	0	0	0	0
	Cumulative change in population projections			
	2011	**2016**	**2021**	**Total**
Zone 1	-2,225	6,415,	7,405	11,594
Zone 2	-5,148	1,046	5,499	1,397

2.21 To provide the revised population projections, we have applied the cumulative difference in expected population growth by period to the base population data for that period from the 2008 Study.

2.22 Our revised population forecasts by zone are set out in Table 1 in Appendix 2b, with the resultant population growth rates set out in Table 1A.

Expenditure

2.23 GVA Grimley obtained 2006 estimates of per capita convenience goods expenditure from the Experian E-Marketer System and, after allowing for a deduction of Special Forms of Trading (SFT), grew these forwards using Experian's recommended convenience growth rate at that time, of 0.7% p.a.

2.24 Since the 2008 Study was undertaken, Experian has revised its growth rates in light of the current recession, with negative growth during 2009 and 2010 but with a recovery in 2011 and 2012.

2.25 We have updated the future estimates of per capita convenience goods expenditure by applying recent expenditure growth forecasts to the baseline data in the 2008 Study. We use Experian's expenditure growth rates (April 2009 Brief) to estimate expenditure to 2011:

- 2006 to 2007: 0.7%
- 2007 to 2008: 0.9%
- 2008 to 2009: -0.5%
- 2009 to 2010: -0.1%
- 2010 to 2011: 0.2%

2.26 These rates reflect the current economic downturn and provide an appropriate growth rate for the short term. In the longer term (post 2011) we consider it is more difficult to forecast year on year changes in expenditure, and in our view past trend line growth rates provide the most appropriate average growth rate and the potential post recession recovery. As such, Experian's ultra long term growth rate of 0.7% p.a. has been adopted post 2011.

2.27 The per capita convenience expenditure estimates are set out in Table 2 in Appendix 2b. In order to be consistent with the 2008 Study, we have used a 2006 price base.

2.28 It should be noted that the per capita expenditure figures include expenditure undertaken by students, and thus students' expenditure is treated in the same way as the normal resident population, consistent with the GVA Grimley approach. In reality, as students may not reside at their term time address for the entire year, this may lead to an over-estimation of total expenditure from the student population. This will be balanced to some degree by the fact that expenditure by the temporary population (such as visitors or summer language students) are not included in the expenditure estimates.

2.29 Total convenience expenditure estimates, which have been calculated by applying the per capita expenditure to the population estimates, are set out in Table 3, Appendix 2b.

2.30 This shows that there is £1,549m expenditure in the Study Area in 2008, which is forecast to grow to £1,587m by 2011, £1,727m by 2016 and £1,871m by 2021. The total expenditure estimates for 2011 and 2016 are lower than those set out in the 2008 Study (August 2009 update), due to the lower expenditure growth rates post 2008 and later phasing of the expected housing growth. However, by 2021 we estimate a higher level of total expenditure due to the increased number of dwellings now proposed to be built in North West Cambridge, particularly in the period 2016 to 2021.

Floorspace & Turnover Data

2.31 The estimates of existing convenience retail floorspace are those used in the 2008 Study, with updates to include a number of stores existing at the base date of this study, which were omitted from the 2008 Study. The updates are:

Cambridge City

- Tesco Express, Chesterton High Street.
- Co-op, Chesterton Road, Mitcham's Corner.
- Co-op, Girton Road.
- Co-op, Grantchester Street.
- One Stop, Carlton Terrace.
- One Stop, Hills Road.
- One Stop, Ditton Lane.
- Co-op, Milton Road.

South Cambridgeshire

- Co-op, Cottenham.
- Co-op, Histon.
- One Stop, Milton.

2.32 These updates are included on our Catchment Area and Foodstores Map and Cambridge Extract (at Appendix 1).

2.33 Since updating the existing floorspace in August 2009 and completing the convenience retail capacity update (November 2009) there have been the following changes to convenience provision:

- The Marks & Spencer foodstore in the Grafton Centre, Cambridge has closed and the Marks and Spencer foodstore at the Beehive Centre, Cambridge has opened.
- A Tesco Express has opened at Mill Road (180 sq m net).

2.34 As both of the new stores are relatively small scale and also outside the primary catchment area they would have not result in any material change to the convenience retail capacity update.

2.35 The total existing convenience floorspace in the Sub-Region is 33,706 sqm net (including the M&S, Grafton Centre, but excluding the new stores). This represents an increase of 1,657 sqm net over the convenience floorspace figure used in the 2008 Study (Table 14, Appendix 2a) and results in a total potential turnover of £354.5 million (Tables 14 and 15, Appendix 2b).

2.36 The estimates of committed convenience floorspace differ from those used in the 2008 Study for Orchard Park (Land at Arbury Camp). We understand this is because the figure used in the 2008 Study was based on the floorspace figures provided in the outline planning application, not the approved reserved matters. The total retail floorspace proposed is 1,523 sq m gross (958 sqm gross for the core convenience unit, 282 sqm gross additional A1 floorspace and 282 sqm gross floorspace in Class A2 to A5 uses). For this analysis, we have assumed all the A1 floorspace is convenience floorspace, resulting in a total convenience floorspace of 1,241 sq m gross (807 sq m net). This results in a turnover of £3.8 million at 2008, based on a sales density of £5,000 per sqm (Table 16, Appendix 2b).

Updated Convenience Capacity Assessment

2.37 The convenience goods capacity assessment for the Cambridge Sub-Region as a whole, as well as for Cambridge City and South Cambridgeshire District is set out in Tables 18-20 in Appendix 2b, and summarised in Table 2-4 below.

Table 2-4: Projected global capacity for convenience goods floorspace in the Sub-Region

	2011	2016	2021
Cambridge City (without pipeline)			
Surplus spending to support new floorspace (£000)	10,720	41,775	64,620
Assumed sales density (£ per sqm)	10,000	10,151	10,304
Capacity for new floorspace (sqm net)	2,072	4,115	6,271
South Cambridgeshire District (without pipeline)			
Surplus spending to support new floorspace (£000)	19,610	41,051	6,271
Assumed sales density (£ per sqm)	10,000	10,151	10,304
Capacity for new floorspace (sqm net)	1,961	4,044	6,092
Cambridge Sub-Region (without pipeline)			
Surplus spending to support new floorspace (£000)	30,320	82,826	127,392
Assumed sales density (£ per sqm)	10,000	10,151	10,304
Capacity for new floorspace (sqm net)	3,033	8,159	12,363

Based on Tables 18 to 20, Appendix 2b

2.38 Table 2-4 indicates that, excluding pipeline development, there is global capacity in the Cambridge Sub-Region for some 3,000 sqm (net) convenience floorspace at 2011, rising to 8,200 sqm (net) at 2016 and 12,400 sqm (net) at 2021 (rounded). Projections beyond 2011 should be treated with increased caution, given the difficulty in predicting future trends. In addition, it should be noted that the floorspace projections will vary depending on the type of convenience operator, for example a small supermarket operator or discount retailer will trade at a significantly lower sales density than that used to predict the indicative floorspace capacity shown above, resulting in a higher floorspace projection.

Effects of Pipeline Developments on Capacity

2.39 The 2008 Study developed the baseline capacity assessment to test alternative development scenarios.

2.40 This SRS provides a revised quantitative assessment to test an alternative convenience goods capacity scenario, based on recent information provided by Cambridge City Council and South Cambridgeshire District Council on the quantum and phasing of convenience floorspace in the development pipeline.

2.41 The estimated turnover of pipeline retail developments[5] in the Sub-Region is based on the 2008 Study, with updates to the pipeline assumptions based on advice from Cambridge City and South Cambridgeshire District Councils. The changes made to the pipeline assumptions are as follows:

[5] Pipeline developments exclude those commitments which have planning permission as these are included in the baseline assessment.

- **Cambourne**: the proposed 1,063 sq m net supermarket and 440 sq m net convenience shop units are no longer included in the development pipeline, as South Cambridgeshire District Council has advised that it is unlikely that these will come forward at this time.

- **Cambridge East**: in addition to the 3,000 sq m net convenience floorspace in the large district centre due to come forward in the period 2016-2021, an allowance has been made for 1,200 sq m net convenience floorspace for six Local Centres proposed in the Emerging Spatial Masterplan, consistent with the GVA Grimley study. This is calculated on the basis of two Local Centres providing 400 sq m net convenience floorspace each, due to come forwards in 2011-2016, and a further four Local Centres providing 100 sq m net convenience floorspace each, due to come forwards in 2016-2021. For the purposes of this study we have adopted a cautious approach of assuming all convenience floorspace will be in place by 2021. In practice local centres will be phased and therefore some of the convenience floorspace may not be delivered by 2021.

- **Cambridge Southern Fringe**: we have assumed convenience floorspace provision of 341 sq m net, to be completed by 2021, rather than the 682 sq m net included in the 2008 Study. Whilst the Council have resolved to grant planning permission for a total of 1,050 sq m gross (approximately 682 sq m net) A1 floorspace, it is unclear at this stage how much of this will be convenience floorspace. As such, we have assumed that half of the net floorspace will be in convenience use, i.e. 341 sq m net.

- **Land between Huntingdon Road and Histon Road (NIAB Site):** the planning application for the NIAB (City) site includes 1,200 sq m gross convenience floorspace. Assuming a 65% net: gross ratio, this results in a net convenience floorspace of 780 sqm net, to come forwards by 2016. However, there is now an allocation for a further 1,100 dwellings on the NIAB Extra site, with an associated emerging requirement for further retail floorspace, potentially through a larger local centre on the City site. Council officers have advised that for the purposes of this study a larger convenience unit of around 1,800 sqm gross (1,170 sqm net assuming a 65% net: gross ratio) is a reasonable assumption based on the size of the retail proposal in the NIAB planning application and increased in order to reflect the increase in dwellings on the wider site.

- **Land between Madingley Road and Huntingdon Road (NW AAP University Site)**: Council officers have advised that, for the purposes of this study, a convenience unit of around 2,500 sqm gross (1,625 sqm net assuming a 65% net: gross ratio) is a reasonable assumption for the University site based on the size of the retail proposal in the NIAB planning application. We have assumed this level of convenience floorspace, to come forward by 2016.

- **Northstowe**: in addition to the 5,525 sq m net convenience floorspace in the town centre due to come forwards in the period 2011-2016, five Local Centres are now proposed at Northstowe[6], for which a total allowance of 1,100 sq m net has been made. This includes a larger Local Centre with 500 sq m net convenience floorspace in the period 2011-2016 and three Local Centres providing 200 sq m net convenience floorspace each in the period 2016-2021. One Local Centre is not due to come forward until post 2021 and therefore we have not made allowance for it in our pipeline assessment.

2.42 It should be noted that as planning permission has been granted for the retail floorspace in the Local Centre at Orchard Park, the convenience unit has been included as a commitment in the baseline and is not considered in the development pipeline. However, the development has not yet been built and could in theory be considered as additional convenience floorspace capacity.

2.43 The turnover of the pipeline convenience developments are shown in Table 17 at Appendix 2b, with the expected phasing shown in Table 17A. The NIAB site is anticipated to have a convenience turnover of £5.9 million and the NW AAP University Site a convenience turnover of £8.2 million at 2016 increasing to £6.0 million and £8.4 million respectively in 2021.

2.44 The results of this scenario test including pipeline developments are shown in Table 21 at Appendix 2b and are replicated in Table 2-5 below.

Table 2-5: Projected global capacity for convenience goods floorspace in the Sub-Region including pipeline developments

	Convenience Goods		
	2011	**2016**	**2021**
Cambridge Sub-Region (with pipeline)			
Surplus spending to support new floorspace (£000)	30,329	3,385	8,931
Assumed sales density (£ per sqm)	10,000	10,151	10,304
Capacity for new floorspace (sqm net)	3,033	333	867

Based on Table 21, Appendix 2b

2.45 The pipeline developments are all expected to be completed in the periods 2011-2016 and 2016-2021. As such, there is no change to the expected capacity for additional convenience floorspace over the baseline position in 2011.

2.46 By 2016 and 2021, there is expected to be more limited capacity than the baseline position, 330 sqm net and 870 sqm net convenience floorspace respectively. This assumes that all pipeline developments come forward within the timescales currently anticipated; if this is not the case, the capacity estimates will increase accordingly.

[6] Northstowe Town Centres & Local Centres Strategy (section 6.5) (submitted with the planning application in December 2007).

2.47 This study considers the implications for convenience floorspace capacity of these pipeline developments coming forward in broad terms. Whilst the convenience floorspace assumed as part of these pipeline developments is not committed, the developments are generally established in principle through the Councils' Statutory Local Plans or LDF documents. Accordingly the pipeline convenience floorspace is considered to be 'protected' for the purposes of this capacity update.

Summary

2.48 The differences in the convenience floorspace capacity between the GVA 2008 Study (August 2009 revision in Appendix 2a) and the NLP 2009 update (Appendix 2b) are set out in Table 2-6 below.

Table 2-6: Convenience Floorspace Capacity (sqm net) Differences

	2011	2016	2021
Baseline			
GVA Study	5,570	10,265	13,390
NLP Update	3,033	8,159	12,363
Difference	-2,537	-2,106	-1,027
Pipeline Scenario			
GVA Study	4,913	4,244	1,272
NLP Update	3,033	333	867
Difference	-1,880	-3,911	-405

2.49 Our updated figures suggest that a lower quantum of convenience floorspace will be required than that indicated in the GVA Grimley Study for the baseline scenario. This reflects the lower per capita expenditure growth now expected, particularly in the short term to 2011, as well as the change in approach to turnover efficiency – i.e. some of the available capacity will be absorbed by existing floorspace.

2.50 For the pipeline floorspace, our update estimates a lower level of convenience floorspace capacity to 2016 than the GVA 2008 Study, due to a combination of the lower expenditure growth rates, the allowance for turnover efficiency of existing floorspace, the higher total turnover of existing floorspace and in particular the higher total turnover of the pipeline developments, resulting from increased floorspace assumptions for the proposed Local Centres at Northstowe, Cambridge East and the North West Cambridge AAP (University) Site. By 2021, we have still identified a lower level of floorspace capacity than in the 2008 Study, although not by a significant margin, notwithstanding the higher total population growth expected as a result of the pipeline developments.

3.0 North West Cambridge Retail Need Assessment

3.1 This section examines whether there is a local need for new convenience foodstore floorspace in the North West Cambridge area in addition to the pipeline developments. It utilises the household survey work previously undertaken by GVA Grimley, at a more detailed level.

Catchment Area

3.2 The Cambridge Sub-Region Retail Study covered a wide study area extending beyond Cambridge City and South Cambridgeshire districts. The study area was divided into 20 zones based on agglomerated postal sectors, with Zones 1 and 2 approximately covering Cambridge City, Zones 3 to 6 and Zone 15 approximately covering South Cambridgeshire, and Zones 7 to 14 and Zones 16 to 20 covering areas beyond the two district boundaries. This area is shown on the GVA Grimley Study Area and Household Survey Zones plan (Map 1, Appendix 1).

3.3 In order to examine the retail need in North West Cambridge in more detail, we have drilled down to a local level, and defined a smaller study area, disaggregated by postal sectors. The study area comprises a Primary Catchment Area (PCA) and a Secondary Catchment Area (SCA). This is shown on Map 2, our Catchment Area and Foodstores map, with an extract of the PCA and Cambridge City shown on Map 3, Appendix 1.

3.4 The extent of the PCA is the area within which the proposed new centres will meet food shopping needs. This is informed by the food shopping patterns of existing residents in North West Cambridge – which is indicative of the shopping patterns of the new population of the three expansion areas – as well as the market shares of existing stores.

3.5 In defining the catchment area, we have examined the GVA Grimley Household Survey (April 2008) shopping patterns for main food and top-up shopping, which informed the Cambridge Sub-Region Retail Study. We have obtained the survey results at a postal sector level (from GVA Grimley) and considered these, together with the location of the proposed new centres and the existing foodstores within North West Cambridge and beyond. Actual shopping patterns may vary, however, this is the best fit based on the information available at postcode sector level.

3.6 Our analysis of the household survey results has focused upon:

- The extent of the catchment area of existing foodstores within North West Cambridge. To do this, we have examined the market penetration of those stores within surrounding postal sectors (i.e. proportion of the population in a postal sector that use a particular foodstore). This is set out in 3-1 below.
- Food store destinations of residents within North West Cambridge (using the five postal sectors that correlate most closely with the area). This is shown in Table 3-2 below.

Table 3-1: North West Cambridge Foodstores: 2008 Market Shares*

Postal Sector	Aldi, Histon Road	Budgens, Arbury Road	Co-op, Girton Road	Co-op, Histon Road	Iceland, Histon Road	Tesco Express, Histon	Tesco Express, Campkin Road	Total
CB1 3							4.7%	**4.7%**
CB1 6						3.2%		**3.2%**
CB1 9	6.3%					4.6%		**10.8%**
CB2 1				3.1%				**3.1%**
CB3 0	2.3%		9.1%	8.5%				**19.9%**
CB3 7				0.9%			2.1%	**3.0%**
CB3 8	2.8%						0.6%	**3.4%**
CB4 0	37.5%				12.5%			**50.0%**
CB4 2		4.4%					2.9%	**7.4%**
CB4 3	9.9%			2.3%		5.4%		**12.2%**
CB4 5						3.8%	3.8%	**3.75%**
CB4 6							11.9%	**11.9%**
CB4 8	1.0%			2.8%	2.8%			**6.6%**
CB4 9						6.8%		**6.8%**
CB5 8							5.0%	**5.0%**

*Excludes postal sectors with a total market share from North West Cambridge stores of less than 3% within the catchment area.

Table 3-2 Food Shopping Destinations of North West Cambridge Residents, 2008

Market Share	**CB3 0**	**CB4 0**	**CB4 2**	**CB4 3**	**CB4 9**
Aldi, Histon Road	2.3%	37.5%		9.9%	
Asda, Beehive Centre, Coldhams Lane	6.3%		3.8%		
Budgens, Arbury Road			1.5%		
Co-op (East & Central), Girton Road	9.1%				
Co-op (East & Central), Hills Road				5.4%	
Co-op (East & Central), Histon Road	8.5%			2.3%	2.3%
Co-op (East & Central), Mill Road				5.4%	
Iceland, Histon Road		12.5%			
Local stores, Cambridge	2.3%		2.9%	2.3%	2.3%
Local stores, Histon					6.8%
Local stores, Impington					2.3%
Marks & Spencer, Sidney Street	2.3%		1.5%		
Morrisons, Broad Street, Cambourne	2.3%		1.5%		
Sainsbury's, Brooks Road, Coldhams Lane			11.3%	5.4%	
Sainsbury's, Sidney Street	12.5%			12.2%	
Tesco Express, High Street, Histon				5.4%	6.8%

Market Share	CB3 0	CB4 0	CB4 2	CB4 3	CB4 9
Tesco Extra, Viking Way, Bar Hill	43.8%			16.1%	34.1%
Tesco, Cambridge Road Ind Estate, Milton		50.0%	26.9%	21.4%	40.9%
Tesco, Cheddars Lane, Newmarket Road			21.7%	5.4%	
Tesco, Fordham Road, Newmarket	6.3%			2.3%	
Waitrose, Fred Archer Way, Newmarket			3.8%		
Waitrose, Hauxton Road, Trumpington			11.3%		
Other	4.3%	0.0%	13.8%	6.5%	4.5%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

3.7 We consider that the **PCA** comprises the five postal sectors which correlate most closely to North West Cambridge and contain the three new centres proposed at the NW AAP (University), NIAB and Orchard Park sites – i.e. CB3 0, CB4 0, CB4 2, CB4 3 and CB4 9 (The postal sector geography is illustrated on Map 4 at Appendix 1). The reasons for defining this are as follows:

- The seven foodstores within North West Cambridge listed in Table 3-1 are all relatively small (less than 1,000 sqm net), with only one store (Aldi, Histon Road) attracting trade from beyond the Cambridge postcode area, perhaps due to its unique market appeal as the only 'deep discounter' within the area. The postal sectors within which these foodstores in North West Cambridge have the greatest market penetration are CB3 0, CB4 0, CB4 2, CB4 3, CB4 6 and CB1 9.
- Postal sector CB4 9 is located close to the proposed new centre at Orchard Park. The Household Survey market shares show residents within this postal sector shopping within the small shops in Histon and the large stores at Bar Hill and Milton rather than the existing foodstores in North West Cambridge. We anticipate that a new centre, particularly at Orchard Park, could potentially alter shopping patterns for residents of CB4 9, as new foodstore provision within North West Cambridge is likely to be more easily accessible to these residents than the existing stores at Milton and Bar Hill. We therefore include this postal sector in the PCA.
- Postal sector CB4 6 is located further away from the proposed new Local Centres. The high market penetration in this postcode sector is solely due to the Tesco Express on Campkin Road. We have therefore not included this postcode sector within the PCA.
- Whilst over 10% of respondents in postal sector CB1 9 undertook food shopping in North West Cambridge (at the Aldi and Tesco Express stores), we have not included this sector within the PCA as it is located in South East Cambridge and residents would need to travel past a number of large foodstores to reach a new foodstore in North West Cambridge.
- Whilst we would expect some residents living in the villages closest to the city boundary – such as Madingley, Coton and Barton – to look to North West Cambridge for food shopping, we have excluded these areas from the PCA. This is due to the postal sector geography; these villages are located within very large postal sectors (CB3 7 and CB3 8) which extend as far as the South Cambridgeshire District boundary to the west. As it is not appropriate to include this whole area within the PCA we have not been able to include those villages.

3.8 The **SCA** is more extensive and covers the area over which the proposed new centres in North West Cambridge could potentially have a retail impact. This includes those postal sectors from which the existing foodstores in the PCA draw most of their trade, in addition to the postal sectors further afield within which residents of North West Cambridge are currently undertaking food shopping (i.e. primarily where there are large foodstores). Thus, the SCA covers Cambridge City and the settlements of Bar Hill, Cambourne and Milton, which contain large foodstores, as well as the surrounding rural area to the north west of Cambridge.

3.9 The catchment area zones are set out in Table 3-3 below.

Table 3-3: North West Cambridge Primary and Secondary Catchment Area

	Postal Sector	Name
PCA	CB 3 0	Girton
	CB 4 0	Cowley Road, Cambridge
	CB 4 2	King's Hedges, Cambridge
	CB 4 3	Histon Road, Cambridge
	CB 4 9	Histon, Impington
SCA	CB 1 1	King Street, Cambridge
	CB 1 2	Sturton Street, Cambridge
	CB 1 3	Romsey Town, Cambridge
	CB 1 7	Cherry Hinton Road, Cambridge
	CB 1 8	Queen Ediths Way, Cambridge
	CB 1 9	Cambridge (Incl Cherry Hinton)
	CB 2 1	Cambridge South, Cambridge
	CB 2 2	Cambridge (Incl Trumpington)
	CB 2 3	Cambridge West, Cambridge
	CB 3 6	Great Cambourne
	CB 3 7	Hardwick, Comberton, Haslingfield
	CB 3 8	Bar Hill, Papworth Everard
	CB 3 9	Cambridge (Incl Grantchester)
	CB 4 1	Cambridge (Incl Chesterton)
	CB 4 5	Willingham, Over, Swavesey
	CB 4 6	Milton
	CB 4 8	Cottenham, Landbeach, Rampton
	CB 5 8	Cambridge (Incl Fen Ditton)

3.10 It should be noted that the postal geography of Cambridge changed in late 2006. The Cambridge Sub-Regional Retail Study and Household Survey have utilised the old (pre 2006) postal sectors rather than the new sectors and as such we have based our catchment area on the old postal sectors.

Data Inputs

Population

3.11 The estimated population of the PCA and SCA at 2008 has been derived from Experian's MMG3[7] system which provides estimates of population based on trend-line projections and the 2001 Census for small, localised areas.

3.12 All of the postal sectors which constitute the PCA fall within Zone 1. As such, the population growth rate estimates for the PCA between 2008 and 2021 have been derived from the Zone 1 population growth rate estimates used in the 2008 Study (shown in Table 1A, Appendix 2b). The change in population growth as a result of the revised dwelling forecasts for the pipeline developments at the NW AAP (University), NIAB and Orchard Park sites are then added to this anticipated population increase, as these planned developments are all located within the PCA.

3.13 The postal sectors that comprise the SCA are split between Zones 1 to 4 of the 2008 Study. As such, we have obtained population data for the SCA on a postal sector level, and applied the relevant growth rates from the 2008 Study (Table 1A) to the individual postal sectors, before combining these to obtain the total population for the SCA at 2011, 2016 and 2021. The change in the expected population growth as a result of revised dwelling forecasts for the planned developments at Cambridge East, the Southern Fringe and the Bell School have subsequently been factored in, as these sites all fall within the SCA.

3.14 Population forecasts are set out in Table 1 in Appendix 3. The population within the PCA is 44,000 in 2008, and is expected to increase to 63,750 by 2021, an increase of 45%. The population within the SCA is 158,800 at 2008 which is expected to increase to 199,400 by 2021, an overall increase of 26%.

Expenditure

3.15 Per capita convenience expenditure of residents in the PCA and SCA in 2008 (2006 prices) has been derived from Experian MMG3. A deduction has been made for Special Forms of Trading (SFT), and the expenditure figures have then been projected forward on the basis of Experian's convenience goods expenditure projections outlined in Section 2.0 above. This is set out in Table 2 at Appendix 3.

3.16 The total convenience expenditure in the PCA and SCA are derived by combining the population with the per capita expenditure estimates. This is set out in Table 3 in Appendix 3 and replicated below.

[7] Experian's MMG3 system is the update to the E-Marketer system used by GVA Grimley in the 2008 Study, and thus its use here offers consistency of approach with the 2008 Study.

Table 3-4: Total Available Convenience Goods Expenditure (£m)

Zone	Convenience Expenditure £m				Growth in Convenience Expenditure (%)			
	2008	2011	2016	2021	2008-2011	2011-2016	2016-2021	2008-2021
PCA	68.6	69.6	87.4	105.1	1.5%	25.5%	20.3%	53.2%
SCA	245,8	259.7	302.6	326.3	5.6%	16.5%	7.8%	32.7%
Total	**314.4**	**329.3**	**390.0**	**431.3**	**4.7%**	**18.4%**	**10.6%**	**37.2%**

3.17 As a consequence of growth in population and per capita spending, convenience goods spending within the PCA is forecast to increase by 53% from £69m in 2008 to £105m in 2021, whilst in the SCA it is set to increase by 33% from £246m in 2008 to £326m in 2021.

Convenience Capacity

3.18 The detailed results of the household shopper questionnaire survey undertaken for the 2008 Study have been used to estimate existing shopping patterns within the PCA and SCA. The market shares for existing stores are set out in Table 4, Appendix 3 of this study. This identified that the PCA retains just 16% of residents' existing convenience shopping spending leaving an 84% outflow. The SCA market share is 5%.

3.19 The level of convenience goods expenditure attracted to shops in the PCA, from residents living within both the PCA and SCA is estimated to be £23m at 2008, as shown in Table 5, Appendix 3. Of this, £11m (49%) is derived from the PCA and £11m (51%) is derived from the SCA. The level of available convenience goods expenditure in 2011, 2016 and 2021 is shown at Tables 6 to 8, in Appendix 3. By 2021, the turnover of existing stores in the PCA is estimated to increase to £32m, due to the increase in population and available convenience expenditure. These tables assume 2008 market shares will be maintained in the future.

3.20 In order to assess the trading performance of stores in the PCA, we have compared the survey derived turnover of the existing stores in the PCA to their benchmark (company average) turnovers. These were calculated as part of the Stage 1 assessment (Table 14 at Appendix 2b), with the exception of a few smaller local stores, for which we have made assumptions of their benchmark turnover.

3.21 To derive the benchmark turnover, the same company average convenience sales densities (£/sq m net) for the foodstores in the Cambridge area were used as in the GVA 2008 study (Table 14, Appendix 2b), and are reproduced below in Table 3-5.

Table 3-5: Company Average Convenience Goods Floorspace Sales Densities

Operator	£/sq m net)
Asda	14,352
Tesco	12,894
Waitrose	11,601
Morrisons	11,173
Sainsbury	9,744
Co-Op	6,722
Iceland	5,715
Aldi	3,638
Budgens	3,342

3.22 The benchmark turnover of existing facilities in the PCA is £17.3m at 2008 (Table 9 at Appendix 3). We have allowed for growth in the turnover of existing floorspace, post 2011 (see para. 2.11).

3.23 Comparing the actual (survey derived) turnover of convenience floorspace in the PCA (£22.6m) to the benchmark turnover of facilities in the PCA (£17.3m), reveals that existing convenience floorspace is overtrading by some £5.4 million in total (35%). By 2021, this level of overtrading is expected to increase to £14.5m (or 87%).

3.24 We have made an allowance for the committed convenience floorspace within the PCA, using the turnovers derived from Table 16 in Appendix 2b. The only floorspace commitment in the PCA is the Land at Arbury Camp (Orchard Park), which we have included from 2011 onwards. We do not include any retail floorspace at the NW AAP (University) or NIAB Sites as, whilst these are policy proposals, they do not have the benefit of planning permission. We assess the policy proposals (pipeline developments) within the scenarios later in this section.

3.25 The committed convenience floorspace has an estimated turnover of £3.8 m in 2011. We have allowed for sales density growth of committed floorspace. The residual convenience expenditure capacity in the PCA is around £5.4m in 2008. In 2011 this falls to around £2.3m, due to development of the floorspace commitment at Orchard Park, and increases to £10.5m by 2021 due to the growth in available expenditure.

3.26 We translate this residual expenditure capacity to a floorspace requirement based on an appropriate sales density. A discount retailer or small independent foodstore operator will trade at a significantly lower sales density than one of the larger national supermarket operators. As such, in line with the GVA 2008 study (para. 10.33) we have used two alternative sales densities: £5,000 per sqm net, indicative of smaller foodstore operators, and £10,000 per sqm net for a main foodstore operator.

3.27 In reality the sales density of a main foodstore operator may be higher than £10,000 per sq m net. However, for consistency we have adopted the same sales density for mainstream foodstore operators within the capacity assessment as the GVA Grimley Study (£10,000 per sqm), providing a maximum residual capacity for a main foodstore operator.

3.28 We have made an allowance for 'sales density growth', consistent to the approach used for existing, committed and pipeline floorspace. This data is set out in Table 9 at Appendix 3 and summarised below.

Table 3-6: Surplus/deficit convenience goods expenditure in PCA 2008 to 2021

Store	2008	2011	2016	2021
Expenditure attracted to PCA (£m)	22.6	23.4	28.3	32.3
Benchmark turnover of existing facilities (£m)	17.3	17.3	17.5	17.8
Turnover of committed floorspace (£m)	0.0	3.8	3.9	3.9
Surplus/ deficit expenditure (£m)	5.4	2.3	6.9	10.5
Turnover density (£ per sqm net)				
> Smaller foodstore operator	5,000	5,000	5,075	5,152
> Larger foodstore operator	10,000	10,000	10,151	10,304
Sales floorspace sqm net				
> Smaller foodstore operator	1,071	468	1,359	2,047
> Larger foodstore operator	535	234	680	1,023

3.29 The residual convenience expenditure capacity identified in North West Cambridge before the introduction of pipeline development (figures rounded) equates to a floorspace requirement of 535 sq m net in 2008, if operated by a main foodstore operator; this falls to 234 sq m net in 2011 due to commitments, but increases to 1,023 sq m net by 2021. If operated by a smaller foodstore or discount operator, the floorspace requirement would be doubled; i.e. 1,071 sqm net in 2008, falling to 468 sq m net in 2011 before increasing to 2,047 sq m net in 2021.

Qualitative Need

3.30 In addition to assessing the quantitative need for new floorspace, we examine whether there is a qualitative need for additional convenience provision within North West Cambridge.

3.31 PPS4: Planning for Sustainable Economic Growth (December 2009) states that in assessing qualitative need for retail and leisure uses, local planning authorities should assess whether there is provision and distribution of shopping, leisure and local services, which allow genuine choice to meet the needs of the whole community, particularly those living in deprived areas, in light of the objective to promote vitality and viability of town centres and the application of the sequential approach (Policy EC.1.4.d.i).

3.32 A Practice Guidance (PG) on Need, Impact and the Sequential Approach accompanies PPS4. The PG is not policy but provides advice on preparing and understanding need and impact assessments and applying the sequential approach. To ensure a robust qualitative analysis, this section is based on the relevant qualitative factors identified in the PG (paras. 3.10 – 3.20) and set out below:

a Deficiencies or 'gaps' in existing provision

b Consumer choice and competition

c 'Overtrading' congestion and overcrowding of existing stores

d Location specific needs-deprived area considerations

e The quality of existing provision

Deficiencies or 'gaps' in existing provision

3.33 To determine whether there are any deficiencies in existing provision, we have looked at the location of existing District and Local Centres within North West Cambridge, together with the spatial distribution of existing convenience facilities.

District and Local Centres

3.34 Analysis of the location of defined retail centres in Cambridge City and South Cambridgeshire District (shown on Map 5, Appendix 1) indicates that a number of existing centres are located within or immediately adjacent to the PCA:

- Mitcham's Corner District Centre
- Histon & Impington Rural Centre
- Akeman Street Local Centre
- Arbury Court Local Centre
- Arbury Road/ Milton Road Local Centre
- Campkin Road Local Centre
- Histon Road Local Centre
- Kings Hedges Road Local Centre
- Victoria Road Local Centre

3.35 On this basis, the existing urban area of North West Cambridge appears to be well served by Local Centres, with one District Centre. However, analysis of the spatial distribution of these centres indicates that they are concentrated on the eastern side of the PCA, with very limited coverage of retail centres on the western side of the PCA, in particular around the NW AAP (University) Site and in Girton.

3.36 From our visits to the Mitcham's Corner District Centre and other Local Centres within the immediate catchment of the planned new centres in North West Cambridge (i.e. Histon Road, Akeman Street and Victoria Road), it is clear that there is a high degree of differentiation between the scale of the defined centres in Cambridge. For example, Histon Road Local Centre contains an (NLP) estimated 1,650 sqm net convenience retail floorspace in six convenience units all of which are national multiples. This greatly exceeds the convenience floorspace in Mitcham's Corner District Centre (550 sqm net in seven convenience units). Other Local Centres in North West Cambridge contain significantly less convenience provision than Histon Road Local Centre, for example Victoria Road Local Centre contains one convenience retail unit of around 130 sqm net, whilst Akeman Street Local Centre contains just two convenience units totalling 90 sqm net. On this basis, there appear to be significant differences in the convenience goods role performed by existing centres in the North West Cambridge retail hierarchy.

3.37 The Cambridge Local Plan describes the function of District and Local Centres as *"providing the ability to shop close to where people live and work. They help to meet day-to-day needs, thus reducing the need to travel and dependence on the private car"* (para.6.24). PPS4 (Annex B) provides more detailed definitions of District and Local Centres:

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

3.38 Based on these definitions, we would expect Local Centres to serve a localised catchment area, with a significant proportion of the population within walking distance of a Local Centre and within easy travel distance of a District Centre. The estimated catchment of existing local and district centres, based on a 500m and a 5 minute drivetime catchment, is shown in Plans 13 and 14 of the GVA 2008 Study. This distance/ travel time is considered to equate to that of a local catchment area.

3.39 These plans indicate that there are no existing retail centres located within 500 metres of any of the development sites on which major increases in housing are planned. Whilst the Orchard Park Site and NIAB housing will be located within a 5 minute drivetime of an existing defined centre, the majority of the residential areas within the NW AAP (University) Site will not. There are new local centres proposed in planning policies and these are addressed later in the report.

3.40 Furthermore, our site visits indicate that not even those people living within a five minute drivetime of an existing defined Local Centre necessarily have access to the full range of convenience uses outlined under the local centre definitions above. For example, neither Victoria Road nor Akeman Street Local Centres contain a small supermarket.

Convenience Floorspace

3.41 The existing stores located within the PCA are predominately convenience stores of less than 500 sqm net sales area with only two foodstores of between 500 and 1,000 sqm net and none of greater than 1,000 sqm net.

3.42 We have shown the existing multiple foodstores and convenience stores in and around North West Cambridge, together with 500m walking radii from these stores, on Map 7 at Appendix 1. The use of a 500m radius is consistent with the approach used by GVA Grimley in the 2008 Study.

3.43 This demonstrates that, whilst the majority of the population residing within the south-east of the PCA are within easy walking distance of a small foodstore or convenience store (Budgens, Iceland, Tesco Express, Aldi, Co-op), the areas covered by Orchard Park, the NIAB Site, the NW AAP (University) Site and the surrounding areas served by the proposed new centres at these sites are not within easy walking distance of any existing stores. Pipeline retail provision for the new development is considered below.

3.44 More significantly, as reflected in the household survey results, most evident from Map 2 of Appendix 1 depicting main foodstore provision, residents of the PCA have to travel outside of the PCA to undertake their main food shopping (See Table 3-2). The PCA retains just 16% of residents existing convenience shopping spending, leaving an outflow of 84% (Table 4, Appendix 3).

3.45 The principal large foodstores, their PCA market share and size are as follows:

Table 3-7: PCA Market Shares of Large Foodstores in Cambridge Area outside the PCA Net Sales Area

Store	Market Share	Net Sales Area	Net Convenience Floorspace (sqm)	Location
Tesco, Milton	23.5%	2,327	2,244	South Cambs
Tesco Extra, Bar Hill	19.1%	9,392	4,031	South Cambs
Tesco, Cheddars Lane	8.6%	4,933	2,673	City
Sainsbury's, Sidney Street	5.3%	1,326	1,260	City
Sainsbury's, Coldams Lane	5.1%	4,265	2,986	City
Waitrose, Trumpington	3.8%	2,976	2,678	City

Source: Table 4, Appendix 3.

3.46 Table 3-7 highlights the dominance of the Tesco stores at Milton and Bar Hill, together accounting for 42.6% of convenience spend amongst residents of the PCA. These six stores account for 65.4% of spending.

3.47 Indeed, it is apparent from analysis of the spatial distribution of large foodstores in Cambridge that there are no stores for main food shopping in the wider North and West Cambridge area as a whole. The closest foodstores capable of meeting existing residents' main food shopping requirements are Tesco, Milton; the Sainsbury's and Marks & Spencer stores in Cambridge City Centre; Tesco, Cheddars Lane; Asda, Beehive Centre; and Tesco Extra, Bar Hill. In comparison to the Centre, South and East of Cambridge, North West Cambridge is poorly served by main foodstores.

Consumer choice and competition

3.48 We have reviewed the current level of choice and competition in terms of the fascia and type of convenience retailer, and the unit size.

3.49 There are several national multiple retailers present in the PCA. However, these mostly appeal to the lower end of the market or are deep-discount retailers (Aldi Budgens and Iceland). There are also a number of independent convenience retailers situated within the defined retail centres in the PCA.

3.50 Whilst Co-op and Tesco have a presence in the PCA, these are the smaller format convenience stores (such as Tesco Express) rather than larger scale main foodstores capable of meeting the main food shopping needs of the population. As such, residents in the PCA currently lack choice in the range of foodstores that are available locally.

3.51 Whilst there is a reasonable amount of choice in terms of fascia, there is a relatively limited level of choice in terms of type of retailer or format of convenience store, with provision primarily catering for the lower 'discount' end of the market, and with the more mainstream retailers such as Tesco having a limited presence with small format stores catering for top-up shopping.

Overtrading, congestion and overcrowding of existing stores

3.52 The level of overtrading of existing convenience facilities is discussed at paragraph 3.23 above. Existing convenience goods facilities in the PCA are together overtrading by 39% at 2008. This level of overtrading increases over time, and would be 87% by 2021.

3.53 From analysis of the trading performance of individual stores in the PCA (Table 9 at Appendix 3), it is clear that the stores that exceed their company average benchmark level by the greatest proportion comprise the Tesco Express, Histon (trading at 127% above benchmark), the One Stop Shop, Carlton Terrace (123% above benchmark), and the Aldi, Histon Road (96% above benchmark).

3.54 The effects of overtrading in stores are often manifested through 'busyness' of the store, with problems such as queues at checkouts, congestion in the aisles and low stock, and also car parking congestion.

3.55 The high level of overtrading indicates a qualitative need for additional convenience goods floorspace. Although no site survey work has been undertaken to examine the situation in the PCA stores that are overtrading, our previous experience of stores that are performing well is consistent with the findings of the 2008 Study (Tables 10.1 and 10.2).

Location Specific Needs

3.56 North West Cambridge is not an Indices of Multiple Deprivation 'deprived area' but there are location specific needs for convenience shopping within the Local Centres proposed as an integral part of each UEA.

The quality of existing provision

3.57 The GVA 2008 Study included health checks of each of the defined centres in the sub-region (GVA 2008 Study, Appendix 3). The following provides a summary of these health checks for the centres located in the PCA, insofar as the results are relevant to this qualitative assessment:

- **Mitcham's Corner District Centre**: Mostly small units, many of which have been converted from residential properties. Limited on-street car parking and small customer car parks associated with some of the shops/businesses.
- **Akeman Street Local Centre**: Medium-sized units situated in a purpose-built terrace block which would benefit from refurbishment. On-street parking.
- **Arbury Court Local Centre**; Purpose built centre with small units, with the exception of a medium sized Budgens store. Free parking adjacent to Budgens.
- **Arbury Road/ Milton Road Local Centre**: Mainly small units, some converted from residential properties. Co-op occupies a purpose built retail unit. Off road forecourt parking. Some on-street parking.
- **Campkin Road Local Centre**: Purpose built precinct with a Tesco Express store. Some on-street parking bays.
- **Histon Road Local Centre**: Medium to large shop units, with the largest occupied by Aldi and Iceland, located in a modern purpose-built unit set back from Histon Road. Other shops in converted residential properties. Aldi and Iceland share a large customer car park, with some further off-street parking.
- **Kings Hedges Road Local Centre**: Generally small units in converted residential properties, with larger Co-op foodstore in purpose-built retail unit. Some off-street parking.
- **Victoria Road Local Centre**: Small to medium sized shop units are residential conversions and appear well maintained. Some short stay on-street parking.

3.58 Based on the GVA health-checks outlined above, there appears to be considerable variation in the quality of existing provision. Many of the units appear to be small, with few purpose built convenience stores, and in several centres there is limited on-street parking only. Histon Road Local Centre is the best served in terms of convenience provision, with two purpose built units housing Aldi and Iceland and a dedicated customer car park.

Qualitative Conclusion

3.59 The qualitative assessment identifies that there is an existing gap in main foodstore provision in NW Cambridge, with limited choice and competition in main food shopping and overtrading at existing stores notwithstanding the considerable variation in their quality. The introduction of major housing and population expansion on the University, NIAB and Orchard Park sites will lead to the introduction of new local centres (committed and pipeline developments). However, none are presently proposed to include stores of a scale to meet the main food shopping needs of existing and future residents of the PCA.

3.60 The resident population of the PCA is forecast to grow from 44,000 in 2008 to 63,750 in 2021. This is a large existing residential population, due to increase by 45%, which is not served by a main foodstore within the catchment. 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.

3.61 The addition of large-format foodstore provision in North West Cambridge would significantly reduce leakage of expenditure from the PCA and thus significantly reduces the need for residents to travel by car to undertake main food shopping, bringing about more sustainable travel patterns and reducing the carbon footprint for the existing and future population.

Proposed Development in North West Cambridge

3.62 Given that we have identified a qualitative need for main foodstore provision within North West Cambridge, we have sought to assess the quantitative need for additional convenience floorspace to identify the most appropriate level of provision. In doing so, we have undertaken three alternative scenarios of convenience floorspace capacity in North West Cambridge, taking account of the committed and pipeline developments.

3.63 Each scenario assesses the capacity generated on a different market share assumption i.e. different assumptions on the proportion of residents' convenience expenditure spent at stores in the PCA. Each assesses whether that expenditure capacity is directed towards the larger foodstore operators (e.g. Tesco, Sainsbury's, Waitrose, Morrisons, Asda) which have higher company average sales density (£10,000 per sq m is the generic figure used in the 2008 GVA study, irrespective of store format or size) or discount/smaller operators (e.g. Co-op, Aldi, Lidl, Budgens, Somerfield) which have lower company average sales densities (£5,000 per sq m is the GVA figure). For example, if a Tesco Express convenience store or a Tesco superstore were considered to take up the capacity, a £10,000 per sq m sales density figure is assumed for that convenience floorspace.

3.64 The three scenarios are as follows:

- **Scenario 1**: Constant market shares.
  This scenario includes the committed and pipeline development in NW Cambridge in the capacity assessment, but assumes this does not change the market shares (i.e. only the same amount of money is spent in PCA shops by PCA & SCA by residents even though there would be more convenience retail provision in NW Cambridge). This is simply an update of the baseline position incorporating pipeline development, consistent with the GVA approach. We do not consider the maintenance of current market shares to be a realistic prospect in practice.

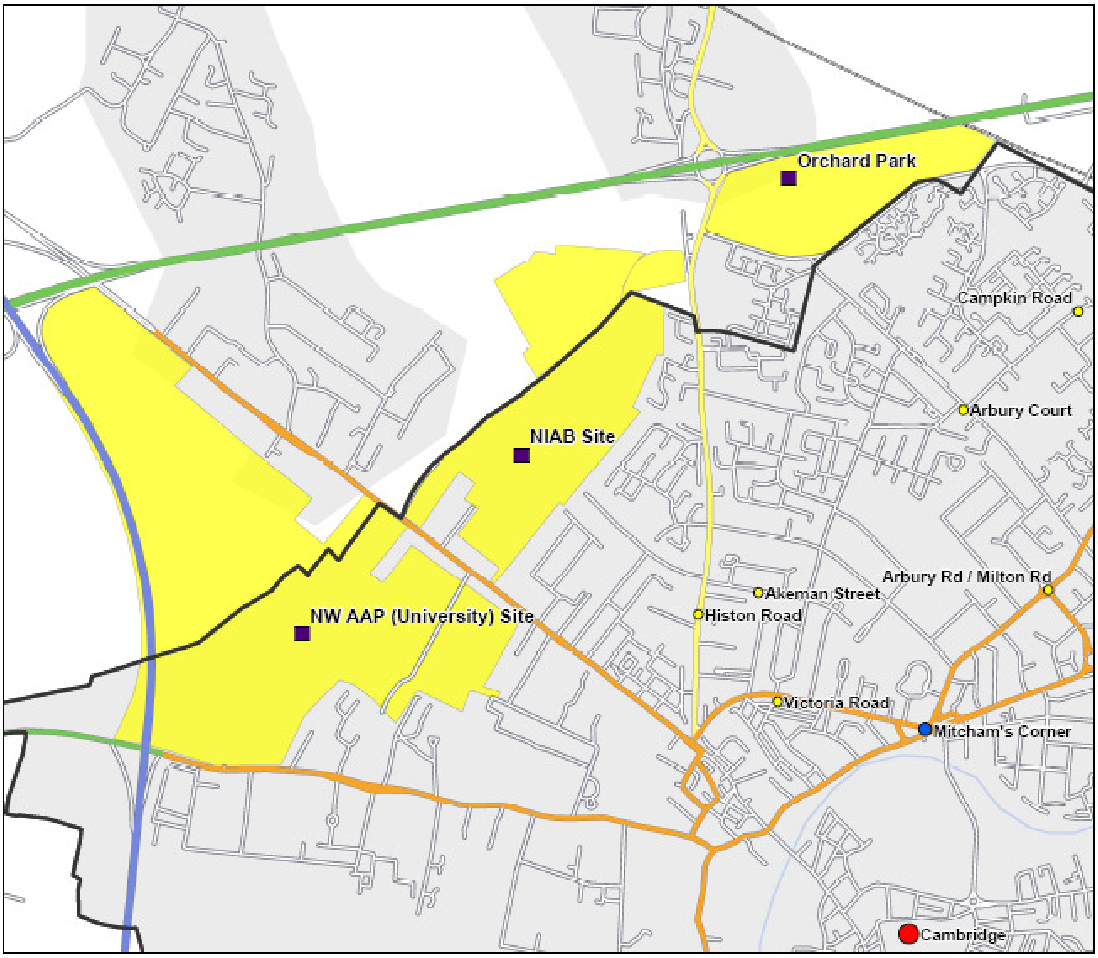
- **Scenario 2:** Committed/pipeline market shares increase.
  This scenario assumes that market shares in the PCA & SCA will increase on a pro-rata basis with the convenience turnover increase associated with the committed and pipeline floorspace (i.e. new retail provision in NW Cambridge will mean that residents in the PCA and SCA spend more of their overall expenditure on convenience goods in the local area, calculated on a pro rata basis in line with the increase in turnover).

- **Scenario 3:** Main foodstore market shares increase
  This scenario assumes that the market shares of PCA shops will increase to reflect the average market share actually achieved by existing main foodstores in Cambridge City and South Cambridgeshire (i.e. a new main foodstore in NW Cambridge would mean that residents in the PCA and SCA will spend more of their expenditure on convenience goods in the local area, calculated in line with the average level achieved by the existing main foodstores).

Scenario 1: Constant Market Shares

3.65 There are three proposed Local Centres, to be located within North West Cambridge at the NW AAP (University) Site, the NIAB Site and Orchard Park. Orchard Park is a commitment and has therefore already been included in the baseline assessment. The NW AAP (University) Site and the NIAB Site are current planning policy proposals and are therefore referred to as pipeline developments. The three wider development sites and indicative locations for the three proposed Local Centres are shown on Map 6 in Appendix 1, and on Figure 3-1 below.

Figure 3-1: Development Sites and Centres in North West Cambridge



3.66 The status of these Local Centres and expected convenience provision is as follows:

3.67 **The principle of a Local Centre** is established at the **NW AAP (University) Site** by Policy 9/7(e) of the Adopted Cambridge City Local Plan and confirmed by the adoption of the North West AAP on 22 October 2009. We have made an allowance for 1,625 sqm net at this NW AAP (University) Site by 2016 (as set out at para. 2.39 of this report).

3.68 The proposed Local Centre at the **NIAB Site** is not set out explicitly in the local plan. Policy 9/8 of the Cambridge City Local Plan sets out the principal land uses for the sites and makes reference to 'complementary mixed uses'. Policy 9/3(j) sets out the requirement for the urban extensions to include a mix of uses in Classes A1 to A5, whilst Policy 6/8 (d) supports convenience shopping as part of the urban extensions. The Local Centre is the subject of an outline planning application, although this is currently undetermined and it is not therefore a commitment at this stage.

3.69 The South Cambridgeshire Site Specific Policies DPD (Jan 2010) allocation of the NIAB Extra Site for housing also requires retail provision, potentially through a larger local centre in the City NIAB Site. We have allowed a total convenience floorspace of 1,170 sqm net for the NIAB City and NIAB Extra sites, based on an assumed 1,800 sqm gross convenience floorspace by 2016 (i.e. 65% net: gross ratio). This is based on Officer recommendations on the expected level of convenience provision (as set out at para.2.39 of this report).

3.70 The principle of a Local Centre is the subject of planning permission for the **Orchard Park** site, and is therefore considered to be a commitment. The planning permission includes 1,523 sqm gross retail floorspace (958 sqm gross for the core convenience unit, 282 sqm gross additional A1 floorspace and 282 sqm gross floorspace in Class A2 to A5 uses). As this floorspace is committed, we have taken all A1 floorspace to be convenience floorspace. Therefore 807 sq m net has been allowed for in the baseline assessment of floorspace capacity above, and is assumed to exist in 2011.

3.71 Table 10 at Appendix 3 factors the additional convenience floorspace proposed at the NIAB Site and NW AAP (University) Site in the development pipeline into the quantitative assessment for North West Cambridge. The results of this exercise are shown in Table 3-8.

Table 3-8: Surplus/deficit convenience goods expenditure in PCA 2008 to 2021 (Scenario 1)

Store	**2008**	**2011**	**2016**	**122021**
Total Convenience Expenditure in PCA (£m)	22.6	23.4	28.3	32.3
Benchmark Turnover of Existing Convenience Floorspace (£m)	17.3	17.3	17.5	17.8
Turnover of Committed Convenience Floorspace (£m)	0.0	3.8	3.9	3.9
Turnover of Pipeline Convenience Floorspace (£m)	0.0	0.0	14.2	14.4
Surplus/ deficit expenditure (£m)	5.4	2.3	-7.3	-3.9
Turnover density (£ per sqm)				
> Smaller foodstore operator	5,000	5,000	5,075	5,152
> Larger foodstore operator	10,000	10,000	10,151	10,304
Sales floorspace sqm net				
> Smaller foodstore operator	1,071	468	-1,436	-748
> Larger foodstore operator	535	234	-718	-374

Source: Tables 9 & 10, Appendix 3

3.72 Capacity for additional convenience floorspace remains unchanged at 2008 and 2011, as pipeline developments are not expected to come forward until after this time. By 2016 and 2021, there is an oversupply of convenience floorspace, as the committed and pipeline developments absorb all available expenditure capacity.

3.73 Scenario 1 is included for consistency with the GVA Grimley 2008 Study and to assess whether there is future capacity with existing market shares unchanged.

However, this scenario is unrealistic as it is likely that the present low market shares would increase, given the sizeable increase in and distribution of committed/pipeline convenience floorspace in the PCA.

Scenario 2: Committed/Pipeline Floorspace Increased Market Shares

3.74 The floorspace estimates in Scenario 1 above are based on maintaining the current market shares. At present, there is a considerable level of convenience outflow from North West Cambridge to large foodstores outside the city, particularly those at Bar Hill and Milton. Only 16% of convenience expenditure is retained in the PCA and there is 5% inflow from the SCA (Table 4, Appendix 3).

3.75 It is likely that the planned convenience floorspace provision at the proposed Local Centres within North West Cambridge would retain more expenditure, by reducing the need for residents to travel outside of the PCA to undertake their convenience goods shopping, and thus increasing market shares in the PCA. We have therefore undertaken two scenario tests based on an increase in convenience market shares; this scenario test (2) considers a 'pro-rata' increase in market shares based on the uplift in expected turnover of convenience floorspace in the PCA – i.e. we have allowed for the total market share of convenience floorspace in the PCA to increase by the same proportion as the turnover would increase, following development of the committed and pipeline convenience floorspace in the three proposed local centres. The expected increase in market shares is set out in Table 11 at Appendix 3.

3.76 The benchmark turnover of existing convenience stores in the PCA is £17.3m in 2011 rising to £17.8m in 2021. The total turnover of the combined committed and pipeline floorspace at Orchard Park, NIAB and the NW AAP (University) Sites is £3.8m in 2011, and £18m by 2016 / 2021. Therefore, by 2011, we would expect the benchmark turnover of existing and new floorspace to total £21m (a 22% increase) rising to £36.1mm by 2021 (a 103% increase).

3.77 Thus, we estimate that by increasing the market shares on a pro-rata basis in line with the benchmark turnover of existing and new floorspace (103% by 2021), the combined market share of convenience floorspace in the PCA would increase from 16% to 33% (from PCA residents) and 5% to 10% (from SCA residents) by 2021 (Table 11, Appendix 3).

3.78 The convenience turnover and floorspace projections allowing for these market share increases are set out in Table 12, Appendix 3, and replicated in Table 3.9.

Table 3-9: Surplus/deficit convenience goods expenditure in PCA 2008 to 2021 (Scenario 2)

	2008	2011	2016	2021
Total Convenience Expenditure in PCA (£m)	22.6	28.6	57.6	65.6
Benchmark Turnover of Existing Convenience Floorspace (£m)	17.3	17.3	17.5	17.8
Turnover of Committed Convenience Floorspace (£m)	0.0	3.8	3.9	3.9
Turnover of Pipeline Convenience Floorspace (£m)	0.0	0.0	14.2	14.4
Total Benchmark Turnover of Existing and New Floorspace (£m)	17.3	21.1	35.6	36.1
Surplus/ Deficit Expenditure (£m)	5.4	7.5	21.9	29.5
Turnover Density for New Floorspace £ per sqm				
Smaller foodstore operator	£5,000	£5,000	£5,075	£5,152
Larger foodstore operator	£10,000	£10,000	£10,151	£10,304
Sales Floorspace (sqm Net)				
Smaller foodstore operator	1,071	1,508	4,319	5,717
Larger foodstore operator	535	754	2,160	2,859

Source: Tables 11 & 12, Appendix 3

3.79 Whilst there is no change to the residual expenditure capacity in 2008 (£5.4 million) as market shares are not expected to change until the committed and pipeline floorspace is developed, there is expected to be £7.5m residual expenditure by 2011, rising to £29.5m by 2021, as a result of the increase in market shares. The resultant convenience floorspace capacity in the PCA (figures rounded) is between 800 sq m net and 1,500 sq m net in 2011, depending on the operator and thus the sales density applied, increasing to between 2,900 sq m net and 5,700 sq m net by 2021.

Scenario 3: Main Foodstore Increased Market Shares

3.80 In this scenario, we increase the market shares as a result of new main foodstore development. We examine the market shares achieved by the existing main foodstores (as shown in Tables 4, 6, 8, 10 and 12 of Appendix 2b) as a proxy for what a main foodstore in North West Cambridge ought to achieve.

3.81 We look at the local catchment zone for each foodstore as a proxy of the PCA, and other nearby zones as a proxy for the SCA.

Table 3-10: Market Shares achieved by Main Foodstores

Store	Net convenience floorspace (sqm)	PCA Equivalent		SCA Equivalent	
		Market share	Zone	Market share	Zone
Tesco, Bar Hill	4,031	45%	4	13%	1/3
Sainsbury's, Coldhams Lane	2,986	21%	2	9%	1
Waitrose, Trumpington	2,678	14%	2	3%	1
Tesco, Cheddars Lane	2,673	9%	1	6%	2
Asda, Beehive Centre	2,601	4%	1	2%	2
Tesco, Cherry Hinton	2,458	28%	6	14%	2
Tesco, Milton	2,244	29%	1	17%	2
Sainsbury's, Sidney Street	1,260	6%	1	4%	2
Marks & Spencer, Sidney St	1,112	2%	1	2%	2

Source: Table 14 (floorspace), Tables 4, 6, 8, 10 and 12 (market shares), Appendix 2b

3.82 Both the size and location of the stores have a bearing on their market shares. Whilst the largest stores generally have higher market shares, the stores located outside of Cambridge City Centre also have higher shares compared to the more central stores. We would expect a main food store located in North West Cambridge to be comparable (and able to achieve similar market shares) to the stores in the table above with the exception of Tesco Extra at Bar Hill and the two City Centre (Sidney Street) stores. We therefore consider a market share in the region of 18% from the PCA and 9% from the SCA is realistic for a main foodstore, which is the average of the market shares of the six stores above in their respective local zones (i.e. all stores except Tesco, Bar Hill and the two City Centre stores).

3.83 We would expect a single main foodstore in NW Cambridge might exceed this market share, particularly given the present market shares of Milton (23%) and Bar Hill (19%) from the PCA. However, we would also expect a new main foodstore to depress the existing market share of PCA shops to some extent. For the purposes of this study, we assume a 2% PCA market share reduction (i.e. 16% baseline + 18% new store - 2% trade diversion) and 1% from the SCA (i.e. 5% baseline + 9% new store - 1% trade diversion).

3.84 Accordingly we test a total combined market share of existing and new floorspace in the PCA (i.e. 16% baseline +18% new store - 2% trade diversion) of 32% from the PCA and 13% from the SCA (i.e. 5% + 9% - 1%) in 2021. This is set out in Table 13 of Appendix 3.

3.85 The convenience turnover and floorspace projections allowing for these market share increases are set out in Table 14 of Appendix 3 and replicated in Table 3-11.

Table 3-11: Surplus/deficit convenience goods expenditure in PCA 2008 to 2021 (Scenario 3)

	2008	2011	2016	2021
Total Convenience Expenditure in PCA (£m)	22.6	23.4	66.5	75.2
Benchmark Turnover of Existing Convenience Floorspace (£m)	17.3	17.3	17.5	17.8
Turnover of Committed Convenience Floorspace (£m)	0.0	3.8	3.9	3.9
Turnover of Pipeline Convenience Floorspace (£m)	0.0	0.0	14.2	14.4
Surplus/ Deficit Expenditure (£m)	5.4	2.3	30.9	39.1
Turnover Density for New Floorspace £ per sqm				
Large foodstore operator	£10,000	£10,000	£10,151	£10,304
Sales Floorspace (sqm net)				
Large foodstore operator	535	234	3,044	3,791

Source: Tables 13 & 14, Appendix 3

3.86 We have not allowed for a market share increase until 2016, as we assume the delivery of a new main foodstore would be linked with the delivery of the new centres, which GVA Grimley assume in the 2008 Study would be by 2016 (the implications of possible early delivery are addressed at paragraph 4.72 to 4.79). In 2016, the higher market shares result in a convenience floorspace capacity of 3,000 sqm net, rising to 3,800 sqm net by 2021, over and above the committed and pipeline developments. This floorspace allowance is on the basis of a larger mainstream foodstore operator; we have not included the floorspace capacity for a smaller / discount foodstore operator. This is because the basis for this scenario is the market share which could be achieved by a main foodstore; this level of market share is only likely to be achieved by a main foodstore operator, and therefore this scenario is not compatible with a smaller or discount foodstore operator.

Summary

3.87 The quantitative and qualitative need for additional convenience floorspace in the North West Cambridge area has been assessed to 2021, having first defined its catchment area and updated population and expenditure inputs.

3.88 There is a qualitative need for main foodstores in North West Cambridge:

1. There is a high level of convenience trade leakage (84%) from the PCA as residents travel outside the local area to undertake main food shopping.
2. There is a lack of choice in terms of the type and format of convenience store, as there are no main foodstores within this part of the City, and those stores that are present are small and cater mainly to the lower end of the market and top-up shopping.

3 As a group, the existing convenience stores in North West Cambridge are overtrading, with many individual stores trading at around twice their benchmark level.

3.89 The baseline capacity and three capacity scenarios have been tested:

- The baseline position assessed convenience floorspace capacity based on constant market shares with the Orchard Park commitment, but not the pipeline developments at the NIAB and University sites.
- Scenario 1 factors in the pipeline retail proposals at the NIAB Site and the University Site, but assumes that market shares remain constant (This is a theoretical scenario as in reality it is unlikely that market shares would remain unchanged with an increase in convenience floorspace).
- Scenario 2 tests the increase in market share that might result from new convenience commitments/pipeline proposals in North West Cambridge on a pro-rata basis to the increase in floorspace turnover in the PCA i.e. 103% of existing market shares in 2016 and 2021. (This scenario ignores the expectation that in reality the new floorspace would also depress the market shares of the existing shops to some extent).
- Scenario 3 assumes a main foodstore in North West Cambridge could achieve a market share similar to those achieved by other main foodstores in Cambridge; it applies the average market share of the six large stores and makes an allowance for a market share decrease in existing stores in the PCA (This is the most realistic scenario).

3.90 The convenience floorspace capacity for the baseline and the three scenarios are shown in Table 3-12.

Table 3-12 Convenience Goods Capacity in PCA 2008 to 2021

	Convenience Goods Capacity (Sqm net)			
	2008	**2011**	**2016**	**2021**
Larger Foodstore Operator (SD £10,000 / sqm net)				
Baseline Position (Existing Market Share) inc. commitment	535	234	680	1,023
Scenario 1: Existing Market share - inc. pipeline	535	234	-718	-374
Scenario 2: Increased Market Share – pro rata	535	754	2,160	2,859
Scenario 3: Increased Market Share – main foodstores	535	234	3,044	3,791
Smaller Foodstore Operator (SD £5,000 / sqm net)				
Baseline Position (Existing Market Share) inc. commitment.	1,071	468	1,359	2,047
Scenario 1: Existing Market Share - Including pipeline development	1,071	468	-1,436	-748
Scenario 2: Increased Market Share – pro rata	1,071	1,508	4,319	5,717
Scenario 3: Increased Market Share – main foodstores	n/a	n/a	n/a	n/a

Source: Tables 9-14, Appendix 3

3.91 Scenario 1 identifies that there is insufficient capacity to accommodate the NIAB and NW AAP (University) pipeline developments until after 2021 if these do not change the present low market shares (16% from PCA, 5% from SCA) of existing stores in the PCA. However, as indicated, it is unrealistic to not expect or plan for a change in market share in these circumstances.

3.92 Scenario 2 identifies the potential increase in market share as a consequence of convenience commitment and pipeline developments at Orchard Park, NIAB and NW AAP (University) .The scenario is thought optimistic as it does not allow for trade drawn from existing stores and there is also unlikely to be commercial demand for the amount of smaller foodstore format floorspace indicated by the retail capacity.

3.93 Scenario 3 identifies that there is potential to broadly double current market shares if a typical main foodstore is introduced within the PCA (from 16% to 32% for the PCA and from 5% to 13% for the SCA). It should be noted that this is a cautious approach as this does not take into account the increase in market share as a consequence of both a main foodstore and the committed floorspace at the other two centres. This might be capable of increasing the PCA share to between 35% and 40%, and thus further increase the expenditure capacity available.

3.94 If the Scenario 3 surplus £39.1m expenditure at 2021 (see table 3-11) were converted into large foodstore floorspace for which there is clearly existing qualitative need, this would support a maximum total convenience floorspace of 3,791 sq m net. This is in addition to the committed and pipeline retail developments at Orchard Park, the NIAB Site and the NW AAP (University) Site which envisage small supermarkets in their local centres.

3.95 The following section examines the options of accommodating the identified quantitative and qualitative need for additional convenience floorspace in North West Cambridge, and Section 5 compares the relative merits of potential foodstore locations.

4.0 # Nature and Scale of Retail Provision

4.1 In Section 3, we identified the primary qualitative need for a large foodstore and a surplus convenience expenditure capacity of around £39 million in North West Cambridge by 2021, in addition to committed and pipeline development, once a realistic allowance is made for an increase in market share (i.e. Scenario 3).

4.2 On this basis, we consider that there are several potential options to meet the identified qualitative and quantitative need for additional convenience provision within North West Cambridge.

Options for Meeting Need

4.3 We have identified four 'theoretical' options for meeting the identified need for convenience provision in North West Cambridge at 2021. These options have been developed taking into consideration:

- The qualitative need for a main foodstore, and the appropriate size of that foodstore.
- The maximum amount of convenience turnover expenditure identified within the retail capacity scenario 3 in the previous section.
- The alternative retail formats for accommodating the residual capacity after allowing for a main foodstore.
- How the size of a main foodstore would fit with the existing retail hierarchy.

4.4 These theoretical options consider the potential convenience expenditure configuration based on the level of convenience turnover expenditure identified at 2021. This level of capacity assumes that all three North West Cambridge development sites are complete, with the housing levels and phasing currently assumed. It also assumes that the current low market shares in North West Cambridge will significantly increase. As this may not happen in reality, not all of our options look to absorb all of the identified capacity.

4.5 It is likely that there would be some phasing of development in reality, with a lower level of provision expected in the earlier years of the three developments. This study will provide broad recommendations on how to meet the level of identified need; it is envisaged that a more detailed consideration of the configuration and phasing of development on each site will be considered at a later stage, during the development management process.

4.6 We consider the general configuration of surplus expenditure which would best meet the identified quantitative and qualitative needs and make recommendations on the most appropriate centres to meet these needs in the following section.

4.7 At this stage it is unclear which operator will occupy the committed and pipeline floorspace, or indeed whether any operator will do so; this is for the market to determine. In our experience, in so far as the foodstore market can be categorised by store size in net retail (i.e. convenience and comparison) floorspace terms, foodstores can be broadly divided into the following categories[8]:

a Convenience stores, generally 200 to 300 sqm net retail floorspace. These are operated by both the larger grocery operators, but generally aimed at top-up shopping (e.g. Co-op, Sainsbury's Local or Tesco Express), small operators (e.g. Spar or Londis) and independents.

b Supermarkets generally around 800 to 1,500 sqm net retail floorspace, either occupied by discount retailers such as Aldi or Lidl, by main foodstore retailers in 'town centre' format stores (e.g. Sainsbury's Central or Tesco Metro) or others such as Budgens or Somerfield.

c Superstores of 2,500 sqm net retail floorspace minimum and usually much larger, operated by one of the large grocery retailers.

4.8 This categorisation, consistent with PPS4 Annex A, is largely reflected in the foodstore provision in the Cambridge sub-region (see Tables 14 & 15, Appendix 2b), with superstores ranging in net retail floorspace from Waitrose at Trumpington (2,976 sq m) to the Tesco store at Bar Hill (9,392 sq m) – excluding the Tesco store at Milton (2,327 sq m).

4.9 However, the foodstore retail market is continually subject to innovation and change over time, with operators developing new format stores to increase their representation in different locations throughout the UK. Recent market evidence indicates that there has been an emergence of new smaller format grocery stores. For example:

- The store acquisitions following Co-op's purchase of Somerfield were central to last year's changing market, leading to new smaller stores for Morrisons, Sainsbury's and Waitrose.
- Waitrose has announced that it will be opening smaller format convenience stores in summer 2010 which will have a sales area between 186 and 372 sq m (2,000 and 4,000 sq ft) e.g. Fitzroy Street, Cambridge opening in Summer 2010.
- Asda plan to open 100 smaller format stores (743 to 2323 sq m (8,000 to 25,000 sq ft)) over the next three to five years (according to analysts JP Morgan, 17 February 2010).
- Operators and developers are now promoting a wider range of store sizes in a wider range of settlements (e.g. Tesco supermarkets at Ramsey and Brandon).

4.10 The type of convenience shopping trip undertaken is becoming ever more complex as the variety of store sizes and formats increase. Superstores

[8] The categories above refer to the total net retail floorspace of a store. Our capacity analysis identifies the net convenience goods floorspace capacity (only); comparison goods floorspace is dealt with in para. 4.33 to 4.34.

predominantly attract bulk or main food and grocery shopping trips (mostly by car), supermarkets 'shopping basket' trips and convenience stores 'top-up' trips. This reflects the huge differences in the retail offer and number of product lines (from 300 in convenience stores to over 40,000 in the largest superstores). The increasingly broader size and format range, together with the increase in Internet purchasing and doorstep delivery (e.g. Tesco Direct, Ocado) is leading to a wider range in the type of shopping trips.

4.11 This increased range of retail formats and offer responds to lifestyle and demographic changes, and provides greater innovation and competition. It adds to the factors that influence shopper behaviour. For main food shopping, the key factors have long been store proximity and relative accessibility, pricing, brand loyalty, in-store and car parking congestion, and car park pricing. Store size and format changes will influence that behaviour too. There might be more 'trolley/basket' hybrid trips with less frequent bulk grocery or top-up shopping, for example.

4.12 The sales density performance of foodstores also varies widely depending on both the retail format, store size, location and offer, but published data is only available on company average basis for each retailer (see para. 3.21). We have therefore tested the retail capacity available on the basis that this will vary depending on whether the commitments /pipeline foodstores are to be operated by discount foodstores / small format supermarket operators which have lower sales densities (£5,000 per sqm net, assumed by GVA and adopted by NLP) or main foodstores which have higher sales densities (£10,000 per sq m net, assumed by GVA and adopted by NLP). To assess this, two alternative capacity assessments have been provided for each sales density option for the committed/pipeline developments, consistent with the GVA Study.

4.13 In order to make an allowance for small convenience shops within each centre, in addition to the committed and pipeline developments, we have surveyed the small convenience shops situated within the existing Local Centres in North West Cambridge (Histon Road, Akeman Street and Victoria Road). On this basis, we consider that a figure of 200 sqm net per Local Centre is appropriate for small convenience shops. At a sales density of £2,500 per sqm net (the GVA small shops figure at Table 16, Appendix 5), this results in a convenience turnover of £0.5 million. However, we have made an allowance for double this amount of floorspace to allow for potential variations in the amount of local shops and sales performance, for the purposes of testing retail capacity. i.e. £1.0m for each centre.

4.14 In summary, we assume:

i a main foodstore will be provided in at least one of the centres, similar in size to the existing main foodstores (2,244 to 4,031 sq m convenience net, Table 14, Appendix 2b);

ii the surplus expenditure within the NW Cambridge catchment area is £39 million at 2021 (Scenario 3) in addition to the committed and pipeline retail developments at Orchard Park, the NIAB Site and the NW AAP (University) Site; and

iii £1 million will be available for small convenience shops within each of the proposed centres.

4.15 Accordingly, following discussions with the Council, the options we consider are as follows:

- **Option 1**: A main foodstore of 2,500 sqm convenience floorspace (3,500 sqm net retail) –the minimal level expected for a new main foodstore to fully compete with the existing foodstores in Cambridge. This is provided in one centre (absorbing its committed/pipeline capacity), with the committed/pipeline convenience unit provided in the other two centres. This level of convenience floorspace is at the lower end of the size range of the existing main foodstores in the Cambridge area (e.g. Tesco, Yarrow Road). Any residual capacity is left for other shops, including smaller foodstores, elsewhere in North West Cambridge, or within one of the other two proposed centres.

- **Option 2**: This is identical to Option 1, but a main foodstore of 3,000 sqm convenience floorspace (4,300 sqm net retail) would be provided (absorbing its committed/pipeline capacity), with the committed / pipeline convenience unit provided in the other two centres. This level of convenience floorspace is similar to the largest of the largest existing main foodstores in Cambridge (excluding Tesco at Bar Hill). Residual capacity is left for other shops including smaller foodstores, elsewhere in North West Cambridge or within one of the other two proposed centres.

- **Option 3:** Having made a turnover allowance for small convenience shops in each centre and other shops in North West Cambridge, the residual capacity is divided equally between the three centres and combined with the pipeline / committed floorspace in each centre. Thus, the foodstore floorspace supported by the retail capacity in all three local centres is the output of this option. The convenience turnover of each centre and floorspace will vary depending on the centre the foodstore is located in.

- **Option 4:** Having made an allowance for small convenience shops in each centre and other shops in North West Cambridge, the residual capacity is divided equally between two of the three centres and combined with the pipeline / committed floorspace in each of those centres. Thus, the foodstore floorspace supported by the retail capacity in two of the local centres is the output of this option. (The convenience turnover of each centre and floorspace will vary depending on the centre the foodstores are located in, with the committed / pipeline convenience floorspace being assumed in the other centre.)

4.16 Thus, the size of main foodstore assessed in Options 1 and 2 is an 'option input', whereas the size of stores identified in Options 3 and 4 are 'option outputs'. Tables 1 to 4 in Appendix 4 set out the capacity assessment for Options 1 to 4 and our analysis is set out below.

4.17 As indicated in para. 4.12, we have tested each option assuming the committed/pipeline supermarket floorspace has a convenience sales density of £5,000 per sqm net and £10,000 per sqm net, consistent with the approach in the GVA 2008 study and our earlier capacity analysis.

4.18 However, the sales density performance of foodstores varies amongst the operators and different store formats (see para. 3.21) and the average convenience sales density for the top five operators is around £12,000 per sq m net. This is based on the same company average sales densities used in the GVA 2008 Study (Asda £14,352 per sq m, Tesco £12,894 per sq m, Morrisons £11,601 per sq m, Waitrose £11,173 per sq m and Sainsbury's £9,744 per sq m).

4.19 We have therefore tested the main foodstore allowance for Options 1 and 2 taking the most cautious approach by adopting the higher average convenience goods floorspace sales density of £12,000 per sq m at 2008.

Table 4-1: Projected Sales Density of Main Foodstore Allowance

	2008	2011	2016	2021
Sales Density of Main Foodstore Provision (£ per sq m)	£12,000	£12,000	£12,181	£12,365

4.20 At 2021, taking into account turnover efficiency[9], the average convenience sales density is therefore estimated to be around £12,400 per sq m, as shown in Table 4-1 above. We therefore adopt a more cautious approach by assuming the large foodstore in Options 1 and 2 trades at £12,400 per sq m net convenience.

Option 1

4.21 Option 1 allows for a main foodstore of 2,500 sqm net convenience floorspace in one centre (See Table 1, Appendix 4). At a sales density of £12,400 per sqm net at 2021, this will result in a food store convenience turnover of £31 million (and a centre turnover of £32 million). The store would absorb the centres' committed/pipeline capacity. The committed /pipeline convenience unit would be provided in the other two centres and an allowance is made for small convenience units in each centre. The resulting maximum residual capacity is identified for other shops including smaller foodstores elsewhere in NW Cambridge or within one of the other two proposed centres.

[9] NLP's approach is to allow no growth in efficiency between 2007 to 2011, due to limited growth in expenditure and the effects of the recession, and allow 0.3% p.a. growth in efficiency after 2011 in line with the adoption of Experian's ultra long term expenditure growth rate of 0.7% per annum (Experian's April 2009 Brief).

Table 4-2: Option 1: Convenience Expenditure Capacity

	Orchard Park	NIAB	NW APP (University)	Maximum Residual Turnover (£M)
Expenditure				
[A] Turnover of Centres if Main Foodstore provided at Orchard Park (£M)	32.0	7.0 to 13.1	9.4 to 17.7	- 5.4 to 9.0
[B] Turnover of Centres if Main Foodstore provided at NIAB (£M)	4.9 to 8.9	32.0	9.4 to 17.7	–1.2 to 11.1
[C] Turnover of Centres if Main Foodstore provided at NW AAP (University) (£M)	4.9 to 8.9	7.0 to 13.1	32.0	+3.4 to 13.5

*Centre turnover comprises new foodstore turnover and allowance for small shops
Source: Table 1, Appendix 4

4.22 This option would result in one large centre with a convenience turnover of £32 million. The turnover of the convenience floorspace in the other two centres would vary depending on the sales density of the pipeline/committed floorspace and in turn so would the maximum residual convenience capacity/floorspace in each centre. If the committed/pipeline floorspace has a sales density of £10,000 per sqm net (at 2008) this would result in a small deficit of expenditure in two centres and a small surplus at the University site. If the committed/pipeline floorspace has a sales density of £5,000 per sqm net (at 2008), there would be surplus convenience expenditure available in each centre.

Option 2

4.23 Option 2 is identical to Option 1, but a main foodstore of 3,000 sqm net convenience floorspace would be provided (See Table 2, Appendix 4). Again, we assume that that the main foodstore would have a sales density of £12,400 per sqm net resulting in a foodstore convenience turnover of £37 million (and a centre turnover of £38.2 million), and the store would absorb the centres' committed/pipeline capacity and the committed/pipeline convenience unit would be provided in the other two centres. An allowance is also made for small convenience units in each centre. The resulting maximum residual capacity is identified for other shops, including smaller foodstores elsewhere in NW Cambridge or within one of the other two proposed centres.

Table 4-3 Option 2: Convenience Expenditure Capacity

	Orchard Park	NIAB	NW AAP (University)	Maximum Residual Turnover (£M)
Expenditure				
[A] Turnover of Centres if Main Foodstore provided at Orchard Park (£M)	38.2	7.0 to 13.1	9.4 to 17.7	-11.6 to 2.8
[B] Turnover of Centres if Main Foodstore provided at NIAB (£M)	4.9 to 8.9	38.2	9.4 to 17.7	-7.4 to 4.9
[C] Turnover of Centres if Main Foodstore provided at NW AAP (University) (£M)	4.9 to 8.9	7.0 to 13.1	38.2	-2.8 to 7.3

*Centre turnover comprises new foodstore turnover and allowance for small shops
Source: Table 2, Appendix 4

4.24 This option would result in one large centre with a turnover of £38.2 million including a main foodstore of 3,000 sqm net convenience floorspace. The turnover of the convenience floorspace in the other two centres would vary depending on the sales density of the pipeline/committed floorspace and in turn so would the maximum residual convenience capacity/floorspace in each centre. If the committed/pipeline floorspace has a sales density of £10,000 per sqm net this would result in a small deficit of expenditure in two centres and a small surplus at the University site. If the committed/pipeline floorspace has a sales density of £5,000 per sqm net, there would be a small surplus convenience expenditure available in each centre.

Option 3

4.25 In Option 3, having made an allowance for small convenience shops (£1.0 million) in the 3 local centres and an allowance for other shops elsewhere in North West Cambridge (£5.0 million), we identify the residual convenience capacity (See Table 3, Appendix 4) to be divided equally between the three centres, combined with the committed/pipeline floorspace in each centre. This turnover potential is then converted into floorspace potential to indicates the maximise size of the 3 foodstores capable of being supported in each centre.

Table 4-4: Option 3: Convenience Expenditure Capacity

	Orchard Park	**NIAB**	**NW AAP (University)**
Expenditure			
[A] Turnover of Each Centre (£M)	13.1 to 15.3	17.3 to 17.4	19.8 to 21.9

*Centre turnover comprises new foodstore turnover and allowance for small shops
Source: Table 3, Appendix 4

4.26 This option would result in three centres with a broadly similar amount of convenience floorspace. The turnover of each centre varies depending on the scale and sales density of the committed/pipeline floorspace.

4.27 To provide an estimate of the convenience goods floorspace of the foodstore at each centre, based on the Option 3, we have first deducted £1 million from the turnover of each centre (the allowance made for small convenience shops) and then converted the residual expenditure into floorspace, based on the sales density adopted for the main foodstore in Options 1 and 2 (£12,400 per sq m net at 2021). The range of net convenience floorspace in the foodstore at each centre is as follows:

- Orchard Park 979 to 1,151 sq m net
- NIAB 1,317 to 1,320 sq m net
- NW AAP (University) 1,514 to 1,688 sq m net

4.28 The option results in three larger foodstores, although each much smaller than the single large main foodstores in Options 1 and 2.

Option 4

4.29 In Option 4, having made an allowance for small convenience shops (£1.0 million) in the 3 local centres) and an allowance for other shops elsewhere in North West Cambridge (£5.0 million), we identify the residual convenience capacity within the catchment area (See Table 4, Appendix 4) to be divided equally between two of the three centres, combined with the committed/pipeline floorspace in each of those centres. This turnover potential is then converted into floorspace potential to indicates the maximise size of the 2 foodstores capable of being supported in 2 of the local centres, with the committed/pipeline floorspace assumed to be provided in the other centre.

Table 4-5: Option 4: Convenience Expenditure Capacity

	Orchard Park	NIAB	NW AAP (University)
Expenditure			
[A] Turnover of Centres if Residual Expenditure split between Orchard Park and NIAB (£M)	15.3 to 20.5	19.5 to 22.6	9.4 to 17.7
[B] Turnover of Centres if Residual Expenditure split between Orchard Park and NW AAP (University) (£M)	15.3 to 20.5	7.0 to 13.1	24.1 to 25.0
[C] Turnover of Centres if Residual Expenditure split between NIAB and NW AAP (University) (£M)	4.9 to 8.9	19.5 to 22.6	24.1 to 25.0

*Centre turnover comprises new foodstore turnover and allowance for small shops
Source: Table 4, Appendix 4

4.30 This would result in two larger centres and one smaller centre. The turnover of the centres varies depending on the scale and sales density of the committed/pipeline floorspace.

4.31 To provide an estimate of the convenience goods floorspace of the foodstore at each centre, based on the Option 4, we have first deducted £1 million from the turnover of each centre (the allowance made for small convenience shops) and then converted the residual expenditure into floorspace, based on the sales density adopted for the main foodstore in Options 1 and 2 (£12,400 per sq m net at 2021). The range of net convenience floorspace in the foodstore is as follows:

- Orchard Park 315 to 1,569 sq m net
- NIAB 484 to 1,738 sq m net
- NW AAP (University) 677 to 1,932 sq m net

4.32 This would result in two larger foodstores in two of the three proposed local centres, albeit smaller than the single large main foodstore in Options 1 and 2.

Main Foodstore Comparison Floorspace

4.33 Main foodstores typically contain an element of comparison goods floorspace, and thus the total net sales area of a main foodstore will be higher than the convenience goods floorspace figures provided in the options analysis. The convenience/comparison split of main foodstores varies, the average of the top five main foodstore operators is a 70:30 convenience/comparison split. Assuming this split, the main foodstores in options 1 and 2 would have the following total net floorspace:

- Option 1: Total floorspace of 3,571 sqm net (2,500 sqm net convenience and 1,071 sqm net comparison floorspace) at any one centre.
- Option 2: Total floorspace of 4,286 sqm net (3,000 sqm net convenience and 1,286 sqm net comparison floorspace) at any one centre.

4.34 For Options 3 and 4, the convenience floorspace figures and implied store sizes are outputs from examining what floorspace might be supported by splitting the available foodstore turnover two (Option 4) or three (Option 3) ways. The convenience floorspace supported varies from a 1,151 sq m (the minimum in Option 3) to 1,932 sq m (the maximum in option 4). In all Option 4 scenarios, two stores with 1,500 sqm convenience floorspace can be supported. This equates to a 2,000 sqm net retail store (i.e. 500 sqm comparison floorspace), as this size of store would have a higher convenience: comparison ratio of 75% (see Appendix 3, Table 14 for how this split varies for different store sizes). These options demonstrate that two stores of 2,000 sq m net can be comfortably supported by the turnover available, with the committed/pipeline size store in the other local centre.

4.35 We now explore how the size of a main foodstore, the total level of convenience turnover, and the expected configuration of convenience units would fit in the retail hierarchy.

Centre Role and Function

4.36 The centres to be developed on the NW AAP (University), NIAB Sites and Orchard Park are all proposed in planning policy or planning application documentation to be Local Centres in the retail hierarchy.

Centre Definitions

4.37 The role and function of Local Centres is described in PPS4 (Annex B), as follows:

*"Local Centres include a range of small shops of a local nature, serving a small catchment. Typically, Local Centres might include, amongst other shops, a **small supermarket**, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a Local Centre"* (emphasis added).

4.38 PPS4 does not define the term 'small supermarket' explicitly, although supermarkets are considered to have less than 2,500 sqm net trading floorspace, with superstores defined as containing more than 2,500 sqm net trading floorspace (PPS4, Annex B). A small supermarket would therefore be notably smaller than 2,500 sqm net.

4.39 For comparison, PPS4 defines District Centres as follows (Annex B):

"District centres will usually comprise groups of shops often containing at least one ***supermarket or superstore****, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library"* (emphasis added).

4.40 The Cambridge City Local Plan (adopted 2006) defines Local Centres as *"Small grouping usually comprising a newsagent, a general grocery store, a sub-post office and occasionally a pharmacy, a hairdresser and other small shops of a local nature"* (Glossary, p. 168). District Centres are defined as *"Group of shops, separate from the town centre, usually containing at least one food supermarket or superstore, and non-retail services such as banks, building societies and restaurants"* (p. 166). No definition is provided in the emerging Cambridge City Core Strategy.

4.41 Similarly, neither the South Cambridgeshire Core Strategy (adopted 2007), nor the Development Control Policies DPD (adopted 2007) include a definition of a Local Centre.

4.42 Specifically, the anticipated role and function of the proposed Local Centres on the three development sites in North West Cambridge is as follows:

NW AAP (University) Site

4.43 The NW AAP (University) Site falls across Cambridge City Council and South Cambridgeshire District Council's areas. The policy framework for the University site is provided by the North West Cambridge AAP (Adopted October 2009). Policy NW21 set out the requirements for a Local Centre as part of the development site, and states that "*Where appropriate, all services and facilities will be provided in a single centre at the heart of the development".*

4.44 The accompanying text (Para.7.10) states that it is anticipated that the Local Centre will comprise a range of services and facilities including an appropriate level of local shopping and other services.

4.45 Para. 7.9 notes that the centre can also provide for some of the needs of those who live or work in neighbouring communities, whilst it is also suggested at Para.7.11 that some of the services and facilities may be provided outside the development, for example in a Local Centre in the new neighbourhood being established north of Huntingdon Road [NIAB Site].

4.46 A definition of the Local Centre is provided in the AAP glossary, as a *"Small grouping usually comprising a newsagent, a small supermarket, a sub-post office and occasionally a pharmacy, a hairdresser and other small shops of a local nature"*. The Inspector's Report on the AAP (August 2009) (Para.11.7) required this definition to include reference to a 'small supermarket' rather than 'general grocery store', in order to be consistent with PPS6 (now PPS4) and to achieve soundness.

NIAB Site

4.47 The largest part of the NIAB Site falls within Cambridge City Council area. Whilst the Cambridge Local Plan sets out that an appropriate mix of uses should be provided on the site, there is no specific policy requirement for a Local Centre to be provided on the NIAB Site. There is however a current planning application for development on the site which includes a Local Centre (07/0003/OUT). The composition of the Local Centre is currently under discussion, but this may include *"library, health care, community and retail provision"* (NIAB Planning Statement, Para.5.3).

4.48 The NIAB Extra Site is allocated in by the South Cambridgeshire Site Specific Policies DPD for residential development. The policy requires local facilities including retail, and notes that this may be provided in the City NIAB Site. The working assumption is that the NIAB Local Centre would be enlarged to serve the whole site and the Masterplan accompanying the planning application for the City Site identifies a reserve area of land to provide for this.

Orchard Park

4.49 Orchard Park lies within South Cambridgeshire District Council area and is allocated in the Site Specific Policies DPD for housing led development, to include a local centre, a policy carried forward from the South Cambridgeshire Local Plan 2004.

4.50 Outline planning permission was granted in June 2005 for the Orchard Park development (S/2379/01/O). No Local Centre definition is provided, although the permission includes 'up to 0.56 hectares of Local Centre facilities (A1, A2, A3, A4, A5 and D1 uses)'.

4.51 Approval was granted in August 2009 for a reserved matters application relating to the Local Centre. This includes 1,523 sq m gross of retail floorspace (958 sqm gross for the core convenience unit, 282 sqm gross additional A1 floorspace and 282 sqm gross floorspace in Class A2 to A5 uses).

Existing Local Centres

4.52 There are 22 Local Centres situated in Cambridge City, with 13 rural and minor rural centres – which generally perform the role of Local Centres – in South Cambridgeshire.

4.53 We have visited the three Local Centres situated within North West Cambridge – Akeman Street, Histon Road and Victoria Road. The location of these three Local Centres is shown on the Retail Hierarchy Map (Map 5 at Appendix 1).

4.54 The centres vary considerably in size and function, as follows:

- **Akeman Street Local Centre** is a small Local Centre containing only five retail units, two of which are convenience retailers: a newsagent (c.50 sqm net) and a bakery (c.40 sqm net). There are no national multiple retailers within the centre, which appears to play a very limited role in providing retail goods and services to local residents and is likely to have a small catchment area extending to adjacent residential streets only.

- **Histon Road Local Centre** is a large Local Centre, which contains a mixture of modern small and medium sized retail units. The centre comprises ten retail units of which eight are national multiples. In total the centre contains an estimated 1,650 sqm net convenience floorspace, occupied by six national multiple convenience retailers: Aldi, Co-op, Iceland, Martins, Wine Rack and an Esso Garage convenience shop. The centre is in good health and performs a local shopping role which extends beyond the immediate residential area for the provision of convenience goods.

- **Victoria Road Local Centre** is a very small Local Centre, with only four retail units: a 130 sqm net convenience store (Victoria Road Stores), an estate agent, a take away unit and a hairdresser. The units are separated by residential properties and tend to function as freestanding, neighbourhood shops.

4.55 Whilst we have not visited the other Local Centres in Cambridge and South Cambridgeshire (for the purposes of this study); they were reviewed by GVA Grimley for the 2008 Sub Regional Study (Sections 6.0 and 7.0; Appendices 3 and 4). No floorspace information is provided, but the Study contained a summary of the number of units within the centres. The 22 Local Centres in Cambridge City range in size from three units to 31 units, and contain between one and six convenience units (GVA Table 6.1). In terms of foodstore provision, there are a number of multiple retailers in the Local Centres, which are generally convenience stores to small sized foodstores such as Tesco Express, Budgens, Co-op, Iceland and Aldi.

4.56 The 13 rural and minor rural centres in South Cambridgeshire are generally larger, with between 12 and 57 units in total, and between one and ten convenience units (GVA Table 7.1). The foodstores present within these centres are generally small supermarkets such as Tesco Express or Co-op; however, there is a large Morrisons store in Cambourne (2,700 sqm net convenience floorspace) and a large Tesco Extra at Bar Hill (4,000 sqm net convenience floorspace).

4.57 As such, there is considerable variation in the both the size and range of shops and services on offer in the Local Centres surrounding North West Cambridge. The Local Centres serve only their immediate residential areas, whilst some of the larger Local Centres also cater for pass by traffic. Only the Aldi at Histon

Road attracts trade from a wider catchment, perhaps due to its market appeal as the only 'deep discounter' within the area.

Existing District Centres

4.58 There is one District Centre located in North West Cambridge – Mitcham's Corner. There are 60 retail units within Mitcham's Corner District Centre, including eight convenience units, totalling just over 550 sqm net floorspace. Whilst this includes a small (200 sqm net) Co-op store, there are no other general foodstores in the centre.

4.59 There are two other District Centres within Cambridge – Mill Road East and Mill Road West. These are larger than Mitcham's Corner, with 73 and 85 retail units respectively and with 8 and 13 convenience units. However, there are no main foodstores in these District Centres, with only smaller food stores such as Co-op, Londis and Tesco Express.

Urban Expansion Comparators

4.60 It is also relevant to consider (briefly) the level of convenience and other shopping provision secured in other urban expansion areas, notwithstanding that no two locations are exactly alike in the influences on their provision. The neighbourhood or district centre provision in new towns such as Peterborough or Harlow might be considered too. Here, we simply identify three urban expansion areas at Great Notley (Braintree) Poundbury (Dorchester) and Upton (Northampton), and the new town at Cambourne.

4.61 We briefly describe each expanded/new settlement and the level of retail provision, focusing on the convenience shopping provided in our Comparator Centres note (in Appendix 6). This highlights that a large foodstore and a small number of small A1-A5 shop units are provided in these new centres, thereby confirming the appropriateness of the retail provision assessed in this Study.

2021 Provision Review

4.62 We have identified qualitative and quantitative retail need for 'main' foodstore provision within North West Cambridge by 2021 (See paras 3.87 to 3.95). This needs to be of a sufficient size in order to compete effectively with existing foodstores in the area surrounding North West Cambridge, and to stem the current high levels of trade outflow from North West Cambridge, thus reducing the propensity for people to travel some distance to undertake main food shopping.

4.63 However, a store of this size would not be compatible with the 'Local Centre' role and function, both in terms of the PPS4 and Local Plan definitions of a Local Centre, nor in terms of the scale of retail provision and function of other Local Centres within the City. As such, we recommend that the scale of any 'local' centre in which a superstore or a large supermarket is provided is treated as an exception to the defined role and function as it would be inappropriate to consider any change to the retail hierarchy through this Study and in other respects it will be of the character of a local centre (i.e. the number and type of other units),.

4.64 This is reinforced by the review of other Local Centres in North West Cambridge, with the maximum convenience provision in the centres we surveyed totalling 1,650 sqm net convenience floorspace (at Histon Road Local Centre). Whilst there are larger foodstores within two of the centres in villages in South Cambridgeshire (Cambourne and Bar Hill), these are not considered to be directly comparable to a Local Centre within the Cambridge urban area.

4.65 In determining which floorspace configuration we will use as a basis for comparing the three locations in the following chapter, we review the size of the main foodstore(s) and the total level of convenience floorspace which would be provided in the centres under the four options.

Table 4-6: Summary of Floorspace Options

Option	Main Foodstore	Local Centres
1	2,500 sqm net convenience: at lower end of foodstores in Cambridge.	Two Local Centres & one large one.
2	3,000 sqm net convenience: at upper end of foodstores in Cambridge.	Two Local Centres & one large one.
3	Up to 1,150 sq m net convenience at Orchard Park, 1,300 sq m net at NIAB and 1,700 sq m net at NW AAP (University). At lower end of scale, may not compete with other foodstores in Cambridge.	Three larger Local Centres.
4	At two of the three centres, up to 1,600 sq m net convenience at Orchard Park, 1,750 sq m net at NIAB and 2,000 sq m net at NW AAP (University). At lower end of scale, may not compete with other foodstores in Cambridge	Two larger Local Centres and one smaller one.

4.66 Option 1 providing a superstore of 2,500 sqm net convenience floorspace would also result in deficit of expenditure if all pipeline development comes forward at a higher sales density, but less of a deficit than Option 2. It should be noted, however, that our analysis of all the Options is based on a cautious market share approach and assumes a high sales density (£12,400 sqm net in 2021) for the new main foodstore. If the main foodstore is not occupied by one of the top five main foodstore operators, the sales density may be lower, increasing the available expenditure that could be directed towards the other two centres.

4.67 Option 2, assesses the scope for a superstore of 3,000 sqm net convenience floorspace, at the upper end of main foodstores in Cambridge. Our analysis indicates that if a main foodstore of this size was to come forward, there would not be capacity for the committed/pipeline developments in the other two centres, if occupied by foodstore operators with a higher sales density (£10,000 sqm net) – e.g. Tesco or Sainsbury's irrespective of size and format.

4.68 Options 3 and 4 would result in supermarkets, which would not be of a scale to fully satisfy the qualitative need for main food shopping and to fully compete with the existing main foodstores in the City and are thus likely to be less attractive commercially. However, it is possible that the market could respond by providing large supermarkets of around 2,000 sqm net, given the recent trend to be more flexible over the size of provision. In this respect, we consider Option 4 to be more likely than Option 3.

4.69 Option 1 and (the output to) Option 4 are considered the most appropriate. Option 1 because it would provide:

- i the 'best fit' in terms of meeting the qualitative need for a main foodstore and the quantitative need for convenience retail floorspace – i.e. at 2021, there is sufficient capacity to support a 2,500 sqm net convenience main foodstore in one larger Local Centre, and smaller supermarkets (pipeline/committed development) in the two other Local Centres (assuming one or both with a lower sales density of around £5,000 per sqm net), and a supporting range of convenience shops in each centre.
- ii a larger local centre to meet the wider shopping needs of North West Cambridge, including the qualitative need for a main foodstore, as well as meeting the local shopping needs of each development site through smaller scale supermarket provision.
- iii a superstore of 2,500 sqm net convenience floorspace (approx. 3,570 sqm net retail floorspace), an appropriate size to compete effectively with other main foodstores in the City and result in sustainability benefits (by reducing the propensity for the existing and new population of North West Cambridge to travel elsewhere in the City or beyond, in order to undertake main food shopping).

4.70 Option 4 because it would provide two large supermarkets around 1,500 sq m net convenience floorspace (2,000 sqm net) in two of the three local centres which would:

- i provide an alternative means to using the capacity to contribute meeting the qualitative needs, if recent trends were to lead to retailer interest in two such sized stores in this location, offering new formats providing a point of difference to the current superstores – such stores are more likely if operated by one of the existing food retailers in Cambridge so as to complement their existing provision.
- ii meet much (but not all) of the main food shopping needs of each urban expansion area and the nearby parts of north west Cambridge with stores closer in size to that contemplated in local centres.

iii as a consequence, be likely to lead to more localised shopping trips throughout north west Cambridge, albeit some less frequent trips are likely to be made to the superstores in order to access the full grocery shopping offer.

iv lead to a more balanced provision of foodstores in the three local centres, with no one centre dominant but with two local centres anchored by a large supermarket and the third by a smaller supermarket.

4.71 Finally, whatever the provision made:

i There will always be a considerable outflow of spending to nearby stores; and

ii It will always be desirable not to plan to absorb all expenditure capacity over the next 11 years (up to 2021), given the need to allow for the different sales densities of new floorspace and to have some flexibility to accommodate additional small scale provision in other centres if there is commercial demand.

Main Foodstore Provision by 2011

4.72 We have also been asked to consider at what stage the qualitative need and quantitative capacity might be met through the provision of a single main foodstore in North West Cambridge and to comment, in particular, on what size of store could be accommodated if provision is made in 2011. Accordingly, we have assessed (in Appendix 5) the maximum residual turnover at 2011 arising from:

- A 2,500 sq m net convenience main foodstore in one centre at constant market shares (Table 1a, Appendix 5) to establish the baseline position;
- A 2,500 sq m net convenience main foodstore in one centre at the increased market shares envisaged (Table 1b);
- A 1,500 sq m net convenience supermarket in one centre at the same increased market shares (Table 1c).

4.73 We selected these two sizes to reflect the store sizes tested in Option 1 and derived from Option 4 above, testing whether there is sufficient capacity to support one or both at 2011.

4.74 Our assessment, based on our anticipated market share increases and set out in Appendix 5, finds that:

- If a store of 2,500 sq m net convenience floorspace is introduced at 2011 (at constant market share), there is a significant residual turnover deficit ranging from -£36.7 m to -£55.6 m, depending on the operator type and which centre it might be located (Table 1a).

- If a store of 2,500 sq m net convenience floorspace is introduced at 2011 (at increased market shares), there is a residual turnover deficit ranging from –£4.8.m to -£23.7m, depending on the operator type and which centre it might be located (Table 1b).
- If a store of 1,500 sq m net convenience floorspace is introduced at 2011 (at increased market shares):
    - There is surplus capacity ranging from £2.7m to £7.2m, if the committed/pipeline floorspace in the other two centres trades at a sales density of £5,000 per sq m (the actual amount is dependent on which centre the store is located).
    - There is a residual turnover deficit ranging from -£2.9 m to -£11.7 m if the committed/pipeline floorspace in the other two centres trades at a sales density of £10,000 per sq m (the actual amount is dependent on which centre the store is located).

4.75 On this basis, the 1,500 sq m net convenience floorspace store trading at a top main foodstore sales density could proceed at one of the centres, whilst leaving sufficient capacity for discount or smaller supermarket operators to absorb the committed/pipeline floorspace at the other two local centres.

4.76 We comment on the potential early delivery of a main foodstore at one of the centres is as follows:

- A 2,500 sq metre net convenience floorspace superstore at 2011 absorbs all the residual expenditure and more and, as a consequence, is likely to delay the date at which smaller foodstore convenience floorspace is delivered in the other two local centres until there is additional capacity.
- There is scope to accommodate 1,500 sq m net convenience floorspace supermarket at 2011, whilst leaving retail development potential for the committed/pipeline developments, but such a store is not at a sufficient size to fully compete with the existing Cambridge superstores.
- The primary need for a main foodstore arises from the retail needs of the existing population, with that need being increased as the population expands as a consequence of the new residential developments.
- The introduction of new "Local Centres", in areas of significant population growth, provides an appropriate opportunity to meet the needs of both existing and new populations and provide the required focal point for the planned new centres.
- There is merit in linking both the size of the foodstore and retail provision in the other local centres to the residential phasing of the development sites, although the size of the foodstore is primarily driven by the retail needs of the existing population.

4.77 A supermarket of 1,500 sq m net convenience goods floorspace is likely to have 500 square metres comparison goods floorspace giving rise to a 2,000 sq m net sales area store. This store, with capability to extend the net floorspace at a later date, would be the appropriate scale and nature of retail provision at 2011. This would provide a store capable of meeting some but not all the main food shopping needs in North West Cambridge in the short term, leaving either an extension to 2,500 sq m convenience floorspace (3,500 sq m net sales area) store to be secured through expansion at a later date in the development of the North West Cambridge development sites or alternatively, a similar sized store to emerge later in one of the other Local Centres, would satisfy these future needs.

4.78 We therefore recommend that the Councils make provision for a c. 2,000 sq m net supermarket (1,500 sq m net convenience) in the early years. This store should be planned to have expansion capability to deliver 2,500 sq m net convenience in a 3,500 sq m net foodstore at a later date following a sizeable increase in the catchment population and expenditure available. This should still allow for smaller supermarkets to proceed in the other Local Centre locations, albeit probably smaller than that presently envisaged. Alternatively, the future need might be capable of being met to a large extent by a similar sized second store (i.e. 2,000 sqm net) in another Local Centre if there proves to be such commercial demand.

4.79 A phased delivery of convenience floorspace provision has occurred as part of a number of urban expansion areas, including Northampton South, Peterborough and Milton Keynes, where the retail provision has grown in response to population growth. Another example is Bradley Stoke, a large urban expansion development to the north of Bristol. In 1988, work started on the commercial and industrial development on the site and, in September 1992, Tesco opened a 2,500 sq m net store as part of the allocated District Centre (known as Willow Brook). By 2005, the housing development (9,000 houses) was nearly complete. As a result, in 2007, Tesco obtained planning permission for the redevelopment of the existing store to provide a 7,400 sq m net Tesco Extra store which opened in October 2008.

Summary

4.80 In the long term, up to 2021, either a single c. 3,500 sqm net superstore or two 2,000 sqm net supermarkets are considered to provide the most appropriate main foodstore provision within the planned Local Centres to meet the quantitative and qualitative foodstore needs of North West Cambridge. However, given the need exists now, provision should be made for a single c.2,000 sqm net supermarket (c.1,500 sq m net convenience floorspace), with the capability to expand in the future, should that option be preferred.

4.81 The next section assesses the relative merits of the three potential Local Centre locations (NW AAP (University) Site, the NIAB Site and Orchard Park) for a single main foodstore.

5.0 Relative Merits of Potential Centre Locations

5.1 In this section, we compare the relative merits of the NW AAP (University) Site, the NIAB Site and Orchard Park, to identify their locational advantages and disadvantages of including a main foodstore irrespective of store size (whether 3,500 sq m net retail superstore or a 2,000 sq m net retail large supermarket). Thus, we provide a comparative assessment of the three Local Centre locations.

5.2 We have sought to examine how the distribution and accessibility of existing foodstores and centres in North West Cambridge may be affected by the introduction of three new centres, one of which would be a larger centre with a main foodstore. We therefore compare the relative merits of the three locations, focusing on:

- the qualitative need for further retail provision, in terms of both the distribution of main foodstores and access to other existing and proposed Local and District Centres within North West Cambridge and beyond (Maps 2, 3, 5, 7, 8 and 9, Appendix 1).
- the accessibility of each proposed centre location by public and private transport, walking and cycling (maps 8, 9, 10 and 11) - this is an initial assessment and detailed transport modelling will be required to test the full transport implications.
- the existing and new population that each centre would serve, by walking, cycling and car (Maps 6, 8, 9 and 12, Appendix 1).
- whether there are any variations in the appropriate nature and scale of convenience provision for each centre location.
- the impact that a new main foodstore would have on both existing retail facilities and centres, and on the other two proposed centres (Maps 2, 3 and 5, Appendix 1).
- the impact on the spatial planning strategy and on other planned retail investment in the area.

5.3 In considering the merits of the three locations, we have focussed on the main foodstore provision. We have not assessed the small shopping provision on a similar basis, as we envisage that whilst the basic provision will be similar for all three Centres, the nature and number of small shops will be influenced by which one or more Local Centres might include the main foodstore provision.

Qualitative Retail Need

5.4 To determine the qualitative retail need for convenience provision in each of the three locations, we consider the following factors:

- The number of convenience stores and larger foodstores within 0.5km walking distance and five minutes drivetime of each site (see Map 8 and 9, Appendix 1).

- The distance and approximate travel time of each site to the nearest 'main' foodstore (see Maps 2 and 3, Appendix 1).
- The proximity of each site to existing Local and District Centres within Cambridge (see Map 5, Appendix 1).

5.5 We also review how a new main foodstore in each of the sites would meet the qualitative needs of the existing population in North West Cambridge and the surrounding villages.

North West AAP (University) Site

5.6 The following seven convenience stores are located within five minutes drivetime of the NW AAP (University) Site:

Table 5-1: Foodstores within Five Minutes Drivetime of NW AAP (University) Site

Size (sqm net)	Centre	Store	Map ref
1,000 to 2,500	City Centre	J Sainsbury	9
500 to 1,000	Histon Road LC	Aldi	12
Less than 500	Histon Road LC	Iceland	17
	Histon Road LC	Co-op	18
	Mitcham's Corner DC	Co-op	22
	n/a	One Stop, Carlton Terrace	19
	n/a	Co-op, Girton Road	21

5.7 The Sainsbury's store in the City Centre is the largest foodstore within five minutes drivetime of the NW AAP (University) Site, at 1,300 sqm net (1,260 sqm net convenience floorspace). However, the traffic and parking restrictions mean that in practice it is not within a 5 minute drive. In any event, given the relatively small store size, it is not expected to provide the full range of convenience and comparison goods typical for a main foodstore.

5.8 The nearest main foodstores to the site are the 4,995 sqm net Tesco store at Cheddars Lane (Newmarket Road) (2,670 sqm net convenience floorspace) and the 3,720 sqm net Asda store at the Beehive Centre (2,600 sqm net convenience floorspace). Both stores are located a distance of approximately 5km and a travel time of 8-10 minutes from the NW AAP (University) Site[10]. However, the GVA Grimley household survey results (see Table 3-2) indicate that this area is primarily served by Tesco Extra at Bar Hill for main food shopping.

5.9 There are three Local Centres within five minutes drivetime of the site: Akeman Street, Histon Road and Victoria Road. Mitcham's Corner District Centre is located on the periphery of the drivetime isochrone. None of these centres is located within 500m walking distance of the NW AAP (University) Site.

[10] Travel time based on RAC Route Planner

NIAB Site

5.10 There are eight convenience stores within five minutes drivetime of the NIAB Site, none of which have a sales area of over 1,000 sqm net.

Table 5-2: Foodstores within Five Minutes Drivetime of NIAB Site

Size (sqm net)	Centre	Store	Map ref
500 to 1,000	Arbury Court LC	Budgens	11
	Histon Road LC	Aldi	12
Less than 500	Arbury Rd / Milton Rd LC	Co-op Welcome	23
	Campkin Road LC	Tesco Express	20
	Histon Road LC	Iceland	17
	Histon Road LC	Co-op	18
	n/a	One Stop, Carlton Terrace	19
	n/a	Co-op, Girton Road	21

5.11 The Tesco stores at Milton and Cheddars Lane (Newmarket Road) are just outside a five minute drivetime. The Tesco at Bar Hill and Asda at the Beehive Centre are the next closest main foodstores; these stores are located a distance of approximately 5km and a travel time of 9-10 minutes from the NIAB Site. The GVA Grimley household survey results indicate that this area is primarily served by Tesco at Milton and Tesco Extra at Bar Hill for main food shopping.

5.12 There are six Local Centres within five minutes drivetime of the NIAB Site: Akeman Street, Arbury Court, Arbury Road / Milton Road, Campkin Road, Histon Road and Victoria Road. In addition, Histon and Impington Rural Centre and Mitcham's Corner District Centre are located just outside the drivetime isochrone. There are no existing centres located within easy walking distance (500m) of the site.

Orchard Park

5.13 Orchard Park is the best served of the three sites by existing convenience stores, with 14 stores within five minutes drivetime isochrone, including one main foodstore; Tesco at Milton.

Table 5-3: Foodstores within Five Minutes Drivetime of Orchard Park

Size (sqm net)	Centre	Store	Map ref
1000 to 2,500	n/a	Tesco, Milton	8
500 to 1,000 +	Arbury Court LC	Budgens	11
	Histon Road LC	Aldi	12
Less than 500	Arbury Rd / Milton Rd LC	Co-op Welcome	23
	Campkin Road LC	Tesco Express	20
	Chesterton High Street LC	Tesco Express	25
	King Hedges Road LC	Co-op	24
	Histon Road LC	Iceland	17
	Histon Road LC	Co-op	18
	Histon & Impington LC	Co-op	26
	Histon & Impington LC	Tesco Express	27

	Mitcham's Corner DC	Co-op	22
	n/a	One Stop, Carlton Terrace	19
	n/a	Co-op, Girton Road	21

5.14 The closest main foodstore is Tesco at Milton (2,250 sqm net convenience), located around 4km from Orchard Park, at a travel time of around 5 minutes. The larger foodstores of Tesco, Cheddars Lane and Asda, Beehive Centre are located about 4km (8-10 minutes) from the site.

5.15 Orchard Park is also the best served site in terms of nearby centres, with nine Local Centres, Histon and Impington Rural Centre and Mitcham's Corner District Centre all within five minutes drivetime of the development site. The Local Centres are Akeman Street, Arbury Court, Arbury Road / Milton Road, Campkin Road, Chesterton High Street, Green End Road, Histon Road, King Hedges Road and Victoria Road. Despite the high number of centres within easy driving distance of Orchard Park, no centres are located within 500m walking distance of the site.

Qualitative Convenience Needs of Existing Population

5.16 The existing District and Local Centres are not evenly distributed throughout Cambridge (see Map 5, Appendix 1). To the north of the City Centre, the existing centres are concentrated in the central and eastern part of the City, with no centres to the west of Histon Road. As such, the existing population on the north western side of the City is not well served by existing centres.

5.17 Likewise, the existing population located on the western most side of Cambridge is not well served by existing convenience stores or main foodstores; there are no stores within the City boundary in the area to the west of Histon Road (B1049) and Queens Road (A1134) and to the north of Barton Road (A603). The existing population on the western side of Cambridge would therefore benefit from a new foodstore.

5.18 The existing population to the north of Cambridge is better served by existing foodstores, in particular Tesco at Milton. This part of Cambridge also has better access to smaller stores (less than 1,000 sqm net) and to existing centres.

5.19 With regards to the surrounding villages, the main food shopping needs of Girton residents are currently served by the Tesco Extra at Bar Hill, although a new main foodstore at the NW AAP (University), NIAB or Orchard Park Sites would be the nearest foodstore for this population. Likewise, whilst the population of Histon and Impington are currently served by Tesco at Milton, a new main foodstore at the Orchard Park or NIAB Site would be more easily accessible to these residents. These settlements are all likely to be served to some extent by the proposed foodstore and other retail development at Northstowe.

5.20 The small villages to the west of Cambridge along the A1303 and A428 (e.g. Coton and Hardwick) are currently primarily served by Morrisons at Cambourne and Tesco Extra at Bar Hill. A new foodstore on the NW AAP (University) Site would serve those villages – such as Coton – located closest to Cambridge.

5.21 On this basis, the qualitative needs of the existing population that would be easily served by a new foodstore at either the NW AAP (University) or NIAB Sites exceed those of the existing population that would be served by a new foodstore at Orchard Park.

Accessibility

5.22 We have compared the three centre locations in terms of their accessibility by public and private transport, on foot and by bicycle. This is done on the basis of both the current provision and the expected future accessibility of the three centres once the development sites have been completed (see Map 9 for Walking and Cycling Distances, Map 10 for Cambridge Cycle Routes, Map 11 for Cambridge Bus Services, and Map 12 for the Cambridge Guided Busway). We utilise information available within the planning application and policy documents to consider the future levels of accessibility.

Table 5-4: Accessibility of Proposed Centre at NW AAP (University) Site

Criteria	Current Accessibility	Proposed Accessibility*
Private Vehicle	The site is situated between Huntingdon Road (A1307) and Madingley Road (A1303), providing access elsewhere in the City via the Cambridge Ring Road, which surrounds the City Centre, as well as to other towns north west of Cambridge. Access to the A14 is provided via Huntingdon Road and to M11 via Madingley Road. The site is accessible from most of north-west Cambridge within a 5 minute drivetime.	The site will be accessed from Huntingdon Road and Madingley Road, with a new route linking the two. The site will therefore be well linked into the existing road network. The design of the new road link will be based on low vehicle speeds and it will give priority to provision for walking, cycling and public transport, including safe and convenient crossings for pedestrians and cyclists, in order to encourage travel by more sustainable modes. The design of the junction at Huntingdon Road must be capable of linking satisfactorily with the proposed route from Huntingdon Road to the B1049 (Histon Road/Cambridge Road) to ensure the wider transport benefits are achieved
Public Transport	Huntingdon Road and Madingley Road operate as main bus arteries out of the City, with over ten 'frequent' services (operating more than once an hour), and several less frequent and long distance coach services passing the site. These services provide access into the City Centre as well as to towns and villages on the routes to Huntingdon, St. Ives, St. Neots,	Huntingdon Road to Madingley Road link is to be a segregated bus priority routes though the development. It will also link with the public transport route through the NIAB Site linking to the wider bus network.

	Bedford, Cambourne and Papworth. There is also a Park and Ride service on Madingley Road providing a service every 10 minutes during the day.	
Walking and Cycling	The site is linked to a number of off-road cycling routes that connect to Cambridge City Centre and Coton, Hardwick and Madingley.	New and improved walking and cycle links will be provided to adjacent existing and proposed development and to the City Centre, and walking and cycling routes within the development site will connect key destinations, including the Local Centre and bus stops. The development will also be connected with the surrounding walking network, cycling network and orbital routes including links to an improved rights of way network and to nearby villages and open countryside.

* Based on North West Cambridge Area Action Plan (October 2009) and Inspectors Report (August 2009).

5.23 The NW AAP (University) Site has very good levels of accessibility at the current time via a range of means of transport. Huntingdon Road and Madingley Road provide good road access into the City Centre and elsewhere in Cambridge via the Cambridge Ring Road, as well as to other towns and villages to the north west of Cambridge. The site is currently served by a number of bus routes and is directly connected to the City Centre by off-road cycling routes.

5.24 A number of measures are proposed within the AAP to improve the transport accessibility of the site, with a particular focus on walking, cycling and public transport. On this basis we consider the proposed Local Centre within the NW AAP (University) Site will be easily accessible from the rest of North West Cambridge and beyond via a range of means of transport, with the Madingley Road/Huntingdon Road link being designed for low vehicle speeds (Policy NW14 of NWC AAP).

Table 5-5: Accessibility of Proposed Centre at NIAB Site

Criteria	Current Accessibility	Proposed Accessibility*
Private Vehicle	Situated between Huntingdon Road (A1307) and Histon Road (B1049), providing access elsewhere in the City via the Cambridge Ring Road, which surrounds the City Centre. These roads also provide access to the A14 and thence the M11, providing access out of Cambridge. Most of north and part of the western side of Cambridge are accessible within a five minute drivetime	The main vehicular access will be from Huntington Road and Histon Road. Access will be provided via new signal controlled junctions to accommodate the forecast increase in demand onto the local highway network and to provide priority for the proposed Guided Bus route and other bus services. A link road from Huntingdon Road to the B1049 (Histon Road/Cambridge Road) is proposed within the North West Cambridge AAP (para.6.8 and Figure 6.1)

Public Transport	Huntingdon Road acts as a major bus artery, with six 'frequent' services (operating more than once an hour), and several more less frequent services passing the site. A further two services operate on Histon Road currently at a ten minute frequency. These services provide access into the City Centre, as well as to towns and villages on the routes to Huntingdon, St Ives, Cottenham and Ely.	The scheme will give priority to public transport links between Histon Road and Huntingdon Road. The intention is to strengthen and expand public transport along Huntingdon Road and Histon Road with potential opportunity for bus stops within the development linking with the Cambridgeshire Guided Busway (CGB).
Walking and Cycling	The site is currently not located within close proximity to any off-road cycling routes. Cyclists accessing the current site are required to use main roads.	The scheme will give priority to walking and cycling within the development and link the development with the surrounding walking and cycling network and orbital routes

* Based on pending planning application LPA ref: S/0001/2007 and accompanying documents.

5.25 The NIAB Site has good levels of accessibility by private vehicle and is close to bus routes along Huntingdon Road and Histon Road.

5.26 However, it is currently not well linked to the Cambridge cycle network with cyclists being forced to use main roads to access the site. The supporting documentation provided with the current outline planning application for the proposed development indicate that public transport, walking and cycling links will be improved. The site is currently well connected to much of North West Cambridge and beyond via public and private transport, and whilst cycling and walking routes are currently via main roads, these will be improved as part of the development.

Table 5-6: Accessibility of Proposed Centre at Orchard Park

Criteria	Current Accessibility	Proposed Accessibility*
Private Vehicle	The site is located adjacent to Histon Road (B1049) which provides access elsewhere in the City via the Cambridge Ring Road, which surrounds the City Centre. The site lies close to the A14 which provides good access to the M11 and towns east and west of Cambridge. Much of north Cambridge and part of north-east Cambridge, as well as Histon and Impington, are accessible within a five minute drivetime.	Access to the site is provided from King's Hedges Road, which links to Histon Road to the west (to the northern of the anticipated Huntingdon Road to Histon Road link) and Milton Road (A1039) to the east. The suitability of the existing access for the scale of retail will need to be considered.
Public	The site is directly accessed by one	The Citi 4 bus service will run

Transport	bus route, which provides services into the City Centre. Two further bus routes operate along Histon Road, providing access into the City Centre and to towns and villages on the routes to Cottenham and Ely.	through the site, as at present. The site will be served by the Cambridgeshire Guided Busway (CGB) connecting to Cambridge Science Park which is under construction. Two bus stops will serve Orchard Park with a dedicated route running along the southern side of the site, adjacent to King's Hedges Road.
Walking and Cycling	Several off-road cycling routes run close to the site, providing links to Impington, Histon and north Cambridge. Cycling routes to Cambridge City Centre are via main roads.	Increased provision for cycle/ pedestrian infrastructure is to be provided as part of the Histon Interchange Highway Works. There will be a cycle route alongside the CGB under the A14 to the eastern end of the site.

* Based on outline planning permission LPA ref: S/2379/01/O.

5.27 The site has good road access into the City centre and out of Cambridge and is currently directly served by one bus service. Pedestrian and cycle links to the surrounding area will be improved. The site has good accessibility to north Cambridge by a range of means of transport, but is less well connected to west Cambridge.

Catchment Populations by Travel Mode

5.28 To determine the appropriate level of convenience provision for each centre, we seek to estimate the extent of the local catchment areas and thus the population that a new foodstore would serve, in each of the three locations. We have calculated both the local 'walking population', within a 500m radius of each centre, the cycling population within a 2km radius of the site, and the population within a five minute drivetime of each centre.

5.29 The 500m / 2km radii and the 5 minute drivetime isochrones have been created using the Experian MMG3 system. The drivetime isochrones are shown on Map 8, whilst the walking and cycling catchments are shown on Map 9 in Appendix 1. In addition, Map 13 in Appendix 1 (an extract from the Cambridge City Local Plan 2006 Proposals Map) assists in identifying the relationship between the residential areas, the road network and accessibility.

5.30 It should be noted that the drivetime isochrones do not fully represent the area expected to be covered when the three developments are completed, as new roads will be constructed as part of the developments. The proposed Local Centres at the NW AAP (University) and NIAB Sites are not located close to existing roads and whilst the Local Centre at Orchard Park with planning permission is situated close to the existing road network, if a main foodstore was provided in the south west corner of the site, the local centre may relocate to it. A drivetime isochrone from these locations would therefore not be realistic as it would use much of the five minute drivetime travelling at 'off road' speeds to access the road network. As such, we have used alternative start points (marked X on Map 8) adjacent to the existing roads for these drivetime isochrones, to take account of this fact. The alternative start points for the drivetime isochrones affect the catchment populations, but not significantly so for relative comparison purposes.

5.31 It should also be noted that the isochrones are calculated on the basis of road types and speeds. This has resulted in the 5 minute drivetime isochrone for Orchard Park extending noticeably further to the east than for the NIAB site, despite there only being a relatively small distance between the two ‘X’ startpoints on Kings Hedges Road and Cambridge Road. This results from the way the programme calculates the negotiation of the Cambridge Road/ Kings Hedges Road junction by vehicles leaving the NIAB site. In reality, we consider the Orchard Park isochrone would be similar in shape to the NIAB isochrone, as is exhibited along the B1049, A14 and A10 in the northern part of Map 8. Whilst this will affect the actual existing catchment populations, we do not consider this to be significantly so for relative comparison purposes.

5.32 The Local Centre at the NW AAP (University) Site will be accessed by a new road link between Madingley Road and Huntingdon Road, and the Local Centre at the NIAB Site will be accessed by a new road link between Huntingdon Road and Histon Road (as set out in the NW AAP and the documentation accompanying the NIAB planning application).

5.33 The existing population within the walking / cycling radii and drivetime isochrones is calculated from Experian’s MMG3 Retail Planner Population Projections. To determine the extent of the new population at the three development sites (9,020 at NW AAP (University) Site, 6,740 at NIAB and NIAB Extra, and 2,620 at Orchard Park[11]) which could be served by the three potential centre locations, we have considered the proportion of each site which is covered by the walking and cycling radii and drivetime isochrones for each centre, taking account of the broad land use distribution within the sites – i.e. the expected location of the residential development, compared to the areas of open space.

Walking

5.34 The area covered within a 500m walking radius of each centre location is shown on Map 9.

[11] Part of the Orchard Park development has already been completed. For this analysis, all the development is regarded as new population,

Table 5-7: Population within 500m Walking Distance of Proposed Centres, 2021

Development Site ↓	New Population	Centre Location		
		NW AAP (University) Site	NIAB Site	Orchard Park
NW AAP (University) Site	9,020	50%	0%	0%
NIAB Site	6,740	0%	65%	0%
Orchard Park	2,620	0%	0%	75%
New Population: Sub total		**4,510**	**4,381**	**1,965**
Existing Population		**111**	**699**	**1,085**
Total Population		**4,621**	**5,080**	**3,050**

5.35 Given the size of the development sites, each of the proposed new centres would only serve a proportion of their own development site, and none of the other sites, within a 500m walking radius of the centre location. Thus the proposed centre at the NW AAP (University) Site would serve the greatest new population, given that this site is expected to accommodate the highest number of new dwellings. However, as the centre is to be located centrally within the site, which is not built up at present, the proposed centre would serve a very low existing population within easy walking distance.

5.36 The proposed centre at Orchard Park would serve the greatest existing population, as it is located on the edge of the existing built up area, but would serve the lowest new and combined population, as the number of proposed dwellings is lower at Orchard Park than the other two sites.

5.37 If a large supermarket or a superstore is located at Orchard Park, the local centre will be relocated to the south west corner of the site (See Map 6, Appendix 1). As the centre would be closer to the existing built up area it would serve a larger existing population (approx. 1,700), however, it would still serve the lowest new and combined population.

5.38 The proposed NIAB Site would serve the greatest total existing and new population – around 5,000 people – within a 500m walking distance.

Cycling

5.39 The area covered within a 2km cycling radius of each centre location is shown on Map 9.

Table 5-8: Population within 2km Cycling Distance of Proposed Centres, 2021

Development Site ↓	New Population	Centre Location		
		NW AAP (University) Site	NIAB Site	Orchard Park
NW AAP (University) Site	9,020	100%	100%	10%
NIAB Site	6,740	100%	100%	100%
Orchard Park	2,620	0%	75%	100%
New Population: Sub total		**15,760**	**17,725**	**10,262**

Existing Population		**19,004**	**35,383**	**35,186**
Total Population		**34,764**	**53,108**	**45,448**

5.40 The three sites would each serve a fairly extensive area within a 2km cycling radius of the centre locations, with each centre serving as a minimum their own development site and one other whole development site. A centre at the NIAB Site, being centrally located between the three sites, would serve the greatest new population.

5.41 A new centre at the NIAB Site and Orchard Park would serve a greater existing population than the NW AAP (University) Site within a 2km cycling radius, as these two sites are located closer to the existing built up area than the NW AAP (University) Site, which is surrounded by more open space (see Map 6, Appendix 1).

5.42 The NIAB Site would therefore serve the greatest total new and existing population within easy cycle distance, due to its central location between the development sites and in relation to the built up area of Cambridge.

5.43 As indicated above, if a large supermarket or a superstore is located at Orchard Park, the local centre will be relocated to the south west corner of the site (See Map 6, Appendix 1). As the centre would be closer to the existing built up area and would serve a larger existing population with a 2 km cycling radius (approx. 38,400). However, the combined existing and new population (48,662) would still be lower than at the NIAB Site.

Drivetime Isochrone

5.44 The area covered within a five minute drivetime isochrone of each centre location is shown on Map 8.

Table 5-9: Population within 5 Minutes Drivetime of Proposed Centres, 2021

Development Site ↓	**New Population**	**Centre Location**		
		NW AAP (University) Site	**NIAB Site**	**Orchard Park**
NW AAP (University) Site	9,020	100%	90%	0%
NIAB Site	6,740	50%	100%	35%
Orchard Park	2,620	0%	100%	100%
New Population: Sub total		**12,390**	**17,478**	**4,979**
Existing Population		**30,475**	**40,361**	**58,499**
Total Population		**42,865**	**57,839**	**63,478**

5.45 The proposed centre at the NIAB Site would serve the greatest new population, due to its central location, which means that the majority of the proposed residential areas of the three development sites can be accessed within a five minute drivetime from the centre at NIAB Site.

5.46 The proposed centre at Orchard Park would serve the greatest existing population, as much of the population living within north Cambridge could access the centre within five minutes drivetime, together with the population living within Histon, Impington and the outskirts of Milton. The proposed centre at the NIAB Site would serve the existing population of North West Cambridge, to the north of Madingley Road, as well as Histon. Much of the area within five minutes drivetime of the NW AAP (University) Site is open space, rather than built up areas (see Map 6), resulting in a centre at this site serving the lowest existing population.

5.47 Whilst a centre at Orchard Park would serve the lowest new population, it would serve the greatest total population within five minutes drivetime, due to the considerably higher existing population served by this site than the other two centre locations (albeit Orchard Park is the best served of the three sites by existing convenience stores) and the only one within a 5 minute drive of a main foodstore (Tesco, Milton).

Summary

5.48 The above analysis indicates that there is a qualitative need for additional local convenience provision in all locations, as none of the three development sites contain existing food stores within the site boundary, or within a 500m radius of the location of the proposed new centres.

5.49 A new centre at the NIAB Site would serve the greatest total population within an easy walking and cycling distance, whilst Orchard Park would serve the greatest population within a five minute drivetime isochrone.

Trading Impact

5.50 To assist in determining the most appropriate location for a new main foodstore, we have assessed the relative trading impacts on existing foodstores and the qualitative impact on other centres, including the likely effect of a new main foodstore on the delivery of viable local centres at the other two sites.

5.51 Firstly, we have assessed the potential impact of a new main foodstore at the three centre locations on existing foodstores. We consider that a main foodstore is likely to primarily impact on other similar foodstore facilities, as people change their main food shopping destinations. The impact may be dispersed due in part to the number of existing stores from which trade would be drawn. However, we consider that the location of the proposed new foodstore would result in some variation in the impact on existing stores, both in terms of which existing stores are affected, and the extent of the impact anticipated.

5.52 As such, for each of the three potential locations, we consider the main existing facilities from which we expect trade to be drawn, and review broadly the level of trade diversion which might be expected, in relative terms.

5.53 We have made judgements as to the broad level of trade diversion from existing foodstores to a new main foodstore, based upon the size and proximity of existing stores to the three potential foodstore locations, and existing food shopping patterns, as set out in the GVA Grimley 2008 household survey results (Q1 and Q5, broken down to postal sector level). The stores under 500 sq m net have been excluded as they predominantly have a different top-up role which means trade diversion from them to a large foodstore will be limited.

5.54 Table 5-10 below sets out the relative level of trade diversion predicted from existing stores (e.g. Tesco Extra, Bar Hill and Tesco, Milton) to a proposed new main foodstore in one of the three centre locations. Most trade will be drawn from these existing main foodstores outside the PCA as this is where most people are undertaking their main food shopping at present (See Table 3-2). Due to the lack of main foodstore facilities in North West Cambridge, we would expect some trade diversion from the smaller stores which are currently performing a main food shopping role for some residents.

5.55 The table also includes an indication of the (household survey derived) trading performance of the existing stores in relation to the company average trading levels, as derived from our update to the CS-R RS (Tables 5 ,7 ,9 ,11, 13 and 14 in Appendix 2b.)

Table 5-10: Estimated Levels of Trade Diversion from Existing Stores (500 sq m +)

	NW AAP (University)	NIAB	Orchard Park	Performance relative to company average
Larger Foodstores (1,000 sq m +)				
Asda, Beehive Centre	Low	Low	Low	↓↓
Morrisons, Cambourne	Low	-	-	↓
Sainsbury's, Coldhams Ln	Medium	Medium	Medium	↑
Sainsbury's, Sidney St	Medium	Low-Medium	Low-Medium	↑
Tesco Extra, Bar Hill	High	High	High	↑
Tesco, Cheddars Lane	Medium	Medium	Medium	↓
Tesco, Milton	High	High	Very High	↑↑
Waitrose, Trumpington	Medium	Low	Low	↑
Foodstores (500-1,000 sq m)				
Aldi, Histon Road	Low	Low-Medium	Low	↑↑↑
Budgens, Arbury Road	Low	Low-Medium	Low/Medium	↑

5.56 A main foodstore on any of the sites is expected to draw the highest proportion of its trade from Tesco stores at Bar Hill and Milton. The Bar Hill store is trading slightly above its company average benchmark level, with the Milton store trading considerably above benchmark level. We would not expect the viability of either strongly performing store to be threatened as a consequence of a new main foodstore; indeed, such a store would help relieve overtrading, particularly the Milton Tesco store.

5.57 The NIAB Site is expected to draw more trade from the smaller foodstores or convenience stores; this is largely due to the proximity to the proposed NIAB Local Centre of several small convenience stores which are currently used for some main food shopping trips. However, the stores affected are all shown to be overtrading in relation to their benchmark levels.

5.58 In relation to the poorly performing stores, the level of trade diversion is generally expected to be low, with the exception of Tesco, Cheddars Lane, from which a store at any site would divert a medium level of trade.

5.59 We would not expect the trading impact of a main foodstore in any of the three locations to result in the closure of an existing store.

Qualitative Impacts

5.60 In addition to the trading impact, we have reviewed the positive and negative qualitative impact considerations that may arise from the development of a main foodstore in one of the three development sites, using the impact criteria set out in PPS4 (Policy EC.16.1), including:

- the impact on town centre vitality and viability, including local consumer choice and the range and quality of the convenience retail offer.
- if located in or on the edge of a town centre, whether the proposal is of an appropriate scale (in terms of gross floorspace) in relation to the size of the centre and its role in the hierarchy of centres.
- the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal.

Impact on Town Centre Vitality and Viability

5.61 The potential impact of a main foodstore on the vitality and viability of existing centres (identified on maps) is linked to the expected trade diversion from existing facilities. The foodstores from which trade is expected to be diverted are set out in Table 5-10 above. Most of the foodstores identified are located out-of-centre: Asda, Beehive Centre; Sainsbury's, Coldham Lane; Tesco Extra, Bar Hill; Tesco, Cheddars Lane; Tesco, Milton; and Waitrose, Trumpington. Tesco Extra in Bar Hill village centre is treated as an out-of-centre store in the GVA study.

5.62 The stores located within existing centres which are expected to be impacted by a new main foodstore in North West Cambridge are located in Cambourne Rural Centre (Morrisons), Histon and Impington Rural Centre (Tesco Express) and Histon Road Local Centre (Aldi and Co-op).

5.63 A health check of these centres was undertaken by GVA Grimley for the 2008 CS-R RS (Appendices 3 and 4), which found that:

- Cambourne Rural Centre is a new village lying approximately eight miles to the west of Cambridge which serves a planned housing development. Cambourne is still expanding and there are outstanding retail permissions which have not yet been implemented. The centre has a good range of uses and is anchored by a modern Morrisons foodstore. There are two retail developments adjoining Morrisons, which comprise a high proportion of retail service uses.
- Histon and Impington Rural Centre consists of two village centres that have gradually merged into one larger centre. As a result there are clusters of retail uses in each centre both with a convenience anchor; Histon by a modern Tesco Express store and Impington by a Co-op. There is also a range of other retailers and a good range of local services in both parts of the centre.
- Histon Road Local Centre: The centre is well positioned on the busy Histon Road which links the city centre to the A14. The centre is anchored by key retailers Aldi, Co-op and Iceland, and the precinct to the north supports an overall good range of products and services. There is good provision of parking and it is easy for passers by to stop on their way through. The aesthetic qualities of the centre could be improved, but in general it appears to be functioning well and there are no vacant units.

5.64 The health checks indicate that both Histon and Impington Rural Centre and Histon Road Local Centre are vital and viable centres which provide a local shopping function with a range of convenience shops and retail services.

5.65 There is little variation between locating a main foodstore in any of the three centres in terms of their potential impact on these local and rural centres.

5.66 Table 5-10 indicates that a new main foodstore in all three locations would impact on Histon Road, with the highest level of impact expected from a foodstore at the NIAB Site. The health check indicates that Histon Road Local Centre is a vital and viable centre which provides a local shopping function with a range of shops and retail services. Furthermore, the stores in that centre (Aldi, Co-op and Iceland) which are predicted to be impacted by a new main foodstore are currently performing above their benchmark level, and the relatively limited level of predicted trade diversion is not considered to have an adverse impact on the vitality and viability of the centre.

5.67 A new main foodstore at the NW AAP (University) Site is the only location expected to impact on Cambourne Rural Centre. This is a new purpose built centre anchored by a larger foodstore, and whilst it is still expanding (there is significantly more housing to be built) and therefore is yet to fulfil its potential, the centre appears to be relatively vital and viable. Although the level of predicted trade diversion is low, Morrisons at Cambourne is currently trading below its benchmark level. Whilst a new main foodstore at the NW AAP (University) Site could therefore further impact on Morrisons trading performance, it is not expected to adversely affect the vitality and viability of

Cambourne Rural Centre, as the level of trade diversion is low and the centre is still expanding.

5.68 Conversely, a new main foodstore at either the NIAB Site or Orchard Park is expected to impact on Histon and Impington Rural Centre; however in both cases the level of predicted trade diversion is low, and the store expected to be impacted (Tesco Express) is performing above the company average benchmark level. A new main foodstore at the NIAB Site or Orchard Park is therefore not expected to have an adverse impact on the vitality and viability of Histon and Impington Rural Centre.

5.69 A new main foodstore is not expected to have a significant adverse impact on the vitality and viability of any existing centre. We would also not expect that a new main foodstore in any of the three locations will have an adverse impact on local consumer choice, in terms of the range and quality of the existing convenience retail offer.

5.70 A new main foodstore is expected to have a positive impact on local consumer choice and convenience retail diversity in the centre within which it is ultimately located. Qualitative retail need has been considered in paras. 5.4 to 5.21 above. This indicated that Orchard Park is currently best served by existing convenience stores, whilst the NW AAP (University) Site is the least well served. The positive impacts of a new main foodstore may therefore be greatest at the NW AAP (University) Site, where there is the greatest need for access to foodstores.

Scale relative to Centre Role in Retail Hierarchy

5.71 Our review of the configuration of new convenience floorspace in Section 4.0 concluded that a new main foodstore in one of the three new local centres proposed in planning policy would not fit with the role and function of a Local Centre in the local shopping hierarchy.

5.72 A large foodstore would be more appropriately located within a district centre but, as there are none in North West Cambridge, its siting at one of the planned Local Centres should be treated as an exception to meet the need for a store in North West Cambridge. This applies equally to all potential Local Centre locations.

5.73 A significantly larger scale of residential development is now proposed in this part of Cambridge than was envisaged when the Cambridge Local Plan and South Cambridgeshire LDF were in preparation. Additional development is now proposed at the University site as the Inspector approved a larger site footprint, and additional development was recommended by Inspectors at the NIAB Extra site and at Orchard Park following the housing shortfall work carried out by South Cambridgeshire District Council as part of the Site Specific Policies DPD. As such, this study has not been constrained by the current planning policy context for retail development when testing retail strategy. Our recommendations both in terms of new retail provision and the implications of that provision for the retail hierarchy are therefore made in that context for consideration by the Councils.

Impact on Public and Private Sector Investment

5.74 There is a considerable level of planned retail investment in Cambridge and South Cambridgeshire, including the proposed new centres to be located at Cambridge East, the Station Area, the Southern Fringe and at Northstowe. As these retail developments have been allowed for as commitments or in the development pipeline, there is considered to be sufficient expenditure capacity to support the floorspace now proposed in addition to the planned retail investment elsewhere in the City and in the surrounding major developments.

5.75 The three potential centre locations are situated at a fairly equal distance to the proposed new Town Centre at Northstowe and the proposed District Centre at Cambridge East.

5.76 Locating a new main foodstore on any one of the three North West Cambridge sites is therefore not expected to have an impact on the planned retail investment at the other major development sites within Cambridge and South Cambridgeshire, save for its impact on the other two planned Local Centres (see below). Nor would it be expected to affect the demand for unplanned out-of-centre developments (e.g. current proposal to extend Sainsbury's at Coldhams Lane) in view of their distance, even where there may be some catchment overlap.

Impact on Delivery of Viable Local Centres

5.77 We have reviewed whether the delivery of a main foodstore and the creation of a larger local centre, in any of the three locations, would impact on the delivery of viable Local Centres in the other two locations.

5.78 There is more than sufficient convenience expenditure capacity to support the delivery of small supermarkets in the two Local Centres in addition to a large foodstore if these are occupied by a small supermarket operator or discounter (which is most likely), but not if occupied as a small format by a main foodstore operator (at high sales density). There is the greatest residual capacity if the large foodstore is sited at the University site and the least if sited at Orchard Park which has a smaller commitment, but we place no weight on the difference due to less certainty about the pipeline floorspace. There are no locational factors which would influence this, and thus from a need perspective, providing a main foodstore anchoring a Local Centre on any one site would not preclude the delivery of Local Centres on the other two sites at 2021.

5.79 We have taken account of the current retail hierarchy within the City, and the distribution of centres which would be created on the three development sites. A fairly dense network of healthy District and Local Centres currently exists elsewhere in the City (for example in North East Cambridge) and the proposed centres within the three development sites would be located further apart from one another than many of the existing District Centres and Local Centres within the City.

5.80 Thus, from a distribution perspective, whilst the provision of a larger Local Centre on the NW AAP (University) or NIAB Sites would create a better distribution of centres across the City (as discussed above), we do not consider that providing a larger Local Centre on any one of the three sites would prevent delivery of a Local Centre on the other two sites, given the 2021 retail capacity, distance between centres and anticipated population distribution.

5.81 The remaining factor to consider in terms of the delivery of centres is commercial viability. In our experience, a smaller foodstore in one of the Local Centres is unlikely to be materially affected by the provision of a main foodstore in a larger Local Centre at 2021. However, early provision of a main foodstore is highly likely to influence the timing of small supermarkets in the other two centres, if there is insufficient retail capacity to support all developments.

5.82 Therefore, we do not consider that there are any locational factors which would mean that the provision of a large foodstore on any one of the sites would be more or less likely to allow the delivery of viable Local Centres on the remaining two sites.

Summary Comparison

5.83 We have compared the relative merits of a new main foodstore in the three new centre locations in very broad terms, to assess the appropriateness of each centre. This review has taken account of centre and foodstore distribution, accessibility and impact considerations.

5.84 The greatest qualitative need for a new main foodstore exists in North West Cambridge, as this area is least well served at present. In this respect, a main foodstore would provide a better distribution of store if located at the NW AAP (University) than the NIAB Sites or Orchard Park, given its greater distance to the Tesco store at Milton. NW AAP (University) and NIAB sites are also more poorly served by existing centres.

5.85 All sites provide good access elsewhere in Cambridge and out of the City by private transport. The NW AAP (University) Site appears to be the most accessible by public transport, and there are measures to improve walking and cycling within the site. Orchard Park is the least well served by public transport at present, but will be significantly improved by the Guided Busway running along the site’s boundary.

5.86 The NIAB Site would serve the greatest existing and new population within an easy walking and cycling distance. Orchard Park would serve the greatest existing and new population within easy driving distance.

5.87 The residual capacity for small supermarkets at the other two local centres is greatest if the main foodstore is sited at the University site (due to absorbing the layout pipeline/committed floorspace) and the least if sited on the Orchard Park site. However, Orchard Park is a commitment and the position may change if the pipeline developments are not approved on the basis of the scale envisaged by the LPAs.

5.88 Our review of the likely trading impact of a new main foodstore indicates that the differences between the three locations are minimal. A main foodstore in all three locations would predominantly draw trade from existing large foodstores, particularly the Tesco stores at Bar Hill and Milton. There will be some impact on Histon Road Local Centre, but the level of impact is generally low, the existing stores are mostly overtrading, and Histon Road is a healthy centre. The NW AAP (University) Site is expected to have a low trade diversion impact on Cambourne, but the centre is performing well and is still expanding. The NIAB Site and Orchard Park are expected to have a low trade diversion impact on Histon and Impington, but this trade will be derived from Tesco Express which is performing above the company average benchmark level.

5.89 There is also very little difference between the three locations in terms of several other impact considerations. We do not consider that a new foodstore at a larger Local Centre at any of the three sites would harm the planned retail investment at the major developments sites of Northstowe or Cambridge East. Furthermore, we do not consider that the provision of a main foodstore at one of the North West Cambridge sites would impact on the viable delivery of small supermarkets and local shops in the Local Centres at the other two sites at 2021, but early provision of a large foodstore is likely to influence the timing of small supermarkets in the other two centres.

5.90 However, a larger Local Centre to the west of the City – at either the NW AAP (University) or NIAB Sites – would provide a better spatial distribution of new and existing District Centres than if this were provided at Orchard Park.

5.91 We have summarised the relative merits of the three sites, as follows:

Table 5-11: Summary and Ranking of the Relative Merits of three Centre Locations

	NW AAP (University) Site	**NIAB Site**	**Orchard Park**
Qualitative need – foodstore distribution	High level of qualitative need – very poorly provided for by existing main foodstores. **Rank: 1**	High level of qualitative need - poorly provided for by existing main foodstores. **Rank: 2**	Medium level of qualitative need - Main foodstore (Tesco, Milton) just within.5 minutes drivetime **Rank: 3**
Qualitative need – centre distribution	High level of qualitative need - poorly provided for by existing centres. **Rank: 1**	High level of qualitative need - poorly provided for by existing centres. **Rank: 1**	Medium level of qualitative need – better served by existing Local Centres. **Rank: 2**
Accessibility	Very good existing and proposed accessibility by private and public transport, walking and cycling. **Rank: 1**	Good existing accessibility by private and public transport. Walking and cycling links will be improved. **Rank: 2**	Good accessibility by public transport, walking and cycling. Good access to Cambridgeshire Guided Busway. **Rank: 2**
Existing population served	Serves a low proportion of existing population by walking, cycling and driving. **Rank: 3**	Serves a relatively high proportion of existing population by walking and cycling. **Rank: 2**	Serves a high proportion of existing population by walking, cycling and driving. **Rank: 1**
New population served	Would serve a higher proportion of the new population by walking, cycling and driving. **Rank: 2**	Would serve highest proportion of new population by walking, cycling and driving. **Rank: 1**	Would serve a lower proportion of new population by walking, cycling and driving. **Rank: 3**
Trading impact on foodstores	Highest impact on out-of-centre Tesco at Bar Hill (overtrading) **Rank: 1**	Highest impact on out-of-centre Tesco Stores at Milton & Bar Hill (overtrading) **Rank: 1**	Highest impact on out-of-centre Tesco at Milton (overtrading) **Rank: 1**
Impact on Centre Vitality and Viability	No significant adverse impacts **Rank: 1**	No significant adverse impacts **Rank: 1**	No significant adverse impacts **Rank: 1**
Scale & Impact on Centre Hierarchy	Large foodstore would be an exception to Local Centre role. **Rank: 1**	Large foodstore would be an exception to Local Centre role. **Rank: 1**	Large foodstore would be an exception to Local Centre role. **Rank: 1**
impact on Local Centre Delivery	No significant adverse impacts. Most residual capacity **Rank: 1**	No significant adverse impacts **Rank: 1**	No significant adverse impacts **Rank: 1**
Overall Score	**Total = 12**	**Total = 12**	**Total = 14**

5.92 We have found that all three centre locations have merit, with University and NIAB ranked similarly and Orchard Park ranked a close third. However, from a retail planning perspective, given that impact differences are less material, we would recommend that greater weight be given to qualitative need considerations including the distribution of centres and main foodstores in Cambridge and the extent of the existing and new population served by a large foodstore within easy walking and cycling distance. On this basis, either the NW AAP (University) or the NIAB Site is likely to offer a better location than Orchard Park.

5.93 There are very few differences between the NW AAP (University) and NIAB Sites. The NW AAP (University) Site has slightly better accessibility by public transport, walking and cycling, whilst the NIAB Site better serves the existing and new population, as it is more centrally located within the urban area.

5.94 However, the preferred location for a main foodstore should not be decided on this study alone. Other factors, such as traffic impact and timing of development, are material to the selection of a main foodstore at one or two of the Local Centres.

6.0 # Conclusions and Recommendations

6.1 The North West Cambridge Supplementary Retail Study (NLP, February 2010) provides a more detailed retail planning evidence base for this area of Cambridge than the Cambridge Sub-Regional Retail Study (GVA Grimley, 2008) from which it is based. Its purpose is to assist Cambridge City Council and South Cambridgeshire District Council to form a view on: whether proposals to increase the amount of housing development in North West Cambridge give rise to a need for a changing pattern of shopping provision; and the potential emerging proposals for foodstore development at one or more of the three proposed local centres at the three development sites - Orchard Park, NIAB and NW AAP (University) – in North West Cambridge.

Sub Regional Convenience Capacity Update

6.2 This Study updates the convenience retail capacity assessment provided in the Cambridge Sub-Regional Study. It takes account of revised population and expenditure growth rates, increased convenience floorspace in pipeline developments, and an allowance for turnover efficiency of existing floorspace.

6.3 Our updated figures suggest that a lower quantum of convenience floorspace will be required than that indicated in the 2008 Study for the baseline scenario. This reflects the lower per capita expenditure growth now expected, particularly in the short term to 2011, as well as the change in approach to turnover efficiency – i.e. some of the available capacity will be absorbed by existing floorspace.

6.4 For the pipeline floorspace, our update estimates a lower level of convenience floorspace capacity to 2016 than the 2008 Study, due to a combination of the lower expenditure growth rates, the allowance for turnover efficiency of existing floorspace, and in particular the higher total turnover of the pipeline developments, resulting from increased floorspace allowances in the proposed centres at Northstowe, Cambridge East and the North West Cambridge AAP (University) Site. By 2021, we have still identified a lower level of floorspace capacity than in the 2008 Study, due to the higher total population growth expected as a result of the pipeline developments.

NW Cambridge Convenience Retail Need

6.5 The primary and secondary catchment areas for NW Cambridge were determined by examining the shopping patterns in the sub-regional household survey at the more local postal sector level. The population in the primary catchment area is expected to increase by 45% from 44,000 in 2008 to 63,750 in 2021 and convenience expenditure available by 53% from £68.6m to £105.1m.

6.6 Our baseline quantitative need assessment for the NW Cambridge catchment area finds that there is capacity for an additional 234 sqm net convenience floorspace for a main foodstore operator at 2011, over and above the committed floorspace at Orchard Park, but a deficit (i.e. an over supply) once pipeline convenience developments are taken into account. However, there can be no planning certainty on the size of the University or NIAB pipeline floorspace until such time as these have planning permission.

6.7 We identify there to be a qualitative need for a main foodstore within NW Cambridge, as this part of the City is poorly served by main foodstores. This results in high levels of spending on food shopping by people living in the NW Cambridge area taking place outside the area, particularly to the Tesco stores at Milton and Bar Hill, and unsustainable travel patterns.

6.8 We identify and assess 3 scenarios for how much convenience retail capacity there might be in NW Cambridge, once an allowance has been made for the pipeline developments at the NIAB and University sites and the main foodstore provision that we recommend as necessary. We consider that it is unrealistic and unsustainable to plan for the existing low levels of convenience expenditure (16%) by residents living in the primary catchment area at shops within this catchment and from the people living in the secondary catchment (5%) continuing.

6.9 It is more sustainable to plan to increase the convenience market shares in NW Cambridge by allowing for the introduction of a new main foodstore to meet the qualitative need, informed by the equivalent market shares achieved by the existing large stores in Cambridge within their local catchment areas – i.e. market share increase to 32% from the primary catchment area and 13% from the secondary area (in Scenario 3). This would result in convenience spending capacity beyond the pipeline developments of around £39m at 2021.

6.10 There will always be a ‘trade outflow’ from NW Cambridge, given consumer preferences and both the number and location of large stores outside the area’s primary catchment which will continue to influence shopping patterns within it. We believe that the market shares adopted are appropriately cautious so that spending capacity and floorspace requirements identified can be regarded as realistic based on the existing and planned growth in population. These will though reduce the spending available to stores in other parts of the sub-region and thus the expenditure capacity available, as residents in NW Cambridge change their shopping patterns.

Nature and Scale of Retail Provision

6.11 Four alternative options to meet the quantitative and qualitative need for the additional convenience floorspace within the planned local centres in the three NW Cambridge development sites have been identified and considered.

6.12 The conclusion is that Option 1 (a main foodstore of 2,500 sq m convenience floorspace (3,570 sq m net retail)) or the output of Option 4 (large supermarkets of around 1,500 sq m convenience floorspace (2,000 sqm net retail) in two of the three local centres) are the most appropriate and would be justified at 2021. Option 1 because it would provide:

- i the 'best fit' in terms of meeting the qualitative need for a main foodstore and the quantitative need for convenience retail floorspace.
- ii a larger local centre to meet the wider shopping needs of North West Cambridge, including the qualitative need for a main foodstore, as well as meeting the local shopping needs of each development site through smaller scale supermarket provision.
- iii an appropriate size main foodstore to compete effectively with other main foodstores in the City and result in sustainability benefits (by reducing the propensity for the existing and new population of North West Cambridge to travel elsewhere in the City or beyond, in order to undertake main food shopping).

6.13 Option 4 because it would:

- i provide an alternative means to using the capacity to contribute meeting the qualitative needs, if recent trends were to lead to retailer interest in two such sized stores in this location, offering new formats providing a point of difference to the current superstores.
- ii meet much (but not all) of the main food shopping needs of each urban expansion area and the nearby parts of North West Cambridge with stores closer in size to that contemplated in local centres.
- iii as a consequence, be likely to lead to more localised shopping trips throughout North West Cambridge, albeit some less frequent trips are likely to be made to the superstores in order to access the full grocery shopping offer.
- iv lead to a more balanced provision of foodstores in the three local centres.

6.14 The scope and merit in providing main foodstore convenience floorspace at an early stage (2011) in the developments at NW Cambridge is also examined, given that the primary need for a large foodstore arises from the existing population and the potential emerging developer proposals. A main foodstore of around 1,500 net convenience floorspace (2,000 sq m net sales area), with a view to this ultimately being extended to a 2,500 sq m net convenience floorspace (3,500 sq m net sales area) should be planned for in one centre which would absorb the committed pipeline floorspace in that centre. This approach allows for sufficient residual capacity to support the provision of small supermarkets at the other two new local centres of the scale of the committed/pipeline floorspace, linked to the delivery of the residential population in each of the 3 NW Cambridge residential development sites. Alternatively, the future need might be capable of being met by a similar sized second store (2,000 sq m net retail) in another local centre if there proves to be such commercial demand.

6.15 Nonetheless, it is for the applicants to demonstrate how their proposed development can be accommodated in conjunction with the committed development at the time of making a proposal and having regard to progress made in the delivery of both residential population and convenience retail floorspace.

Potential Centre locations

6.16 The relative merits of the three local centre locations for a main foodstore have been assessed, having regard to the following retail planning criteria, namely:

- the qualitative need to distribute main foodstore provision and centres to address areas of deficiency;
- the accessibility of each site by a range of means of transport;
- the extent of the existing and new population which would be served by a main foodstore at each of the new centres, by walking, cycling and by car;
- the trading impact of a new main foodstore in the three locations, on existing and proposed centres and stores;
- the impact on town centre vitality and viability, the centre hierarchy and planned retail investment in the area; and
- the impact on the delivery of viable local centres at the other sites.

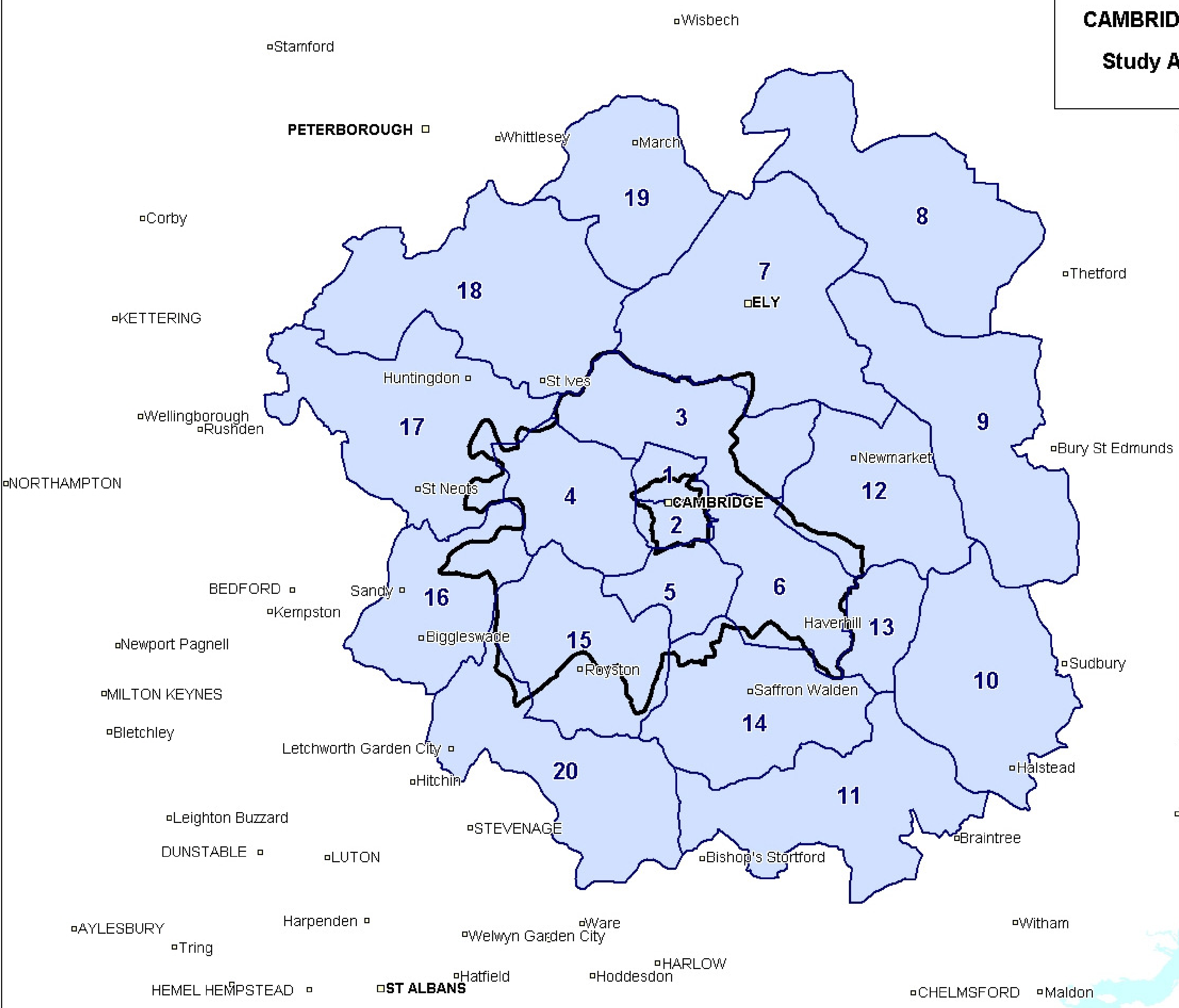
6.17 We have found that all three local centre locations have merit, with University and NIAB ranked similarly and Orchard Park ranked a close third. However, from a retail and town centre planning perspective, given that retail impact differences are less material, we would recommend that greater weight be given to the distribution of centres and main foodstores in Cambridge. This includes the extent of the existing and new population served by a large foodstore within easy walking and cycling distance and on this basis, either the NW AAP (University) or the NIAB Site is likely to offer a better location for a larger local centre than Orchard Park.

6.18 There are very few differences in the advantages and disadvantages of the NW AAP (University) and NIAB Sites. The NW AAP (University) Site has slightly better accessibility by public transport, walking and cycling, whilst the NIAB Site better serves the existing and new population, as it is more centrally located within the urban area.

6.19 However, we believe the differences between the three sites should not be decided on this study alone, given the broad nature of this relative retail planning assessment and the slight differences between the ranking of each site location. Other factors, such as traffic impact and the timing of each development, are material to the selection of a main foodstore at one or two of the Local Centres.

CAMBRIDGE SUB-REGION RETAIL STUDY

Study Area & Household Survey Zones



KEY

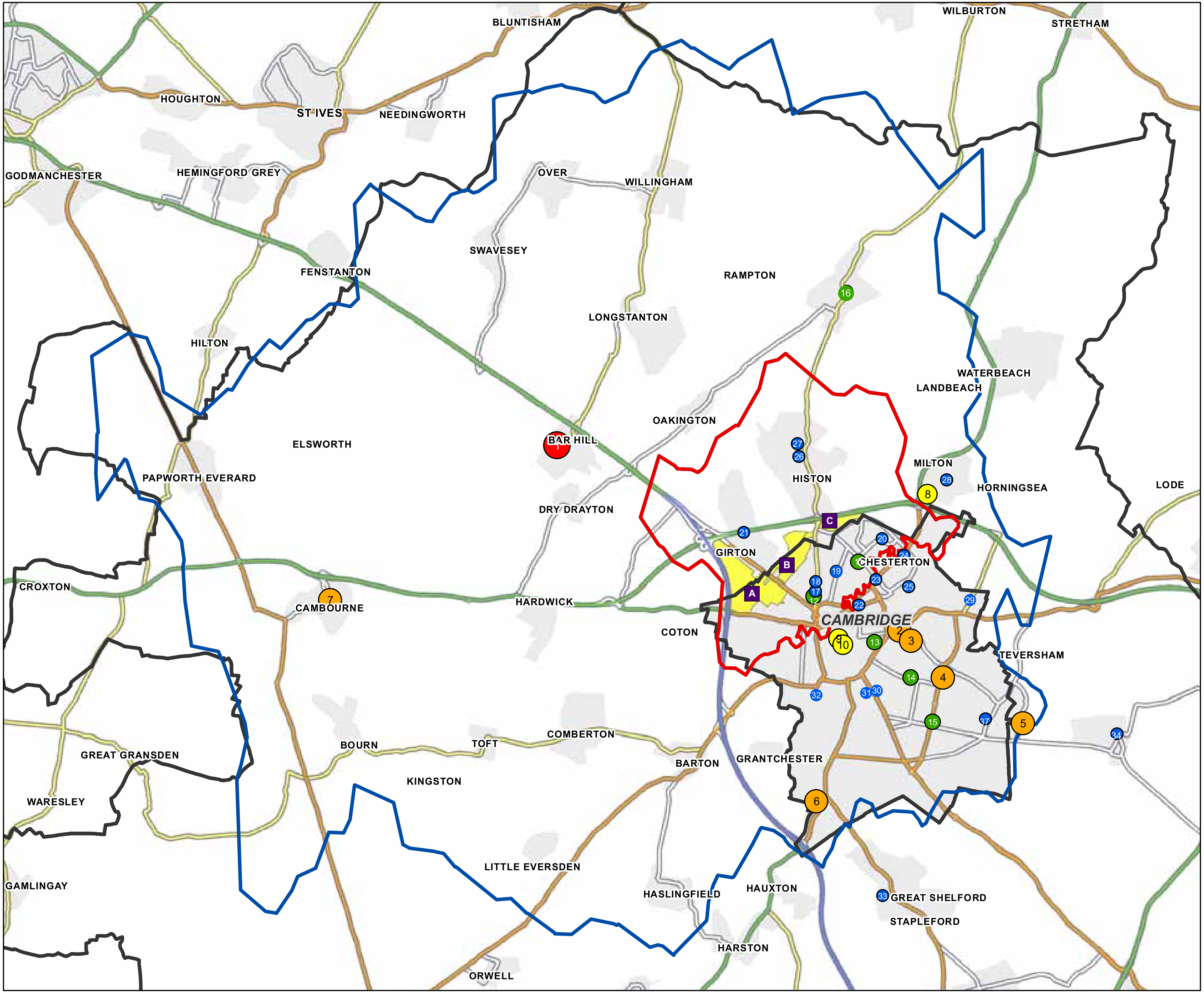
Cambridge & S.Cambs Boundaries

Study Area

Household Survey Zone

Zone	Postal Sectors
1	CB3 0, CB4 0/1/2/3/6/9, CB5 8
2	CB1 1/2/3/7/8/9, CB2 1/2/3, CB3 9
3	CB4 5/8, CB5 0/9
4	CB3 6/7/8
5	CB2 4/5/6
6	CB1 5/6
7	CB6 1/2/3, CB7 4/5
8	IP26 4,IP27 0/9, PE38 0/9
9	IP28 6/7/8, IP29 4/5
10	CO10 7/8, CO9 1/2/3/4
11	CM22 6, CM23 1, CM24 1/8, CM6 2/3, CM7 4/5
12	CB8 0/7/8/9
13	CB9 0/7/8/9
14	CB10 1/2, CB11 3/4
15	SG8 0/5/6/7/8/9
16	SG18 0/8/9, SG19 1/2/3
17	PE19 1/2/5/6/7/8, PE28 0/4/9, PE29 1/2/3/6/7
18	PE26 1/2, PE27 3/4/5/6, PE28 2/3/5
19	PE15 0/8/9, PE16 6
20	SG11 2, SG5 4, SG6 1/2/3/4, SG7 5/6, SG9 0/9, SG11 1

GVA Grimley International Property Advisers



Primary Catchment Area

Secondary Catchment Area

North West Cambridge Development Sites

Indicative Location of Proposed New Centres

A: North West AAP (University) Site
B: NIAB Site
C: Orchard Park

Foodstores

> 5,000 sqm net

1: Tesco Extra, Bar Hill

2,500 - 5,000 sqm net

2: Tesco, Cheddars Lane
3: Asda, Beehive Centre
4: J Sainsbury, Coldhams Lane
5: Tesco, Yarrow Road
6. Waitrose, Trumpington
7: Morrisons, Cambourne

1,000 - 2,500 sqm net

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9: J Sainsbury, 44 Sidney Street
10: Marks & Spencer, 6-11 Sidney Street

500 - 1,000 sqm net

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12: Aldi, Histon Road
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30: One Stop, Hills Road
31: Co-op, Hills Road
32: Co-op, Grantchester Street
33: Co-op, Great Shelford
34: Co-op, Fulbourne
35: Spar, Sawston
36: Budgens, Sawston
37: Tesco Express, Cherry Hinton

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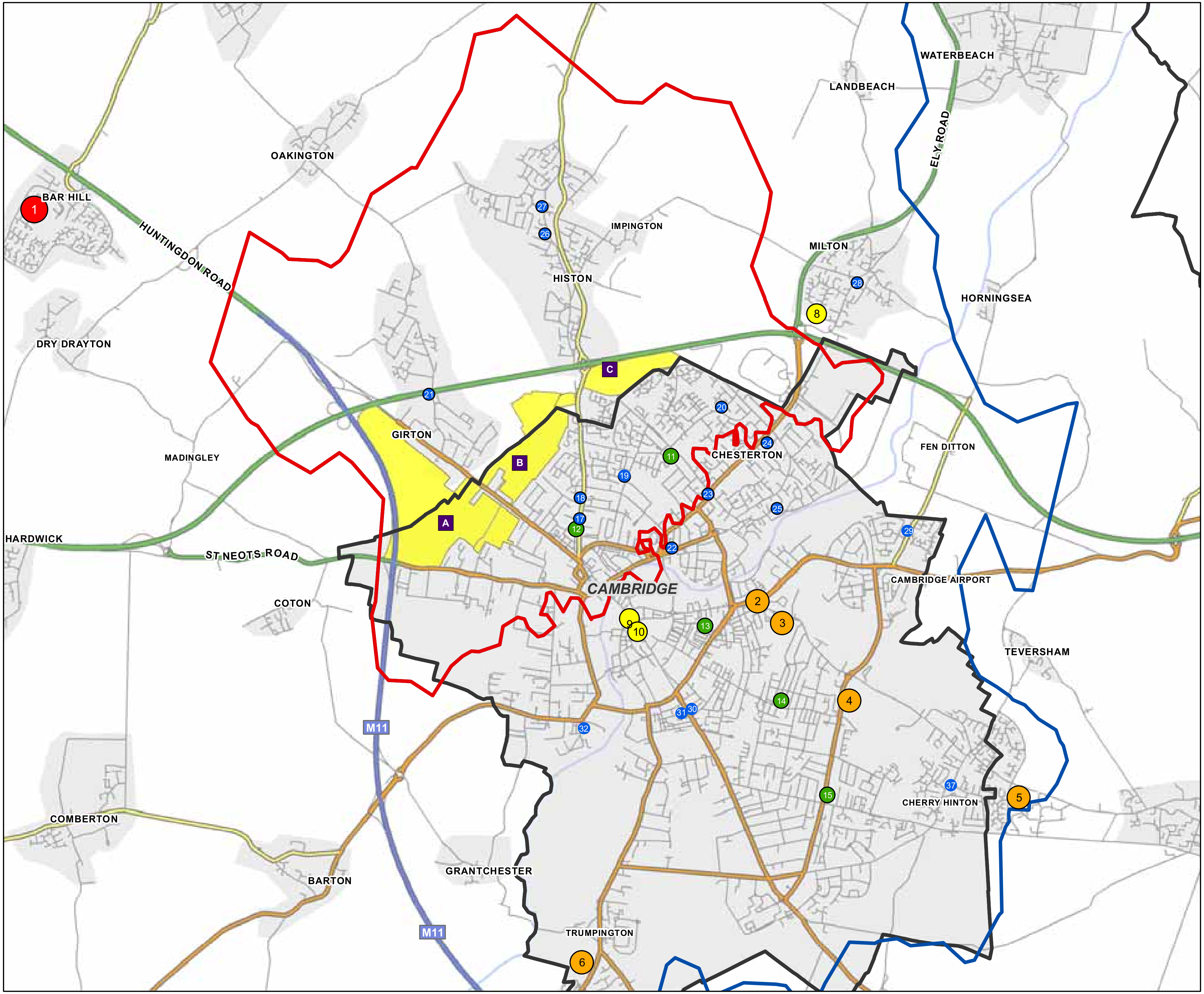
NW Cambridge Retail Study

Map 2
Catchment Area and Foodstores

Cambridge CC and South Cambs DC
23 July 2009
NTS
SA
CL 12005 / MMG3 / 002



Primary Catchment Area

Secondary Catchment Area

North West Cambridge Development Sites

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36: Budgens, Sawston
37: Tesco Express, Cherry Hinton

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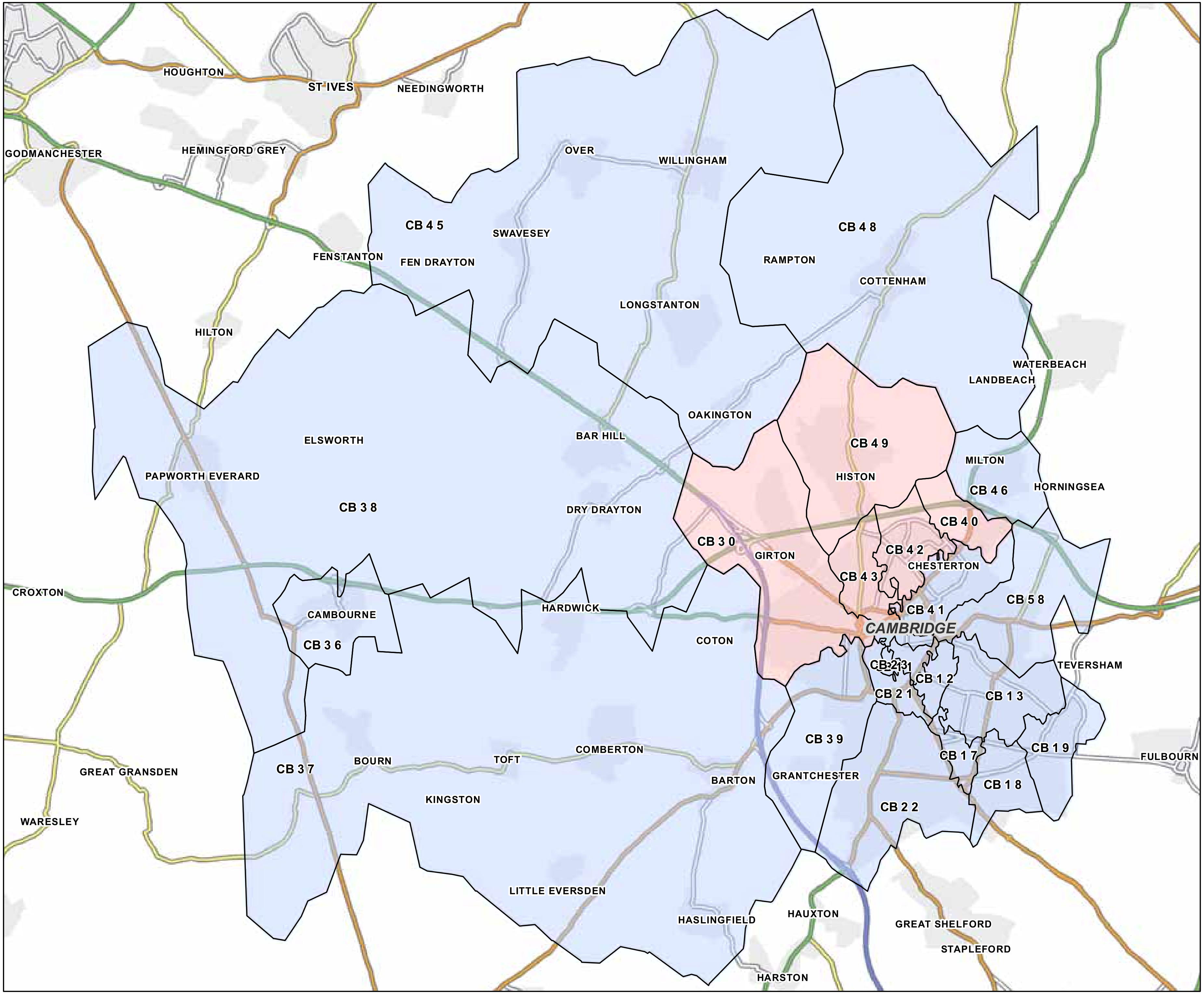
NW Cambridge Retail Study
Map 3
Catchment Area and Foodstores: Extract
Cambridge CC and South Cambs DC
23 July 2009
NTS
SA
CL 12005 / MMG3 / 003



Primary Catchment Area

Secondary Catchment Area

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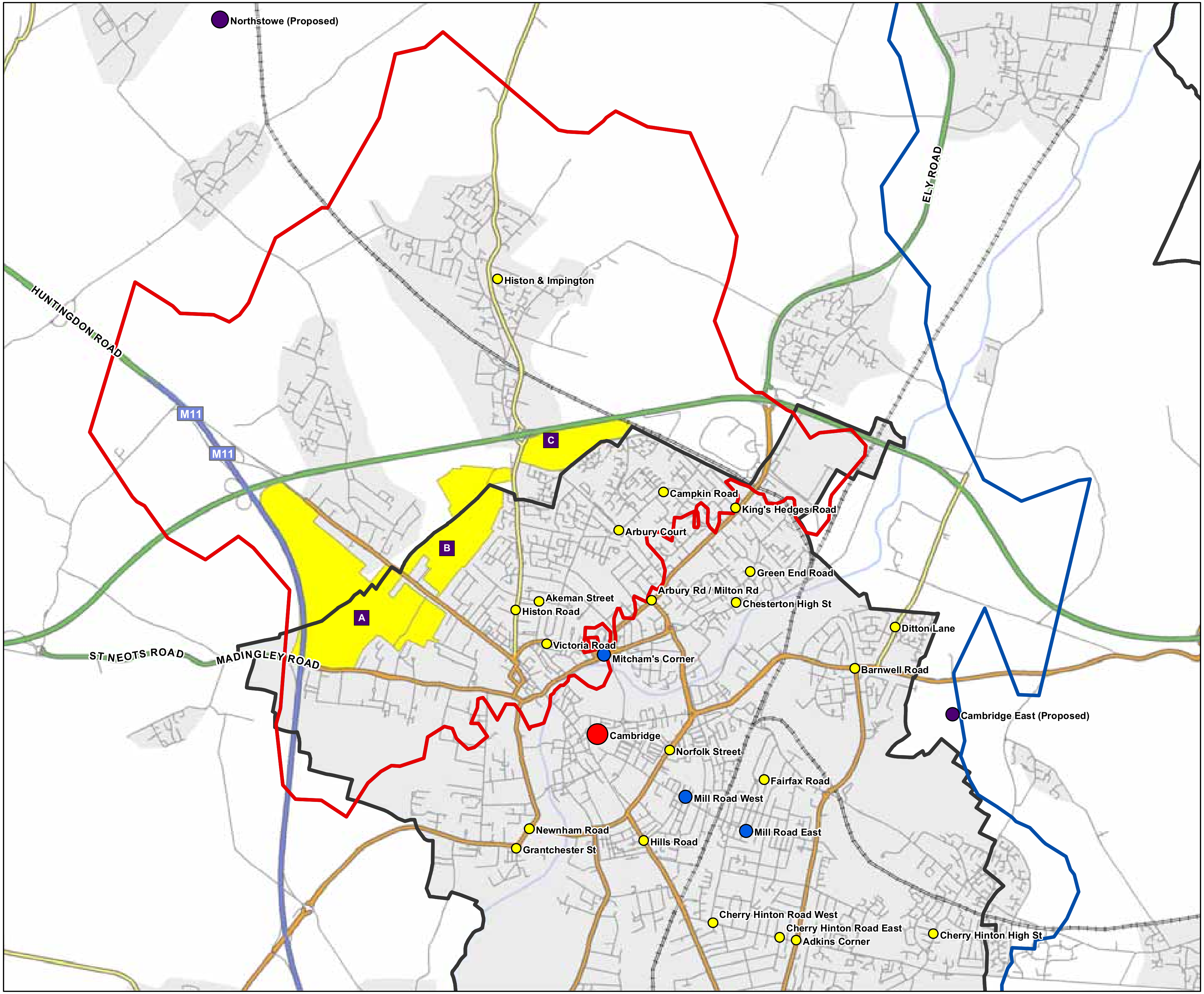
NW Cambridge Retail Study

Map 4:
Postal Sectors in Catchment Area

Cambridge CC and South Cambs DC
21 July 2009
NTS
SA
CL 12005 / MMG3 / 004



Primary Catchment Area

Secondary Catchment Area

Development Sites

Indicative Location of Proposed New Centres

A: North West AAP (University) Site
B: NIAB Site
C: Orchard Park

Retail Hierarchy

City Centre

District Centre

Local Centre

Town Centre (Proposed)

District Centre (Proposed)

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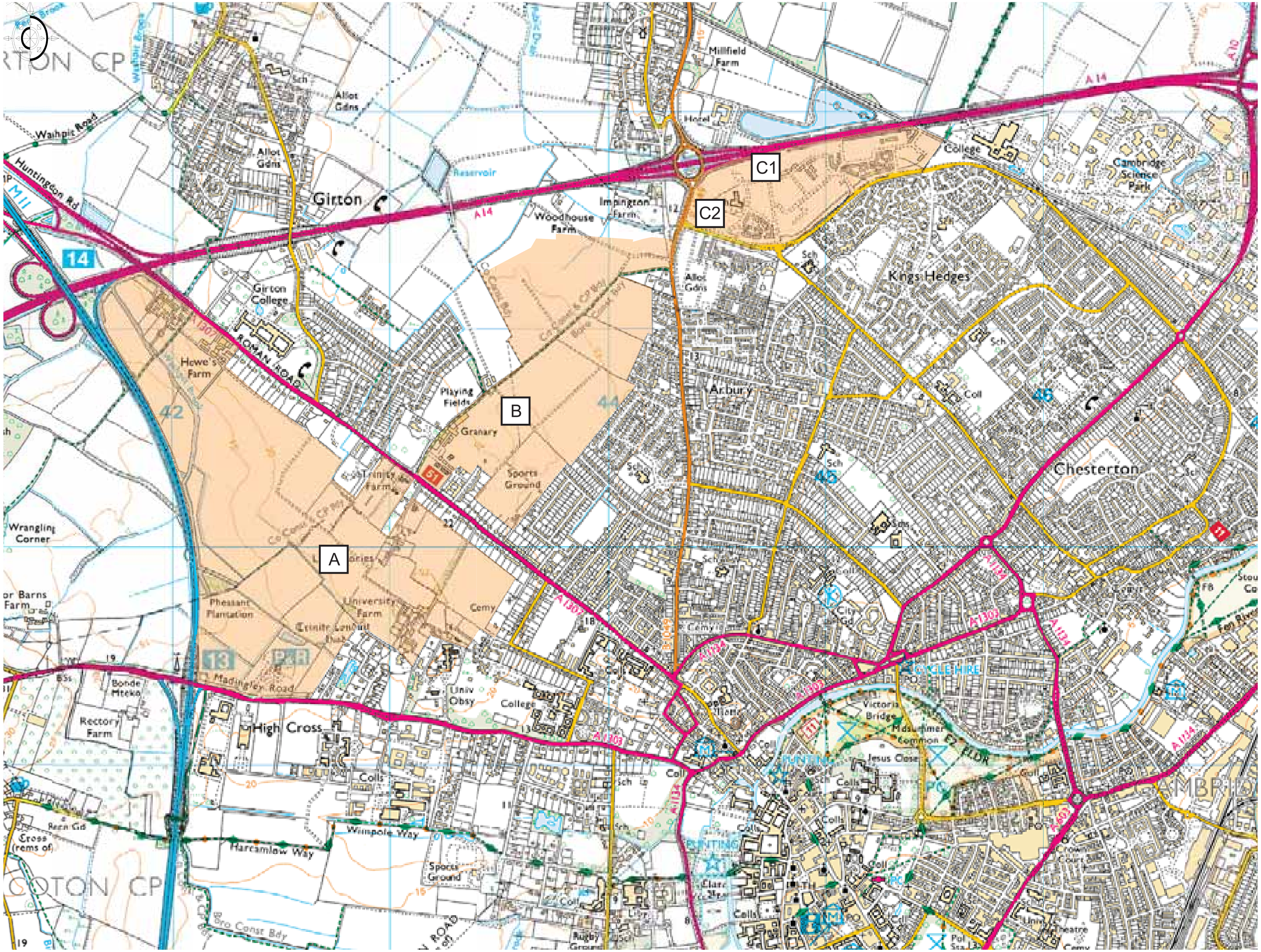
NW Cambridge Retail Study

Map 5
Retail Hierarchy

Cambridge CC and South Cambs DC
08 October 2009
NTS
SA
CL 12005 / MMG3 / 005



KEY

Development Sites

Indicative Location of Proposed Local Centres:

A

A. North West AAP (University) Site

B. NIAB Site

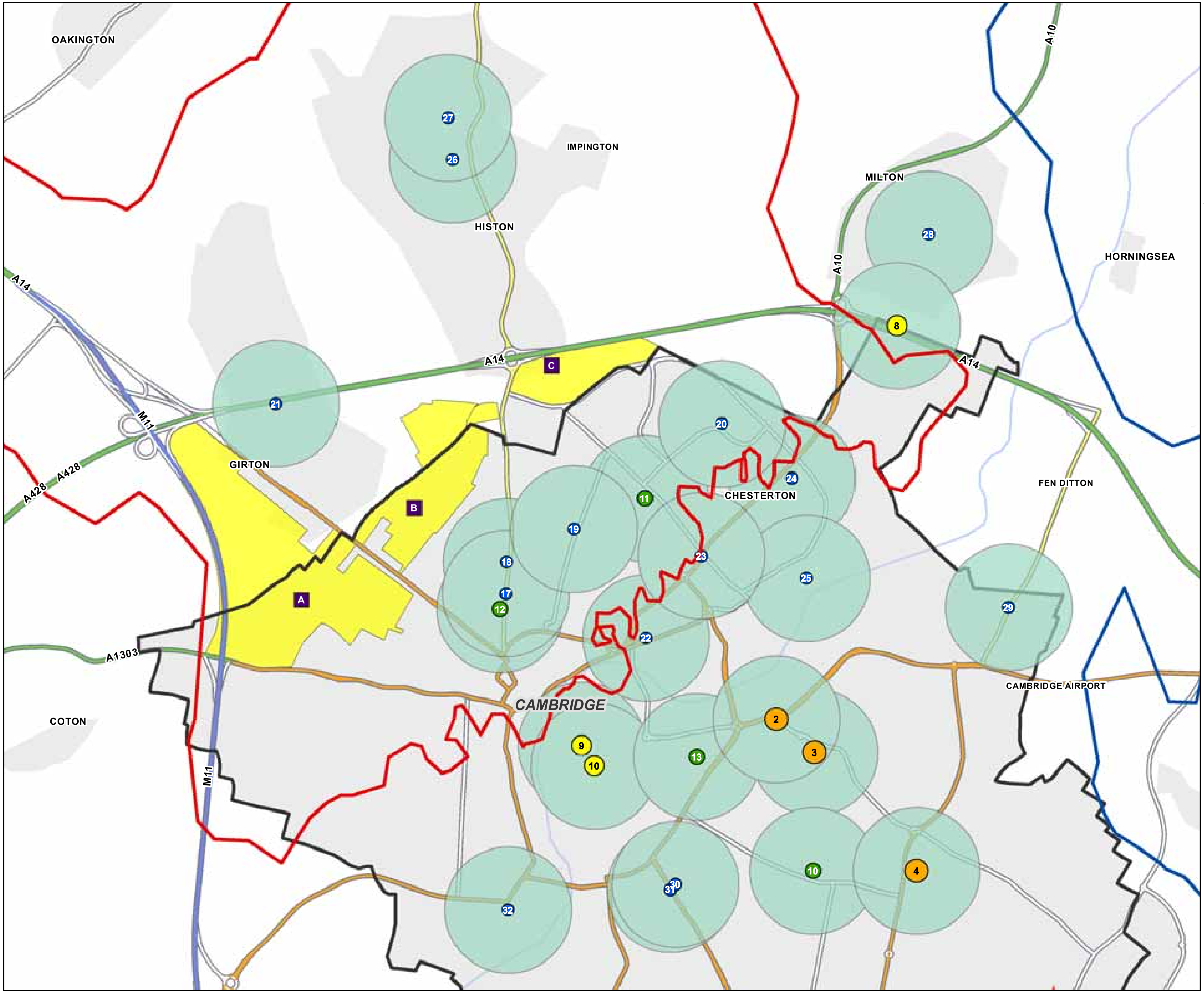
C. Orchard Park

nlp Nathaniel Lichfield and Partners

Project	NW Cambridge Retail Study
Title	**Map 6 Location of Development Sites in Relation to Urban Area**
Client	Cambridge CC and South Cambs DC
Date	June 2010
Scale	1:25000 @ A4
Drawn by	FP
Drg. No	CL12005/001

N

IL12005-001



Primary Catchment Area

Secondary Catchment Area

Development Sites

Indicative Location of Proposed Local Centres

A: North West AAP (University) Site
B: NIAB Site
C: Orchard Park

Foodstores

> 5,000 sqm net

1: Tesco Extra, Bar Hill

2,500 - 5,000 sqm net

2: Tesco, Cheddars Lane
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4: J Sainsbury, Coldhams Lane
5: Tesco, Yarrow Road
6. Waitrose, Trumpington
7: Morrisons, Cambourne

1,000 - 2,500 sqm net

8: Tesco, Milton
9: J Sainsbury, 44 Sidney Street
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500 - 1,000 sqm net

11: Budgens, Arbury Road
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32: Co-op, Grantchester Street
33: Co-op, Great Shelford
34: Co-op, Fulbourne
35: Spar, Sawston
36: Budgens, Sawston
37: Tesco Express, Cherry Hinton

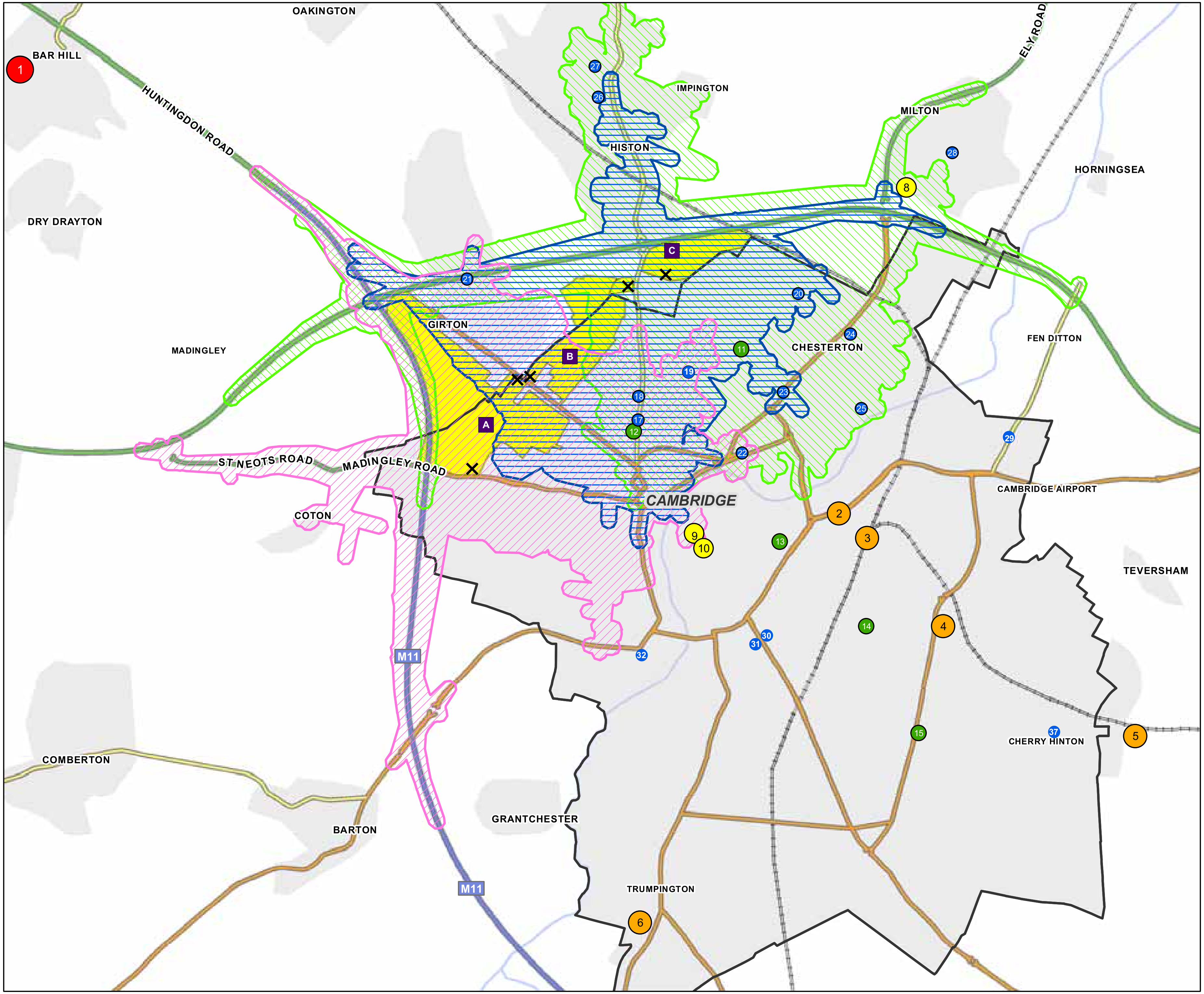
500m Radius around Existing Foodstores

Nathaniel Lichfield and Partners

NW Cambridge Retail Study

Map 7
Walking Radii around Foodstores

Cambridge CC and South Cambs DC
08 September 2009
NTS
SA
CL 12005 / MMG3 / 007



Development Sites

Indicative Location of Proposed Local Centres

A: North West AAP site
B: NIAB site
C: Orchard Park

5 Minute Drivetime Isochrones

NW AAP (University) Site

NIAB Site

Orchard Park

Drivetime Start Points

Foodstores

> 5,000 sqm net
1: Tesco Extra, Bar Hill

2,500 - 5,000 sqm net
2: Tesco, Cheddars Lane
3: Asda, Beehive Centre
4: J Sainsbury, Coldhams Lane
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6. Waitrose, Trumpington
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34: Co-op, Fulbourne
35: Spar, Sawston
36: Budgens, Sawston
37: Tesco Express, Cherry Hinton

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NW Cambridge Retail Study

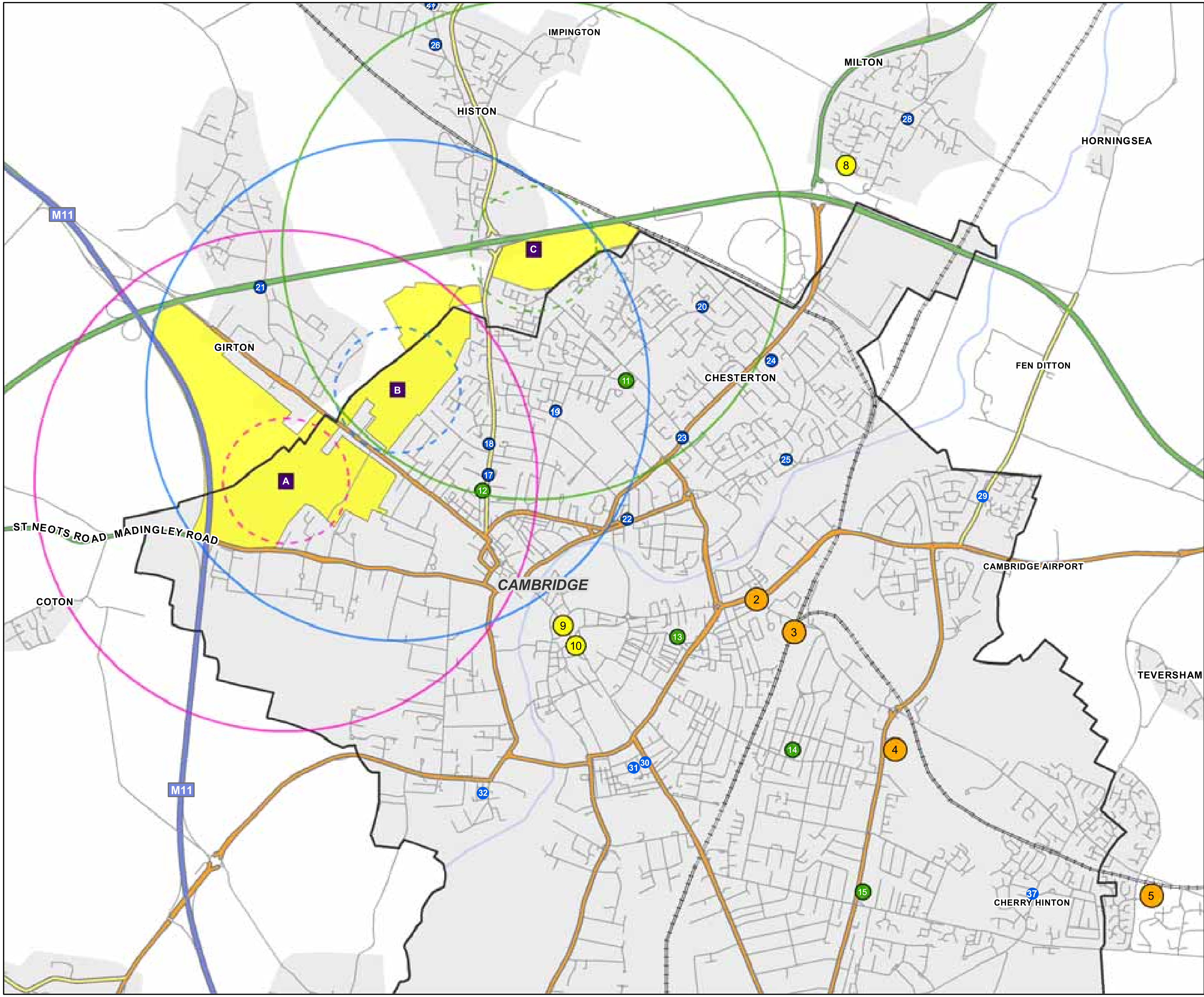
Map 8
Drivetime Isochrones from Proposed Centres

Cambridge CC and South Cambs DC

29 September 2009

SA

CL 12005 / MMG3 / 008



Walking and Cycling Distance Rings

500m Walk 2km Cycle

NW AAP (University) Site

NIAB Site

Orchard Park

Development Sites

Indicative Location of Proposed Local Centres

A: North West AAP site
B: NIAB site
C: Orchard Park

> 5,000 sqm net

1: Tesco Extra, Bar Hill

2,500 - 5,000 sqm net

2: Tesco, Cheddars Lane
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34: Co-op, Fulbourne
35: Spar, Sawston
36: Budgens, Sawston
37: Tesco Express, Cherry Hinton

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NW Cambridge Retail Study

Map 9
Walking and Cycling Radii from Proposed Centres

Cambridge CC and South Cambs DC

29 September 2009

NTS

SA

CL 12005 / MMG3 / 009

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Project	NW Cambridge Retail Study
Title	**Map 10 Cycle Routes**
Client	Cambridge CC and South Cambs DC
Date	November 2009
Scale	NTS @ A4
Drawn by	FP
Drg. No	CL12005/003

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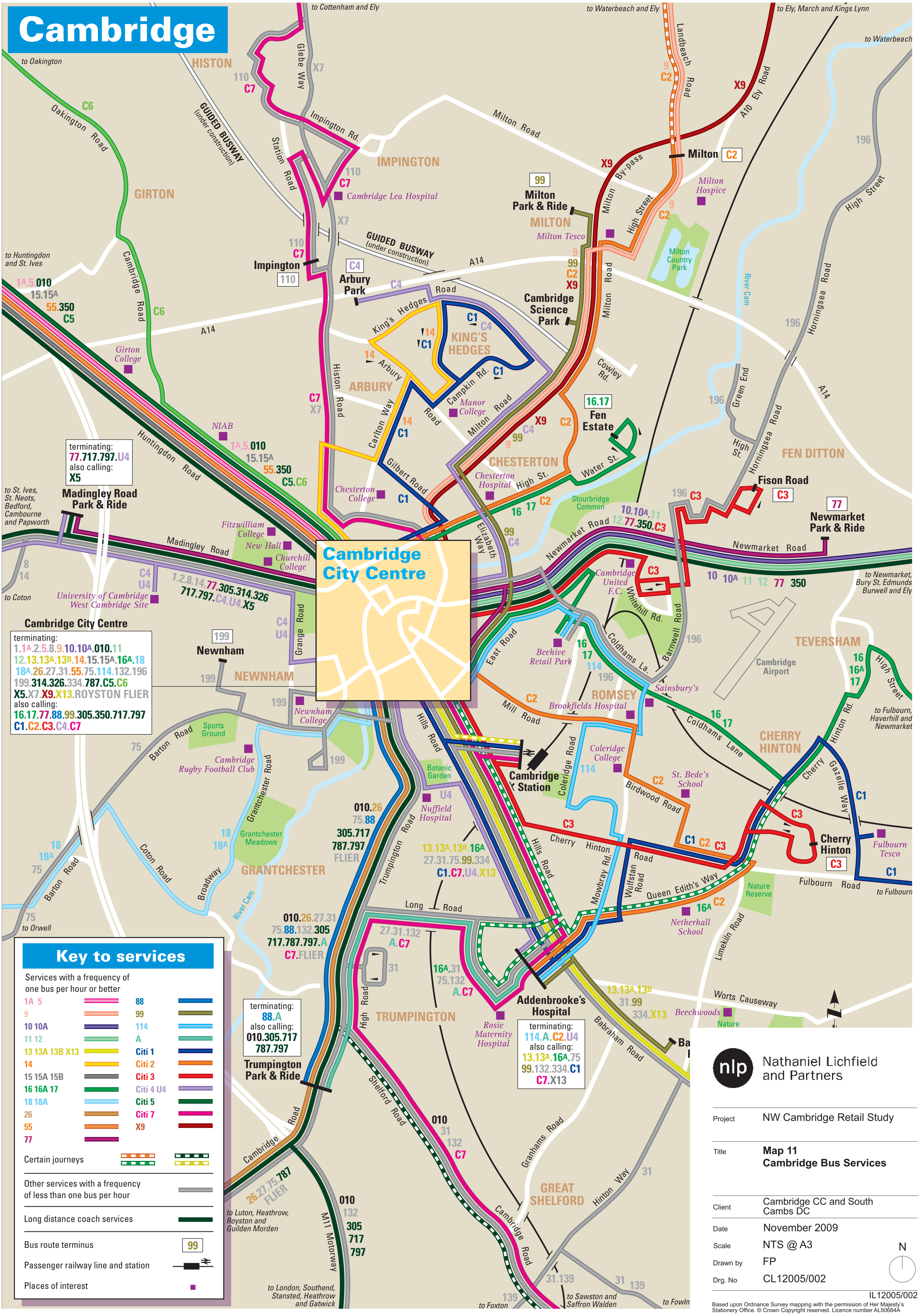
IL12005-003



nlp Nathaniel Lichfield and Partners

Project	NW Cambridge Retail Study
Title	**Map 11 Cambridge Bus Services**
Client	Cambridge CC and South Cambs DC
Date	November 2009
Scale	NTS @ A3
Drawn by	FP
Drg. No	CL12005/002

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IL12005/002

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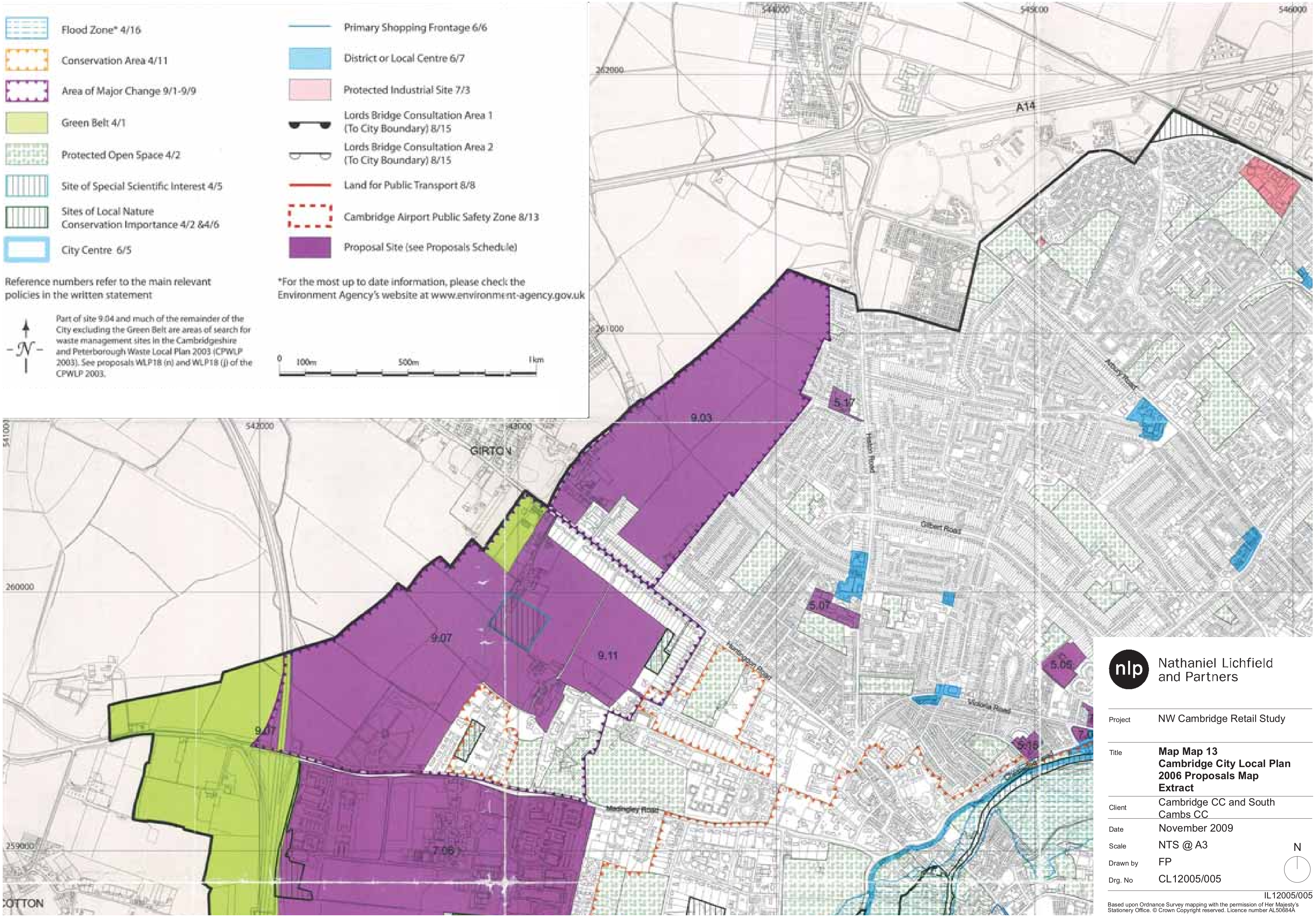
Project	NW Cambridge Retail Study
Title	**Map 12** **Cambridge Guided Busway**
Client	Cambridge CC and South Cambs DC
Date	November 2009
Scale	NTS @ A4
Drawn by	FP
Drg. No	CL12005/003

IL12005-003



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Project	NW Cambridge Retail Study
Title	**Map Map 13 Cambridge City Local Plan 2006 Proposals Map Extract**
Client	Cambridge CC and South Cambs CC
Date	November 2009
Scale	NTS @ A3
Drawn by	FP
Drg. No	CL12005/005

IL12005/005

Appendix 2a – Cambridge Sub Region Convenience Capacity Projections –GVA Grimley Update August 2009

Cambridge City Council and South Cambridgeshire District Council
Cambridge Sub Region Retail Study 2008 (GVA Grimley Updated August 2009)

TABLE 1
SURVEY AREA POPULATION FORECASTS

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

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

TABLE 1A
POPULATION GROWTH RATES

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

TABLE 2

CONVENIENCE GOODS EXPENDITURE FORECASTS PER CAPITA (2006 prices)

GROWTH IN CONVENIENCE GOODS PER CAPITA RETAIL EXPENDITURE: 0.70 %pa 2006-2021

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

Source: Experian Business Strategies March 2008

TABLE 3

SURVEY AREA RETAIL EXPENDITURE FORECASTS (2006 prices)

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

SOURCE: Table 1, Experian Business Strategies March 2008

CAMBRIDGE CITY COUNCIL: CAMBRIDGE CITY CENTRE

TABLE 4
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

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

SOURCE: Household Survey, March 2008

TABLE 5
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2005 PRICES

	SAINSBURY'S, SIDNEY STREET				MARKS AND SPENCER, SIDNEY ST				MARKS AND SPENCER, GRAFTON				CAMBRIDGE LOCAL STORES				TOTAL			
Catchment Zone	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	7,302	7,961	8,775	9,350	1,981	2,159	2,380	2,536	355	387	426	454	2,513	2,739	3,020	3,218	12,150	13,246	14,602	15,559
2	4,525	5,062	5,981	6,131	2,148	2,402	2,838	2,910	1,969	2,202	2,602	2,667	4,832	5,405	6,386	6,547	13,474	15,072	17,808	18,255
3	706	789	1,039	1,186	706	789	1,039	1,186	0	0	0	0	1,110	1,240	1,632	1,864	2,522	2,819	3,710	4,237
4	0	0	0	0	674	760	770	775	0	0	0	0	836	943	956	961	1,510	1,702	1,726	1,736
5	1,171	1,189	1,234	1,259	0	0	0	0	0	0	0	0	1,009	1,024	1,062	1,085	2,180	2,213	2,296	2,344
6	545	555	550	757	0	0	0	0	97	99	98	135	0	0	0	0	642	653	648	891
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	160	169	183	199	160	169	183	199
14	0	0	0	0	0	0	0	0	0	0	0	0	313	326	349	375	313	326	349	375
15	0	0	0	0	0	0	0	0	0	0	0	0	400	418	448	484	400	418	448	484
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
18	826	837	833	849	0	0	0	0	0	0	0	0	300	304	303	309	1,126	1,141	1,136	1,157
19	0	0	0	0	0	0	0	0	0	0	0	0	185	188	201	229	185	188	201	229
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**15,076**	**16,392**	**18,411**	**19,533**	**5,508**	**6,111**	**7,028**	**7,407**	**2,420**	**2,688**	**3,126**	**3,256**	**11,658**	**12,756**	**14,540**	**15,270**	**34,662**	**37,947**	**43,106**	**45,467**

SOURCE: Tables 3 & 4

CAMBRIDGE CITY: DISTRICT AND LOCAL CENTRE STORES

TABLE 6
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	TESCO EXPRESS, CHERRY HINTON				TESCO EXPRESS, CAMPKIN ROAD				ALDI, HISTON ROAD				ICELAND, HISTON ROAD				CO-OP, HILLS ROAD			
	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	3	3	3	3	3	3	3	3	0	0	0	0	1	1	1	1
2	1	1	1	1	1	1	1	1	1	1	1	1	0	0	0	0	5	5	5	5
3	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1	1	1	1	1
4	0	0	0	0	1	1	1	1	2	2	2	2	0	0	0	0	1	1	1	1
5	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0
6	2	2	2	2	1	1	1	1	0	0	0	0	0	0	0	0	1	1	1	1
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0

Catchment Zone	CO-OP, HISTON ROAD				BUDGENS, PERNE ROAD				BUDGENS, ARBURY RD				CO-OP, MILTON RD				CO-OP, MILL ROAD				TOTAL			
	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	2	2	2	2	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1	11	11	11	11
2	0	0	0	0	3	3	3	3	0	0	0	0	0	0	0	0	1	1	1	1	12	12	12	12
3	1	1	1	1	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	5	5	5	5
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	4	4	4
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	2	2	2	2
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	4	4	4
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	2	2	2	2
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1

SOURCE: Household Survey, March 2008

TABLE 7
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2005 PRICES

Catchment Zone	TESCO EXPRESS, CHERRY HINTON				TESCO EXPRESS, CAMPKIN ROAD				ALDI, HISTON ROAD				ICELAND, HISTON ROAD				CO-OP, HILLS ROAD			
	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	207	226	249	265	3,843	4,190	4,619	4,921	2,956	3,223	3,553	3,786	355	387	426	454	887	967	1,066	1,136
2	1,416	1,584	1,872	1,919	767	858	1,014	1,039	767	858	1,014	1,039	0	0	0	0	4,960	5,548	6,555	6,720
3	101	113	148	169	706	789	1,039	1,186	202	225	297	339	504	564	742	847	404	451	594	678
4	0	0	0	0	524	591	599	602	749	844	856	861	0	0	0	0	524	591	599	602
5	153	155	161	164	130	132	137	140	358	363	377	385	0	0	0	0	0	0	0	0
6	517	526	522	718	224	228	226	311	97	99	98	135	0	0	0	0	224	228	226	311
7	0	0	0	0	292	309	323	332	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	698	729	784	849	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	427	446	480	518	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	233	242	257	274	0	0	0	0	732	760	807	863
11	106	110	118	126	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	204	215	234	254	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	160	169	183	199
14	0	0	0	0	0	0	0	0	470	489	524	562	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	200	209	224	242
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	1,187	1,255	1,304	1,380	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	1,126	1,141	1,136	1,157	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	185	188	201	229	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	927	955	1,005	1,070	0	0	0	0	0	0	0	0
TOTALS	**2,704**	**2,930**	**3,304**	**3,617**	**6,486**	**7,097**	**7,956**	**8,533**	**10,381**	**11,056**	**11,884**	**12,584**	**859**	**950**	**1,168**	**1,302**	**8,091**	**8,922**	**10,254**	**10,751**

Catchment Zone	CO-OP, HISTON ROAD				BUDGENS, PERNE ROAD				BUDGENS, ARBURY RD				CO-OP, MILTON RD				CO-OP, MILL ROAD				TOTAL			
	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	1,981	2,159	2,380	2,536	355	387	426	454	1,094	1,192	1,315	1,401	355	387	426	454	887	967	1,066	1,136	12,919	14,084	15,526	16,543
2	307	343	405	416	2,582	2,889	3,413	3,499	0	0	0	0	307	343	405	416	895	1,001	1,183	1,212	12,001	13,424	15,861	16,260
3	504	564	742	847	0	0	0	0	0	0	0	0	706	789	1,039	1,186	0	0	0	0	3,128	3,495	4,601	5,254
4	150	169	171	172	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1,946	2,195	2,225	2,238
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	358	363	377	385	999	1,014	1,052	1,074
6	97	99	98	135	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1,159	1,180	1,170	1,609
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	292	309	323	332
8	0	0	0	0	0	0	0	0	199	208	224	243	0	0	0	0	0	0	0	0	897	937	1,007	1,092
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	427	446	480	518
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	499	518	550	588	1,464	1,519	1,614	1,725
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	106	110	118	126
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	204	215	234	254
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	160	169	183	199
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	470	489	524	562
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	200	209	224	242
16	0	0	0	0	0	0	0	0	273	285	308	333	0	0	0	0	0	0	0	0	273	285	308	333
17	0	0	0	0	0	0	0	0	0	0	0	0	475	502	522	552	0	0	0	0	1,662	1,757	1,826	1,933
18	0	0	0	0	300	304	303	309	0	0	0	0	0	0	0	0	0	0	0	0	1,427	1,445	1,439	1,466
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	185	188	201	229
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	927	955	1,005	1,070
TOTALS	**3,039**	**3,334**	**3,797**	**4,106**	**3,237**	**3,580**	**4,142**	**4,262**	**1,567**	**1,686**	**1,846**	**1,976**	**1,843**	**2,021**	**2,392**	**2,609**	**2,639**	**2,849**	**3,176**	**3,321**	**40,846**	**44,425**	**49,921**	**53,060**

CAMBRIDGE CITY COUNCIL: OUT-OF-CENTRE

TABLE 8
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

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

SOURCE: Household Survey, March 2008

TABLE 9
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2005 PRICES

Catchment Zone	TESCO, CHEDDARS LANE				ASDA, BEEHIVE CENTRE				SAINSBURY'S, COLDHAMS LANE				WAITROSE, TRUMPINGTON				TOTAL			
	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	10,938	11,925	13,145	14,007	2,572	2,804	3,091	3,293	10,584	11,538	12,719	13,552	3,991	4,351	4,796	5,111	28,085	30,618	33,751	35,963
2	6,596	7,379	8,718	8,937	4,040	4,519	5,339	5,473	21,502	24,052	28,418	29,132	14,599	16,330	19,295	19,780	46,737	52,279	61,770	63,322
3	3,027	3,382	4,452	5,085	706	789	1,039	1,186	4,943	5,525	7,272	8,305	202	225	297	339	8,878	9,922	13,059	14,916
4	374	422	428	430	749	844	856	861	898	1,013	1,027	1,033	4,117	4,643	4,708	4,733	6,138	6,922	7,019	7,057
5	813	826	857	875	358	363	377	385	1,985	2,015	2,090	2,134	10,237	10,392	10,782	11,009	13,393	13,595	14,106	14,402
6	1,015	1,033	1,024	1,409	224	228	226	311	1,873	1,907	1,890	2,601	224	228	226	311	3,335	3,396	3,366	4,633
7	292	309	323	332	0	0	0	0	0	0	0	0	0	0	0	0	292	309	323	332
8	498	520	560	606	0	0	0	0	0	0	0	0	0	0	0	0	498	520	560	606
9	427	446	480	518	427	446	480	518	0	0	0	0	0	0	0	0	853	892	960	1,037
10	0	0	0	0	0	0	0	0	0	0	0	0	499	518	550	588	499	518	550	588
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	887	936	1,018	1,106	887	936	1,018	1,106	0	0	0	0	887	936	1,018	1,106	2,662	2,808	3,055	3,318
13	370	389	422	460	1,679	1,766	1,914	2,085	370	389	422	460	370	389	422	460	2,789	2,934	3,180	3,464
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	4,948	5,169	5,543	5,989	4,948	5,169	5,543	5,989
16	0	0	0	0	631	658	711	769	0	0	0	0	0	0	0	0	631	658	711	769
17	475	502	522	552	0	0	0	0	0	0	0	0	1,662	1,757	1,826	1,933	2,137	2,258	2,348	2,485
18	0	0	0	0	1,577	1,598	1,590	1,620	0	0	0	0	0	0	0	0	1,577	1,598	1,590	1,620
19	0	0	0	0	461	470	502	572	0	0	0	0	461	470	502	572	923	941	1,004	1,145
20	1,359	1,400	1,474	1,569	0	0	0	0	0	0	0	0	0	0	0	0	1,359	1,400	1,474	1,569
TOTALS	**27,073**	**29,470**	**33,423**	**35,887**	**14,310**	**15,421**	**17,142**	**18,180**	**42,155**	**46,438**	**53,839**	**57,218**	**42,198**	**45,408**	**49,965**	**51,930**	**125,736**	**136,737**	**154,369**	**163,216**

SOUTH CAMBRIDGESHIRE: MAJOR RURAL CENTRE STORES

TABLE 10
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

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

SOURCE: Household Survey, March 2008

TABLE 11
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2005 PRICES

Catchment Zone	MORRISONS, CAMBOURNE				BUDGENS, SAWSTON				SPAR, SAWSTON				TESCO EXPRESS, HISTON				CO-OP, GREAT SHELFORD				CO-OP, FULBOURN				TOTAL			
	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	887	967	1,066	1,136	0	0	0	0	0	0	0	0	1,981	2,159	2,380	2,536	0	0	0	0	0	0	0	0	2,868	3,126	3,446	3,672
2	0	0	0	0	1,074	1,201	1,419	1,455	0	0	0	0	895	1,001	1,183	1,212	0	0	0	0	0	0	0	0	1,969	2,202	2,602	2,667
3	2,068	2,311	3,042	3,475	0	0	0	0	0	0	0	0	504	564	742	847	0	0	0	0	0	0	0	0	2,573	2,875	3,784	4,322
4	9,021	10,172	10,314	10,370	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	9,021	10,172	10,314	10,370
5	130	132	137	140	2,722	2,763	2,867	2,927	0	0	0	0	358	363	377	385	1,160	1,178	1,222	1,248	0	0	0	0	4,370	4,436	4,603	4,700
6	321	327	324	446	0	0	0	0	0	0	0	0	448	456	452	622	0	0	0	0	1,843	1,876	1,860	2,560	2,611	2,659	2,636	3,627
7	796	843	881	907	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	796	843	881	907
8	199	208	224	243	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	199	208	224	243
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	529	552	591	632	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	282	295	315	337	811	847	906	969
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	160	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	160	0	0	0
14	0	0	0	0	0	543	0	468	0	0	0	0	392	407	436	468	0	0	0	0	0	0	0	0	392	951	436	936
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	1,262	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	273	285	308	333	0	0	0	0	1,535	285	308	333
17	5,343	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	5,343	0	0	0
18	2,403	1,116	0	849	826	0	0	0	601	609	606	617	0	0	0	0	0	0	0	0	0	0	0	0	3,830	1,724	606	1,466
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1,359	1,400	1,474	1,569	0	0	0	0	1,359	1,400	1,474	1,569
TOTALS	**23,119**	**16,629**	**16,579**	**18,196**	**4,622**	**4,508**	**4,286**	**4,850**	**601**	**609**	**606**	**617**	**4,577**	**4,951**	**5,570**	**6,071**	**2,793**	**2,863**	**3,004**	**3,150**	**2,125**	**2,171**	**2,175**	**2,897**	**37,837**	**31,730**	**32,220**	**35,782**

SOURCE: Tables 3 & 10

SOUTH CAMBRIDGESHIRE: OUT-OF-CENTRE

TABLE 12
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

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

SOURCE: Household Survey, March 2008

TABLE 13
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2005 PRICES

Catchment Zone	TESCO, BAR HILL				TESCO, MILTON				TESCO, YARROW ROAD				TOTAL			
	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	14,841	16,179	17,835	19,004	33,968	37,031	40,822	43,496	148	161	178	189	48,957	53,371	58,834	62,689
2	1,534	1,716	2,027	2,078	1,841	2,059	2,433	2,494	14,088	15,758	18,619	19,087	17,463	19,533	23,079	23,659
3	9,029	10,091	13,282	15,170	11,198	12,515	16,473	18,814	3,430	3,833	5,046	5,763	23,658	26,439	34,801	39,747
4	22,533	25,410	25,764	25,904	898	1,013	1,027	1,033	0	0	0	0	23,431	26,423	26,791	26,937
5	0	0	0	0	358	363	377	385	6,614	6,714	6,966	7,113	6,972	7,077	7,343	7,497
6	0	0	0	0	224	228	226	311	8,399	8,552	8,477	11,666	8,623	8,780	8,703	11,977
7	796	843	881	907	796	843	881	907	0	0	0	0	1,593	1,686	1,762	1,813
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	1,234	1,289	1,379	1,475	1,234	1,289	1,379	1,475
12	0	0	0	0	192	203	221	240	624	658	716	778	816	861	937	1,017
13	160	169	183	199	370	389	422	460	370	389	422	460	901	948	1,027	1,119
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	1,000	1,044	1,120	1,210	200	209	224	242	0	0	0	0	1,199	1,253	1,344	1,452
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	1,187	1,255	1,304	1,380	0	0	0	0	0	0	0	0	1,187	1,255	1,304	1,380
18	4,055	4,108	4,089	4,167	0	0	0	0	0	0	0	0	4,055	4,108	4,089	4,167
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**55,135**	**60,814**	**66,485**	**70,019**	**50,046**	**54,854**	**63,105**	**68,381**	**34,908**	**37,355**	**41,803**	**46,531**	**140,089**	**153,023**	**171,393**	**184,931**

SOURCE: Tables 3 & 12

TABLE 14
CAMBRIDGE CITY

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

Source: Cambridge City Council/IGD

TABLE 15
SOUTH CAMBRIDGESHIRE

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

Source:South Cambridgeshire District Council/IGD

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

TABLE 16
RETAIL CONVENIENCE COMMITMENTS

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

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

TABLE 17
RETAIL PIPELINE - CONVENIENCE GOODS

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

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 18
FUTURE SHOP GLOBAL FLOORSPACE CAPACITY FOR CAMBRIDGE CITY COUNCIL

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

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

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

TABLE 20
FUTURE SHOP GLOBAL FLOORSPACE CAPACITY FOR CAMBRIDGE SUB REGION

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

TABLE 21
FUTURE SHOP GLOBAL FLOORSPACE CAPACITY FOR CAMBRIDGE SUB REGION WITH PIPELINE

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

Appendix 2b – Cambridge Sub Region Convenience Capacity Projections –NLP Update September 2009

Cambridge City Council and South Cambridgeshire District Council
North West Cambridge Supplementary Retail Study February 2010
Based on GVA Grimley Sub-Region Retail Study 2008 (Updated August 2009) – Appendix 2a

TABLE 1
SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2008	2011	2016	2021
1	CB3 0, CB4 0/1/2/3/6/9, CB5 8	73,769	**77,076**	**89,201**	**99,071**
2	CB1 1/2/3/7/8/9, CB2 1/2/3, CB3 9	70,291	**72,383**	**84,981**	**89,589**
3	CB4 5/8, CB5 9/0	37,771	**41,624**	**53,278**	**58,766**
4	CB3 6/7/8	26,822	**29,826**	**29,408**	**28,556**
5	CB2 4/5/6	24,027	**24,051**	**24,267**	**23,928**
6	CB1 5/6	16,604	**16,670**	**16,070**	**21,357**
7	CB6 1/2/3, CB7 4/5	62,389	**65,134**	**66,176**	**65,779**
8	IP26 4, IP27 0/9, PE38 0/9	40,261	41,458	43,359	45,368
9	IP28 6/7/8, IP29 4/5	33,619	34,668	36,277	37,840
10	CO10 7/8, CO9 3/4/1/2	37,342	38,193	39,470	40,734
11	CM22 6, CM23 1, CM24 1/8, CM6 2/3, CM7 4/5	39,137	40,299	41,923	43,305
12	CB8 0/7/8/9	34,547	35,929	38,010	39,866
13	CB9 0/7/8/9	29,387	30,482	32,124	33,800
14	CO10 1/2, CB11 3/4	29,889	30,664	31,942	33,089
15	SG8 8/9/0/5/6/7	39,068	40,243	41,969	43,796
16	SG18 0/8/9, SG19 1/2/3	49,826	51,282	53,830	56,229
17	PE19 1/2/5/6/7/8, PE28 0/4/9, PE29 1/2/3/6/7	93,302	**97,221**	**98,290**	**100,452**
18	PE26 1/2, PE27 3/4/5/6, PE28 2/3/5	58,193	**58,135**	**56,274**	**55,374**
19	PE15 0/8/9, PE16 6	38,096	**38,286**	**39,741**	**43,755**
20	SG11 2, SG5 4, SG6 1/2/3/4, SG7 5/6, SG9 0/9, SG11 1	71,343	72,444	74,167	76,247
TOTAL		**905,683**	**936,069**	**990,760**	**1,036,902**

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

TABLE 1A
POPULATION GROWTH RATES

2008-2011 (%)	2011-2016 (%)	2016-2021 (%)	*2008-2021* (%)
4.5%	**15.7%**	**11.1%**	*34.3%*
3.0%	**17.4%**	**5.4%**	*27.5%*
10.2%	**28.0%**	**10.3%**	*55.6%*
11.2%	**-1.4%**	**-2.9%**	*6.5%*
0.1%	**0.9%**	**-1.4%**	*-0.4%*
0.4%	**-3.6%**	**32.9%**	*28.6%*
4.4%	**1.6%**	**-0.6%**	*5.4%*
3.0%	4.6%	4.6%	*12.7%*
3.1%	4.6%	4.3%	*12.6%*
2.3%	3.3%	3.2%	*9.1%*
3.0%	4.0%	3.3%	*10.6%*
4.0%	5.8%	4.9%	*15.4%*
3.7%	5.4%	5.2%	*15.0%*
2.6%	4.2%	3.6%	*10.7%*
3.0%	4.3%	4.4%	*12.1%*
2.9%	5.0%	4.5%	*12.9%*
4.2%	**1.1%**	**2.2%**	*7.7%*
-0.1%	**-3.2%**	**-1.6%**	*-4.8%*
0.5%	**3.8%**	**10.1%**	*14.9%*
1.5%	2.4%	2.8%	*6.9%*
3.4%	5.8%	4.7%	*14.5%*

TABLE 2

CONVENIENCE GOODS EXPENDITURE FORECASTS PER CAPITA (2006 prices)

GROWTH IN CONVENIENCE GOODS PER CAPITA RETAIL EXPENDITURE:				
ZONE	2008	2011	2016	2021
1	1,620	1,606	1,654	1,713
2	1,471	1,457	1,501	1,555
3	1,800	1,784	1,837	1,903
4	1,881	1,864	1,920	1,988
5	1,825	1,808	1,863	1,929
6	1,817	1,800	1,855	1,921
7	1,720	1,705	1,756	1,818
8	1,668	1,653	1,703	1,763
9	1,710	1,695	1,746	1,808
10	1,802	1,786	1,840	1,905
11	1,822	1,805	1,860	1,926
12	1,731	1,715	1,767	1,830
13	1,698	1,683	1,734	1,795
14	1,766	1,750	1,803	1,867
15	1,724	1,709	1,760	1,823
16	1,706	1,691	1,742	1,804
17	1,715	1,700	1,751	1,813
18	1,739	1,723	1,775	1,838
19	1,632	1,618	1,666	1,726
20	1,751	1,735	1,788	1,851

Source: Experian Business Strategies March 2008

Based on GVA 2006 per capita base expenditure

Excluding special forms of trading - 2.0% in 2009, 2.2% in 2010, 2.3% in 2011/12, 2.5% in 2013, 2.6% in 2014, 2.8% post 2

Experian Business Strategies - forecast annual growth rates for 2006 to 2011 (0.7%, 0.9%, -0.5%, -0.1% and 0.2%)

Experian Business Strategies - ultra long term growth rate adopted beyond 2011 (0.7% per annum)

TABLE 3

SURVEY AREA RETAIL EXPENDITURE FORECASTS (2006 prices)

	CONVENIENCE GOODS			
ZONE	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	119,534	123,760	147,552	169,695
2	103,378	105,489	127,588	139,281
3	67,987	74,242	97,899	111,815
4	50,447	55,588	56,464	56,773
5	43,848	43,493	45,209	46,159
6	30,169	30,014	29,807	41,020
7	107,319	111,024	116,206	119,609
8	67,167	68,536	73,842	80,006
9	57,495	58,750	63,333	68,407
10	67,290	68,198	72,606	77,591
11	71,305	72,756	77,973	83,402
12	59,806	61,633	67,172	72,952
13	49,905	51,295	55,690	60,676
14	52,786	53,663	57,587	61,772
15	67,359	68,755	73,869	79,821
16	85,013	86,703	93,759	101,413
17	160,029	165,237	172,098	182,127
18	101,205	100,186	99,908	101,799
19	62,186	61,930	66,224	75,501
20	124,928	125,705	132,580	141,136
TOTAL	**1,549,155**	**1,586,954**	**1,727,369**	**1,870,955**

SOURCE: Table 1, Table 2

CAMBRIDGE CITY COUNCIL: CAMBRIDGE CITY CENTRE

TABLE 4
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

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

SOURCE: Household Survey, March 2008

TABLE 5
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2005 PRICES

Catchment Zone	SAINSBURY'S, SIDNEY STREET				MARKS AND SPENCER, SIDNEY ST				MARKS AND SPENCER, GRAFTON				CAMBRIDGE LOCAL STORES				TOTAL			
	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	7,381	7,642	9,111	10,479	2,002	2,073	2,471	2,842	359	371	443	509	2,540	2,630	3,135	3,606	12,282	12,716	15,161	17,436
2	4,574	4,668	5,646	6,163	2,171	2,215	2,679	2,925	1,990	2,031	2,456	2,681	4,885	4,984	6,029	6,581	13,620	13,898	16,810	18,350
3	714	780	1,028	1,174	714	780	1,028	1,174	0	0	0	0	1,122	1,225	1,615	1,845	2,550	2,784	3,671	4,193
4	0	0	0	0	681	750	762	766	0	0	0	0	845	931	946	951	1,526	1,682	1,708	1,717
5	1,184	1,174	1,221	1,246	0	0	0	0	0	0	0	0	1,019	1,011	1,051	1,073	2,203	2,186	2,272	2,319
6	551	548	544	749	0	0	0	0	98	98	97	133	0	0	0	0	649	645	641	882
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	162	167	181	197	162	167	181	197
14	0	0	0	0	0	0	0	0	0	0	0	0	317	322	346	371	317	322	346	371
15	0	0	0	0	0	0	0	0	0	0	0	0	404	413	443	479	404	413	443	479
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
18	835	827	824	840	0	0	0	0	0	0	0	0	304	301	300	305	1,139	1,127	1,124	1,145
19	0	0	0	0	0	0	0	0	0	0	0	0	187	186	199	227	187	186	199	227
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**15,239**	**15,638**	**18,374**	**20,651**	**5,568**	**5,818**	**6,941**	**7,708**	**2,447**	**2,499**	**2,996**	**3,324**	**11,784**	**12,169**	**14,244**	**15,635**	**35,038**	**36,125**	**42,555**	**47,317**

SOURCE: Tables 3 & 4

CAMBRIDGE CITY: DISTRICT AND LOCAL CENTRE STORES

TABLE 6
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	TESCO EXPRESS, CHERRY HINTON				TESCO EXPRESS, CAMPKIN ROAD				ALDI, HISTON ROAD				ICELAND, HISTON ROAD				CO-OP, HILLS ROAD				CO-OP, HISTON ROAD			
	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	3	3	3	3	3	3	3	3	0	0	0	0	1	1	1	1	2	2	2	2
2	1	1	1	1	1	1	1	1	1	1	1	1	0	0	0	0	5	5	5	5	0	0	0	0
3	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1	1	1	1	1	1	1	1	1
4	0	0	0	0	1	1	1	1	2	2	2	2	0	0	0	0	1	1	1	1	0	0	0	0
5	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0
6	2	2	2	2	1	1	1	1	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: Household Survey, March 2008

TABLE 7
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2005 PRICES

Catchment Zone	TESCO EXPRESS, CHERRY HINTON				TESCO EXPRESS, CAMPKIN ROAD				ALDI, HISTON ROAD				ICELAND, HISTON ROAD				CO-OP, HILLS ROAD				CO-OP, HISTON ROAD			
	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	209	217	258	297	3,885	4,022	4,795	5,515	2,988	3,094	3,689	4,242	359	371	443	509	897	928	1,107	1,273	2,002	2,073	2,471	2,842
2	1,432	1,461	1,767	1,929	775	791	957	1,045	775	791	957	1,045	0	0	0	0	5,014	5,116	6,188	6,755	310	316	383	418
3	102	111	147	168	714	780	1,028	1,174	204	223	294	335	510	557	734	839	408	445	587	671	510	557	734	839
4	0	0	0	0	530	584	593	596	757	834	847	852	0	0	0	0	530	584	593	596	151	167	169	170
5	155	153	159	163	132	130	136	138	362	359	373	381	0	0	0	0	0	0	0	0	0	0	0	0
6	523	520	516	711	226	225	224	308	98	98	97	133	0	0	0	0	226	225	224	308	98	98	97	133
7	0	0	0	0	295	305	320	329	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	705	720	775	840	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	431	441	475	513	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	236	239	254	272	0	0	0	0	740	750	799	854	0	0	0	0
11	107	109	117	125	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	206	213	232	252	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	162	167	181	197	0	0	0	0
14	0	0	0	0	0	0	0	0	475	483	518	556	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	202	206	222	239	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	1,200	1,239	1,291	1,366	0	0	0	0	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	1,139	1,127	1,124	1,145	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	187	186	199	227	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	937	943	994	1,059	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**2,733**	**2,784**	**3,197**	**3,644**	**6,557**	**6,837**	**8,052**	**9,105**	**10,493**	**10,775**	**11,887**	**12,965**	**869**	**928**	**1,177**	**1,348**	**8,179**	**8,422**	**9,900**	**10,893**	**3,072**	**3,211**	**3,855**	**4,402**

SOURCE: Tables 3 & 6

TABLE 6 (a)
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	BUDGENS, PERNE ROAD				BUDGENS, ARBURY RD				CO-OP, MILTON RD				CO-OP, MILL ROAD				TOTAL			
	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
2	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1	11	11	11	11
1	3	3	3	3	0	0	0	0	0	0	0	0	1	1	1	1	12	12	12	12
3	0	0	0	0	0	0	0	0	1	1	1	1	0	0	0	0	5	5	5	5
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	4	4	4
5	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	2	2	2	2
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	4	4	4
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
10	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	2	2	2	2
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1

SOURCE:

TABLE 7 (b)
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2005 PRICES

Catchment Zone	BUDGENS, PERNE ROAD				BUDGENS, ARBURY RD				CO-OP, MILTON RD				CO-OP, MILL ROAD				TOTAL			
	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	359	371	443	509	1,106	1,145	1,365	1,570	359	371	443	509	897	928	1,107	1,273	13,059	13,521	16,120	18,539
2	2,610	2,664	3,222	3,517	0	0	0	0	310	316	383	418	905	923	1,116	1,219	12,131	12,379	14,972	16,345
3	0	0	0	0	0	0	0	0	714	780	1,028	1,174	0	0	0	0	3,161	3,452	4,552	5,199
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1,967	2,168	2,202	2,214
5	0	0	0	0	0	0	0	0	0	0	0	0	362	359	373	381	1,010	1,001	1,041	1,063
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1,171	1,165	1,157	1,593
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	295	305	320	329
8	0	0	0	0	201	206	222	240	0	0	0	0	0	0	0	0	907	925	997	1,080
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	431	441	475	513
10	0	0	0	0	0	0	0	0	0	0	0	0	505	511	545	582	1,480	1,500	1,597	1,707
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	107	109	117	125
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	206	213	232	252
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	162	167	181	197
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	475	483	518	556
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	202	206	222	239
16	0	0	0	0	276	282	305	330	0	0	0	0	0	0	0	0	276	282	305	330
17	0	0	0	0	0	0	0	0	480	496	516	546	0	0	0	0	1,680	1,735	1,807	1,912
18	304	301	300	305	0	0	0	0	0	0	0	0	0	0	0	0	1,442	1,428	1,424	1,451
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	187	186	199	227
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	937	943	994	1,059
TOTALS	**3,273**	**3,335**	**3,964**	**4,331**	**1,583**	**1,632**	**1,891**	**2,139**	**1,863**	**1,963**	**2,370**	**2,647**	**2,667**	**2,722**	**3,141**	**3,454**	**41,289**	**42,609**	**49,432**	**54,929**

SOURCE:

CAMBRIDGE CITY COUNCIL: OUT-OF-CENTRE

TABLE 8
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

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

SOURCE: Household Survey, March 2008

TABLE 9
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2005 PRICES

	TESCO, CHEDDARS LANE				ASDA, BEEHIVE CENTRE				SAINSBURY'S, COLDHAMS LANE				WAITROSE, TRUMPINGTON				TOTAL			
Catchment Zone	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	11,057	11,448	13,649	15,697	2,600	2,692	3,209	3,691	10,698	11,076	13,206	15,188	4,034	4,177	4,980	5,727	28,389	29,393	35,044	40,303
2	6,668	6,804	8,229	8,984	4,083	4,167	5,040	5,502	21,735	22,179	26,825	29,284	14,757	15,058	18,213	19,882	47,244	48,208	58,308	63,651
3	3,059	3,341	4,405	5,032	714	780	1,028	1,174	4,997	5,457	7,196	8,218	204	223	294	335	8,974	9,800	12,923	14,760
4	378	417	423	426	757	834	847	852	908	1,001	1,016	1,022	4,162	4,586	4,658	4,684	6,205	6,837	6,945	6,983
5	822	815	848	865	362	359	373	381	2,006	1,990	2,068	2,112	10,348	10,264	10,669	10,893	13,538	13,428	13,958	14,251
6	1,026	1,020	1,013	1,395	226	225	224	308	1,893	1,883	1,870	2,574	226	225	224	308	3,371	3,354	3,331	4,584
7	295	305	320	329	0	0	0	0	0	0	0	0	0	0	0	0	295	305	320	329
8	504	514	554	600	0	0	0	0	0	0	0	0	0	0	0	0	504	514	554	600
9	431	441	475	513	431	441	475	513	0	0	0	0	0	0	0	0	862	881	950	1,026
10	0	0	0	0	0	0	0	0	0	0	0	0	505	511	545	582	505	511	545	582
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	897	925	1,008	1,094	897	925	1,008	1,094	0	0	0	0	897	925	1,008	1,094	2,691	2,774	3,023	3,283
13	374	385	418	455	1,697	1,744	1,893	2,063	374	385	418	455	374	385	418	455	2,820	2,898	3,147	3,428
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	5,001	5,105	5,485	5,927	5,001	5,105	5,485	5,927
16	0	0	0	0	638	650	703	761	0	0	0	0	0	0	0	0	638	650	703	761
17	480	496	516	546	0	0	0	0	0	0	0	0	1,680	1,735	1,807	1,912	2,160	2,231	2,323	2,459
18	0	0	0	0	1,594	1,578	1,574	1,603	0	0	0	0	0	0	0	0	1,594	1,578	1,574	1,603
19	0	0	0	0	466	464	497	566	0	0	0	0	466	464	497	566	933	929	993	1,133
20	1,374	1,383	1,458	1,552	0	0	0	0	0	0	0	0	0	0	0	0	1,374	1,383	1,458	1,552
TOTALS	**27,366**	**28,293**	**33,316**	**37,488**	**14,465**	**14,858**	**16,870**	**18,507**	**42,612**	**43,971**	**52,600**	**58,853**	**42,656**	**43,659**	**48,796**	**52,366**	**127,099**	**130,780**	**151,582**	**167,214**

SOURCE: Tables 3 & 8

SOUTH CAMBRIDGESHIRE: MAJOR RURAL CENTRE STORES

TABLE 10
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

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

SOURCE: Household Survey, March 2008

TABLE 11
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2005 PRICES

	MORRISONS, CAMBOURNE				BUDGENS, SAWSTON				SPAR, SAWSTON				TESCO EXPRESS, HISTON				CO-OP, GREAT SHELFORD				CO-OP, FULBOURN				TOTAL			
Catchment Zone	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	897	928	1,107	1,273	0	0	0	0	0	0	0	0	2,002	2,073	2,471	2,842	0	0	0	0	0	0	0	0	2,899	3,001	3,578	4,115
2	0	0	0	0	1,085	1,108	1,340	1,462	0	0	0	0	905	923	1,116	1,219	0	0	0	0	0	0	0	0	1,990	2,031	2,456	2,681
3	2,091	2,283	3,010	3,438	0	0	0	0	0	0	0	0	510	557	734	839	0	0	0	0	0	0	0	0	2,601	2,840	3,745	4,277
4	9,118	10,047	10,206	10,262	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	9,118	10,047	10,206	10,262
5	132	130	136	138	2,751	2,729	2,837	2,896	0	0	0	0	362	359	373	381	1,173	1,163	1,209	1,235	0	0	0	0	4,418	4,382	4,555	4,650
6	324	323	320	441	0	0	0	0	0	0	0	0	453	450	447	615	0	0	0	0	1,863	1,853	1,841	2,533	2,640	2,626	2,608	3,589
7	805	833	872	897	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	805	833	872	897
8	201	206	222	240	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	201	206	222	240
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	535	546	585	626	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	285	291	312	334	820	837	897	959
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	162	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	162	0	0	0
14	0	0	0	0	0	537	0	463	0	0	0	0	396	402	432	463	0	0	0	0	0	0	0	0	396	939	432	927
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	1,275	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	276	282	305	330	0	0	0	0	1,551	282	305	330
17	5,401	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	5,401	0	0	0
18	2,429	1,102	0	840	835	0	0	0	607	601	599	611	0	0	0	0	0	0	0	0	0	0	0	0	3,871	1,703	599	1,451
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1,374	1,383	1,458	1,552	0	0	0	0	1,374	1,383	1,458	1,552
TOTALS	**23,370**	**16,398**	**16,457**	**18,155**	**4,672**	**4,373**	**4,177**	**4,822**	**607**	**601**	**599**	**611**	**4,627**	**4,764**	**5,574**	**6,359**	**2,823**	**2,828**	**2,972**	**3,117**	**2,148**	**2,144**	**2,152**	**2,867**	**38,247**	**31,109**	**31,932**	**35,930**

SOURCE: Tables 3 & 10

SOUTH CAMBRIDGESHIRE: OUT-OF-CENTRE

TABLE 12
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

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

SOURCE: Household Survey, March 2008

TABLE 13
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2005 PRICES

Catchment Zone	TESCO, BAR HILL				TESCO, MILTON				TESCO, YARROW ROAD				TOTAL			
	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	15,002	15,532	18,518	21,297	34,336	35,550	42,384	48,745	149	155	184	212	49,487	51,236	61,087	70,254
2	1,551	1,582	1,914	2,089	1,861	1,899	2,297	2,507	14,240	14,531	17,575	19,186	17,652	18,012	21,786	23,782
3	9,127	9,967	13,143	15,011	11,320	12,361	16,300	18,617	3,467	3,786	4,993	5,703	23,914	26,115	34,436	39,331
4	22,777	25,098	25,494	25,633	908	1,001	1,016	1,022	0	0	0	0	23,685	26,098	26,510	26,655
5	0	0	0	0	362	359	373	381	6,686	6,632	6,893	7,038	7,047	6,990	7,266	7,419
6	0	0	0	0	226	225	224	308	8,490	8,447	8,389	11,544	8,716	8,672	8,612	11,852
7	805	833	872	897	805	833	872	897	0	0	0	0	1,610	1,665	1,743	1,794
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	1,248	1,273	1,365	1,460	1,248	1,273	1,365	1,460
12	0	0	0	0	194	200	218	237	631	650	709	770	825	851	927	1,007
13	162	167	181	197	374	385	418	455	374	385	418	455	911	936	1,016	1,107
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	1,010	1,031	1,108	1,197	202	206	222	239	0	0	0	0	1,212	1,238	1,330	1,437
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	1,200	1,239	1,291	1,366	0	0	0	0	0	0	0	0	1,200	1,239	1,291	1,366
18	4,099	4,058	4,046	4,123	0	0	0	0	0	0	0	0	4,099	4,058	4,046	4,123
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**55,733**	**59,506**	**66,566**	**71,810**	**50,589**	**53,018**	**64,323**	**73,408**	**35,286**	**35,859**	**40,525**	**46,367**	**141,607**	**148,383**	**171,414**	**191,586**

SOURCE: Tables 3 & 12

TABLE 14
CAMBRIDGE CITY

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sqm net)	Total Potential Turnover (£000s)
CAMBRIDGE CITY CENTRE					
Sainsbury's, Sidney Street	1,326	95%	1,260	9,744	12,275
Marks & Spencer, Sidney Street	1,171	95%	1,112	11,800	13,127
Marks and Spencer, Grafton Centre	773	95%	734	11,800	8,665
Cambridge Local Stores	1,048	95%	996	2,500	2,489
SUB TOTAL			**4,102**	**8,912**	**36,556**
DISTRICT AND LOCAL CENTRE STORES					
Tesco Express, Cherry Hinton	245	100%	245	12,894	3,159
Tesco Express, Campkin Road	191	100%	191	12,894	2,463
Tesco Express, High Street, Chesterton	176	100%	176	12,895	2,270
Aldi, Histon Road	697	95%	662	3,638	2,409
Iceland, Histon Road	425	95%	404	5,715	2,307
Co-Op, Hills Road	217	95%	206	6,722	1,386
Co-Op, Histon Road	359	95%	341	6,722	2,293
One Stop, Carlton Terrace	139	100%	139	5,000	695
Co-op, Grantchester Street	76	95%	72	6,722	485
Welcome, Milton Road	139	95%	132	6,722	888
One Stop, Hills Road	172	100%	172	5,000	860
One Stop, Ditton Lane	139	100%	139	5,000	695
Budgens, Adkins Corner/Perne Road	514	95%	488	3,342	1,632
Budgens, Arbury Road	789	95%	750	3,342	2,505
Co-Op, Milton Road	139	95%	132	6,722	888
Co-op, Girton Road	114	95%	108	6,722	728
Co-op, Chesterton Road	187	95%	178	6,722	1,194
Co-Op, Mill Road	514	95%	488	6,722	3,282
SUB TOTAL			**5,024**	**5,999**	**30,138**
OUT OF CENTRE					
Tesco, Cheddars Lane	*4,993*		2,673	12,894	34,466
Asda, Beehive Centre	3,716	70%	2,601	14,352	37,332
Sainsburys, Coldham Lane	4,265	70%	2,986	9,744	29,091
Waitrose, Trumpington	2,976	90%	2,678	11,601	31,072
SUB TOTAL			**10,938**	**12,064**	**131,961**
TOTAL CAMBRIDGE CITY			**20,064**	**9,901**	**198,654**

Source: Cambridge City Council/IGD

TABLE 15
SOUTH CAMBRIDGESHIRE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sqm net)	Total Potential Turnover (£000s)
MAJOR RURAL CENTRE STORES					
Morrisons, Cambourne	2,992	90%	2,693	11,173	30,087
Budgens, Sawston	690	95%	656	3,342	2,191
Spar, Sawston	376	95%	357	5,251	1,876
Tesco Express, Histon	220	95%	209	12,894	2,695
Co-op, Cottenham	238	95%	226	6,722	1,520
One Stop, Milton	139	100%	139	5,000	695
Co-op, Histon	185	95%	176	6,722	1,181
Co-Op, Great Shelford	155	95%	147	6,722	990
Co-Op, Fulbourne	323	95%	307	6,722	2,063
SUB TOTAL			**4,909**	**8,819**	**43,297**
OUT OF CENTRE					
Tesco, Bar Hill	*9,392*		4,031	12,894	51,976
Tesco, Milton	*2,327*		2,244	12,894	28,934
Tesco, Yarrow Road	*3,613*		2,458	12,894	31,693
SUB TOTAL			**8,733**	**12,894**	**112,603**
TOTAL SOUTH CAMBRIDGESHIRE			**13,642**	**11,428**	**155,900**

Source:South Cambridgeshire District Council/IGD

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sqm net)	Total Potential Turnover (£000s)
TOTAL CAMBRIDGE SUB REGION			**33,706**	**10,519**	**354,554**

TABLE 16
RETAIL CONVENIENCE COMMITMENTS

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience (sqm)	Company Average Sales (£ per sq m net)	Average Turnover 2008 (£000s)	Average Turnover 2011 (£000s)	Average Turnover 2016 (£000s)	Average Turnover 2021 (£000s)
Cambridge City Council								
Land to the north of Unit 3, 11 High Street, Cherry Hinton, Cambridge (Ref: C/00071/07)	35	95%	33	2,500	83	83	84	86
186-188 High Street, East Chesterton, Cambridge (Ref: C/00987/06)	24	95%	23	2,500	57	57	58	59
TOTAL	**59**		**56**		**140**	**140**	**142**	**144**
South Cambridgeshire District Council								
Land at Arbury Camp, King's Hedges Road, Impington, Cambridge (Ref: S/02379/01)	807	95%	767	5,000	3,833	3,833	3,891	3,950
Land at 23 Church Street, Willingham, Cambridge (Ref: S/00898/06)	63	95%	60	2,500	150	150	152	154
TOTAL	**870**		**827**		**3,983**	**3,983**	**4,043**	**4,104**

Source: Cambridge City Council, South Cambridgeshire District Council and Cambridgeshire County Council
Assumes 0% floorspace efficiency to 2011, 0.3% beyond 2011

TABLE 17
RETAIL PIPELINE - CONVENIENCE GOODS

	Net Flsp (sqm)	Co Average Sales (£ per sqm net)	Total Turnover 2008 (£000s)	Total Turnover 2011 (£000s)	Total Turnover 2016 (£000s)	Total Turnover 2021 (£000s)
South Cambridgeshire						
Northstowe Town Centre	5,525	10,000	55,250	55,250	56,084	56,930
Northstowe Local Centres	1,100	5,000	5,500	5,500	5,583	5,667
Cambridge City						
East Cambridge	3,000	10,000	30,000	30,000	30,453	30,912
Cambridge East Local Centres	1,200	5,000	6,000	6,000	6,091	6,182
Station Area	507	5,000	2,535	2,535	2,573	2,612
Southern Fringe	341	5,000	1,705	1,705	1,731	1,757
Land between Madingley Road and Huntingdon Road (NW AAP)	1,625	5,000	8,125	8,125	8,248	8,372
Land between Huntingdon Road and Histon Road (NIAB & NIAB Extra Site)	1,170	5,000	5,850	5,850	5,938	6,028
TOTAL	14,468		114,965	114,965	116,700	118,461

Source: Cambridge City Council, South Cambridgeshire District Council and Cambridgeshire County Council
Assumes 0% floorspace efficiency to 2011, 0.3% beyond 2011

TABLE 17A
RETAIL PIPELINE - CONVENIENCE GOODS PHASING

	Total Turnover 2011 (£000s)	Total Turnover 2016 (£000s)	Total Turnover 2021 (£000s)
South Cambridgeshire			
Northstowe Town Centre	0	56,084	56,930
Northstowe Local Centres	0	2,538	5,667
Cambridge City			
East Cambridge	0	0	30,912
Cambridge East Local Centres	0	4,060	6,182
Station Area	0	2,573	2,612
Southern Fringe	0	0	1,757
Land between Madingley Road and Huntingdon Road	0	8,248	8,372
Land between Huntingdon Road and Histon Road (NIAB Site)	0	5,938	6,028
TOTAL	0	79,441	118,461

Source: Cambridge City Council, South Cambridgeshire District Council and Cambridgeshire County Council
Assumes 0% floorspace efficiency to 2011, 0.3% beyond 2011

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 18
FUTURE SHOP GLOBAL FLOORSPACE CAPACITY FOR CAMBRIDGE CITY COUNCIL

	CONVENIENCE GOODS			
	2008	2011	2016	2021
Total Convenience Goods Turnover in Cambridge City Council (£000)	203,426	209,514	243,569	269,460
Existing Shop Floorspace (sqm net)	20,064	20,064	20,064	20,064
Sales per sqm net £	10,139	9,901	10,051	10,202
Sales from Existing Floorspace (£000)	203,426	198,654	201,652	204,695
Sales from Committed Floorspace (£000)	0	140	142	144
Residual Spending to Support new shops (£000)	0	10,720	41,775	64,620
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,151	10,304
Capacity for new floorspace (sqm net)	0	1,072	4,115	6,271

Assumes 0.8% sales density growth per annum

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

	CONVENIENCE GOODS			
	2008	2011	2016	2021
Total Convenience Goods Turnover in South Cambridgeshire District (£000)	179,855	179,492	203,346	227,516
Existing Shop Floorspace (sqm net)	13,642	13,642	13,642	13,642
Sales per sqm net £	13,183	11,428	11,600	11,775
Sales from Existing Floorspace (£000)	179,855	155,900	158,252	160,640
Sales from Committed Floorspace (£000)	0	3,983	4,043	4,104
Residual Spending to Support new shops (£000)	0	19,610	41,051	62,771
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,151	10,304
Capacity for new floorspace (sqm net)	0	1,961	4,044	6,092

Assumes 0% floorspace efficiency to 2011, 0.3% beyond 2011

CAPACITY PROJECTIONS: CONVENIENCE GOODS
TABLE 20
FUTURE SHOP GLOBAL FLOORSPACE CAPACITY FOR CAMBRIDGE SUB REGION

	CONVENIENCE GOODS			
	2008	2011	2016	2021
Total Convenience Goods Turnover in Cambridge Sub Region (£000)	383,280	389,007	446,915	496,976
Existing Shop Floorspace (sqm net)	33,706	33,706	33,706	33,706
Sales per sqm net £	11,371	10,519	10,678	10,839
Sales from Existing Floorspace (£000)	383,280	354,554	359,905	365,336
Sales from Committed Floorspace (£000)	0	4,123	4,185	4,248
Residual Spending to Support new shops (£000)	0	30,329	82,826	127,392
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,151	10,304
Capacity for new floorspace (sqm net)	0	3,033	8,159	12,363

Assumes 0% floorspace efficiency to 2011, 0.3% beyond 2011

TABLE 21
FUTURE SHOP GLOBAL FLOORSPACE CAPACITY FOR CAMBRIDGE SUB REGION WITH PIPELINE

	CONVENIENCE GOODS			
	2008	2011	2016	2021
Total Convenience Goods Turnover in Cambridge Sub Region (£000)	383,280	389,007	446,915	496,976
Existing Shop Floorspace (sqm net)	33,706	33,706	33,706	33,706
Sales per sqm net £	11,371	10,519	10,678	10,839
Sales from Existing Floorspace (£000)	383,280	354,554	359,905	365,336
Sales from Committed Floorspace (£000)	0	4,123	83,626	122,709
Residual Spending to Support new shops (£000)	0	30,329	3,385	8,931
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,151	10,304
Capacity for new floorspace (sqm net)	0	3,033	333	867

Assumes 0% floorspace efficiency to 2011, 0.3% beyond 2011

Appendix 3 – North West Cambridge Convenience Capacity Projections

Table 1: Population Projections

	Number of persons				Growth Rate (%)			
	2008	2011	2016	2021	2008-2011	2011-2016	2016-2021	2008-2021
PCA	43,978	45,051	54,870	63,744	2.4%	21.8%	16.2%	44.9%
SCA	158,800	169,295	191,502	199,378	6.6%	13.1%	4.1%	25.6%
Total	**202,778**	**214,346**	**246,372**	**263,122**	-	-	-	-

Sources:
2001 Census of Population
Growth rates from 2008 Study (Zones 1 to 4); adjustments made to population growth derived from dwelling pipeline

Table 2: Convenience Goods Expenditure Per Capita (2006 Prices)

Expenditure Per Capita	2007	2008	2011	2016	2021	Growth 2008-2011	Growth 2008-2016	Growth 2008-2021
PCA	1,549	1,559	1,545	1,592	1,649	-0.9%	2.1%	5.7%
SCA	1,537	1,548	1,534	1,580	1,636	-0.9%	2.1%	5.7%

Sources:
Experian local estimates of 2007 convenience goods expenditure per capita
Excluding special forms of trading - 2.0% in 2009, 2.2% in 2010, 2.3% in 2011 and 2012, 2.5% in 2013, 2.6% in 2014 and 2.8% in 2015 and beyond
Experian Business Strategies - forecast annual growth rates for 2007 to 2011 (0.9%, -0.5%, -0.1% and 0.2%)
Experian Business Strategies - ultra long term growth rate adopted beyond 2011 (0.7% per annum)

Table 3: Total Available Convenience Goods Expenditure (£m - 2006 Prices)

Zone	2008	2011	2016	2021	Growth 2008-2011	Growth 2011-2016	Growth 2016-2021	Growth 2008-2021
PCA	68.6	69.6	87.4	105.1	1.5%	25.5%	20.3%	53.2%
SCA	245.8	259.7	302.6	326.3	5.6%	16.5%	7.8%	32.7%
Total	**£314.4**	**£329.3**	**£390.0**	**£431.3**	**4.7%**	**18.4%**	**10.6%**	**37.2%**

Sources: *Table 1 and Table 2*

Table 4: Convenience Shopping Penetration Rates 2008

Centre/Facilities	PCA	SCA
PCA		
Aldi, Histon Road	4.0%	0.7%
Budgens, Arbury Road	1.4%	0.0%
Co-op (East & Central), Girton Road	1.9%	0.0%
Co-op (East & Central), Histon Road	2.7%	0.4%
Iceland, Histon Road	0.5%	0.2%
Local Stores, Histon	1.4%	0.1%
One Stop, Carlton Terrace	0.5%	0.4%
Tesco Express, High Street, Histon	1.0%	2.1%
Tesco Express, Campkin Road	2.7%	0.7%
PCA Sub-Total	**16%**	**5%**
Oustide PCA		
Asda, Beehive Centre, Coldhams Lane, Cambridge	2.5%	2.6%
Budgens, Adkins Corner, Perne Road, Cambridge	0.5%	1.3%
Co-Op (East & Central), High Street, Cottenham	0.0%	1.0%
Co-Op (East & Central), Hills Road, Cambridge	1.3%	2.7%
Co-Op (East & Central), Mill Road, Cambridge	1.3%	0.4%
Local Stores, Cambridge	2.4%	3.1%
Marks & Spencer, Grafton Centre, Cambridge	0.0%	1.1%
Marks & Spencer, Sidney Street, Cambridge	1.0%	2.2%
Morrisons, Broad Street, Cambourne, Cambridge	1.3%	4.1%
Sainsbury'S, Brooks Road, Coldams Lane, Cambridge	5.1%	13.8%
Sainsbury'S, Sidney Street, Cambridge	5.3%	3.7%
Tesco Express, Rectory Terrace, High Street, Cherry Hint	0.5%	3.0%
Tesco Extra, Old North Road, Royston	1.4%	2.2%
Tesco Extra, Viking Way, Bar Hill, Cambridge	19.1%	11.1%
Tesco, Cambridge Road Industrial Estate, Milton, Cambri	23.5%	11.2%
Tesco, Cheddars Lane, Newmarket Road, Cambridge	8.6%	5.6%
Tesco, Fordham Road, Newmarket	1.8%	2.1%
Tesco, Yarrow Road, Cherry Hinton, Cambridge	0.0%	4.8%
Waitrose, Fred Archer Way, Newmarket	1.3%	0.4%
Waitrose, Hauxton Road, Trumpington, Cambridge	3.8%	9.3%
Other outside PCA	3.4%	9.5%
Other Sub-Total	**84%**	**95%**
Total	**100%**	**100%**

Source: Cambridge Sub Region: Household Survey Results

Table 5: Convenience Expenditure 2008 £Million

Centre/Facilities	PCA	SCA	Total Expenditure
Expenditure 2008	**£68.6**	**£245.8**	**£314.4**
PCA			
Aldi, Histon Road	£2.7	£1.8	£4.6
Budgens, Arbury Road	£1.0	£0.0	£1.0
Co-op (East & Central), Girton Road	£1.3	£0.0	£1.3
Co-op (East & Central), Histon Road	£1.9	£1.0	£2.9
Iceland, Histon Road	£0.3	£0.5	£0.8
Local Stores, Histon	£1.0	£0.2	£1.2
One Stop, High Street, Chesterton, Cambridge	£0.3	£1.1	£1.4
Tesco Express, High Street, Histon	£0.7	£5.3	£5.9
Tesco Express, Campkin Road	£1.9	£1.6	£3.5
PCA Sub-Total	**£11.1**	**£11.5**	**£22.6**
Oustide PCA			
Asda, Beehive Centre, Coldhams Lane, Cambridge	£1.7	£6.5	£8.3
Budgens, Adkins Corner, Perne Road, Cambridge	£0.3	£3.1	£3.5
Co-op (East & Central), High Street, Cottenham	£0.0	£2.4	£2.4
Co-op (East & Central), Hills Road, Cambridge	£0.9	£6.6	£7.5
Co-op (East & Central), Mill Road, Cambridge	£0.9	£1.1	£2.0
Local Stores, Cambridge	£1.6	£7.7	£9.3
Marks & Spencer, Grafton Centre, Cambridge	£0.0	£2.8	£2.8
Marks & Spencer, Sidney Street, Cambridge	£0.7	£5.3	£6.0
Morrisons, Broad Street, Cambourne, Cambridge	£0.9	£10.2	£11.0
Sainsbury'S, Brooks Road, Coldams Lane, Cambridge	£3.5	£34.0	£37.5
Sainsbury'S, Sidney Street, Cambridge	£3.6	£9.1	£12.7
Tesco Express, Rectory Terrace, High Street, Cherry Hinton,	£0.3	£7.5	£7.8
Tesco Extra, Old North Road, Royston	£1.0	£5.3	£6.3
Tesco Extra, Viking Way, Bar Hill, Cambridge	£13.1	£27.3	£40.3
Tesco, Cambridge Road Industrial Estate, Milton, Cambridge	£16.1	£27.5	£43.6
Tesco, Cheddars Lane, Newmarket Road, Cambridge	£5.9	£13.8	£19.7
Tesco, Fordham Road, Newmarket	£1.2	£5.2	£6.4
Tesco, Yarrow Road, Cherry Hinton, Cambridge	£0.0	£11.7	£11.7
Waitrose, Fred Archer Way, Newmarket	£0.9	£1.0	£1.9
Waitrose, Hauxton Road, Trumpington, Cambridge	£2.6	£22.8	£25.5
Other outside PCA	£2.3	£23.4	£25.7
Other Sub-Total	**£57.5**	**£234.3**	**£291.8**
Total	**£68.6**	**£245.8**	**£314.4**

Source: *Table 3 and 4*
Assumes constant market share

Table 6: Convenience Expenditure 2011 £Million

Centre/Facilities	PCA	SCA	Total Expenditure
Expenditure 2011	**£69.6**	**£259.7**	**£329.3**
PCA			
Aldi, Histon Road	£2.8	£1.9	£4.7
Budgens, Arbury Road	£1.0	£0.0	£1.0
Co-op (East & Central), Girton Road	£1.3	£0.0	£1.3
Co-op (East & Central), Histon Road	£1.9	£1.1	£3.0
Iceland, Histon Road	£0.3	£0.5	£0.9
Local Stores, Histon	£1.0	£0.2	£1.2
One Stop, Carlton Terrace	£0.3	£1.1	£1.5
Tesco Express, High Street, Histon	£0.7	£5.6	£6.2
Tesco Express, Campkin Road	£1.9	£1.7	£3.6
PCA Sub-Total	**£11.2**	**£12.2**	**£23.4**
Oustide PCA			
Asda, Beehive Centre, Coldhams Lane, Cambridge	£1.8	£6.9	£8.7
Budgens, Adkins Corner, Perne Road, Cambridge	£0.3	£3.3	£3.7
Co-Op (East & Central), High Street, Cottenham	£0.0	£2.5	£2.5
Co-Op (East & Central), Hills Road, Cambridge	£0.9	£7.0	£7.9
Co-Op (East & Central), Mill Road, Cambridge	£0.9	£1.2	£2.1
Local Stores, Cambridge	£1.7	£8.1	£9.8
Marks & Spencer, Grafton Centre, Cambridge	£0.0	£3.0	£3.0
Marks & Spencer, Sidney Street, Cambridge	£0.7	£5.6	£6.3
Morrisons, Broad Street, Cambourne, Cambridge	£0.9	£10.7	£11.6
Sainsbury'S, Brooks Road, Coldams Lane, Cambridge	£3.5	£36.0	£39.5
Sainsbury'S, Sidney Street, Cambridge	£3.7	£9.6	£13.3
Tesco Express, Rectory Terrace, High Street, Cherry Hinton,	£0.3	£7.9	£8.2
Tesco Extra, Old North Road, Royston	£1.0	£5.6	£6.6
Tesco Extra, Viking Way, Bar Hill, Cambridge	£13.3	£28.8	£42.1
Tesco, Cambridge Road Industrial Estate, Milton, Cambridge	£16.4	£29.0	£45.4
Tesco, Cheddars Lane, Newmarket Road, Cambridge	£6.0	£14.6	£20.6
Tesco, Fordham Road, Newmarket	£1.2	£5.5	£6.7
Tesco, Yarrow Road, Cherry Hinton, Cambridge	£0.0	£12.4	£12.4
Waitrose, Fred Archer Way, Newmarket	£0.9	£1.0	£1.9
Waitrose, Hauxton Road, Trumpington, Cambridge	£2.7	£24.1	£26.8
Other outside PCA	£2.3	£24.7	£27.1
Other Sub-Total	**£58.4**	**£247.5**	**£305.9**
Total	**£69.6**	**£259.7**	**£329.3**

Source: *Table 3 and 4*
Assumes constant market share

Table 7: Convenience Expenditure 2016 £Million

Centre/Facilities	PCA	SCA	Total Expenditure
Expenditure 2016	**£87.4**	**£302.6**	**£390.0**
PCA			
Aldi, Histon Road	£3.5	£2.3	£5.7
Budgens, Arbury Road	£1.3	£0.0	£1.3
Co-op (East & Central), Girton Road	£1.7	£0.0	£1.7
Co-op (East & Central), Histon Road	£2.4	£1.3	£3.6
Iceland, Histon Road	£0.4	£0.6	£1.1
Local Stores, Histon	£1.3	£0.3	£1.5
One Stop, Carlton Terrace	£0.4	£1.3	£1.7
Tesco Express, High Street, Histon	£0.8	£6.5	£7.3
Tesco Express, Campkin Road	£2.4	£2.0	£4.4
PCA Sub-Total	**£14.1**	**£14.2**	**£28.3**
Oustide PCA			
Asda, Beehive Centre, Coldhams Lane, Cambridge	£2.2	£8.0	£10.2
Budgens, Adkins Corner, Perne Road, Cambridge	£0.4	£3.9	£4.3
Co-Op (East & Central), High Street, Cottenham	£0.0	£2.9	£2.9
Co-Op (East & Central), Hills Road, Cambridge	£1.1	£8.2	£9.3
Co-Op (East & Central), Mill Road, Cambridge	£1.1	£1.4	£2.5
Local Stores, Cambridge	£2.1	£9.4	£11.5
Marks & Spencer, Grafton Centre, Cambridge	£0.0	£3.4	£3.4
Marks & Spencer, Sidney Street, Cambridge	£0.8	£6.5	£7.4
Morrisons, Broad Street, Cambourne, Cambridge	£1.1	£12.5	£13.6
Sainsbury'S, Brooks Road, Coldams Lane, Cambridge	£4.4	£41.9	£46.3
Sainsbury'S, Sidney Street, Cambridge	£4.6	£11.2	£15.8
Tesco Express, Rectory Terrace, High Street, Cherry Hinton,	£0.4	£9.2	£9.6
Tesco Extra, Old North Road, Royston	£1.3	£6.5	£7.8
Tesco Extra, Viking Way, Bar Hill, Cambridge	£16.7	£33.6	£50.2
Tesco, Cambridge Road Industrial Estate, Milton, Cambridge	£20.6	£33.8	£54.4
Tesco, Cheddars Lane, Newmarket Road, Cambridge	£7.5	£17.0	£24.5
Tesco, Fordham Road, Newmarket	£1.5	£6.4	£7.9
Tesco, Yarrow Road, Cherry Hinton, Cambridge	£0.0	£14.4	£14.4
Waitrose, Fred Archer Way, Newmarket	£1.1	£1.2	£2.3
Waitrose, Hauxton Road, Trumpington, Cambridge	£3.3	£28.1	£31.4
Other outside PCA	£2.9	£28.8	£31.8
Other Sub-Total	**£73.3**	**£288.4**	**£361.7**
Total	**£87.4**	**£302.6**	**£390.0**

Source: *Table 3 and 4*
Assumes constant market share

Table 8: Convenience Expenditure 2021 £Million

Centre/Facilities	PCA	SCA	Total Expenditure
Expenditure 2021	**£105.1**	**£326.3**	**£431.3**
PCA			
Aldi, Histon Road	£4.2	£2.4	£6.6
Budgens, Arbury Road	£1.5	£0.0	£1.5
Co-op (East & Central), Girton Road	£2.0	£0.0	£2.0
Co-op (East & Central), Histon Road	£2.9	£1.4	£4.2
Iceland, Histon Road	£0.5	£0.7	£1.2
Local Stores, Histon	£1.5	£0.3	£1.8
One Stop, Carlton Terrace	£0.5	£1.4	£1.9
Tesco Express, High Street, Histon	£1.0	£7.0	£8.0
Tesco Express, Campkin Road	£2.9	£2.2	£5.0
PCA Sub-Total	**£17.0**	**£15.3**	**£32.3**
Oustide PCA			
Asda, Beehive Centre, Coldhams Lane, Cambridge	£2.7	£8.6	£11.3
Budgens, Adkins Corner, Perne Road, Cambridge	£0.5	£4.2	£4.7
Co-Op (East & Central), High Street, Cottenham	£0.0	£3.1	£3.1
Co-Op (East & Central), Hills Road, Cambridge	£1.3	£8.8	£10.1
Co-Op (East & Central), Mill Road, Cambridge	£1.3	£1.5	£2.8
Local Stores, Cambridge	£2.5	£10.2	£12.7
Marks & Spencer, Grafton Centre, Cambridge	£0.0	£3.7	£3.7
Marks & Spencer, Sidney Street, Cambridge	£1.0	£7.1	£8.1
Morrisons, Broad Street, Cambourne, Cambridge	£1.3	£13.5	£14.8
Sainsbury'S, Brooks Road, Coldams Lane, Cambridge	£5.3	£45.2	£50.5
Sainsbury'S, Sidney Street, Cambridge	£5.5	£12.1	£17.6
Tesco Express, Rectory Terrace, High Street, Cherry Hinton,	£0.5	£9.9	£10.4
Tesco Extra, Old North Road, Royston	£1.5	£7.0	£8.6
Tesco Extra, Viking Way, Bar Hill, Cambridge	£20.0	£36.2	£56.2
Tesco, Cambridge Road Industrial Estate, Milton, Cambridge	£24.7	£36.5	£61.2
Tesco, Cheddars Lane, Newmarket Road, Cambridge	£9.0	£18.3	£27.3
Tesco, Fordham Road, Newmarket	£1.8	£6.9	£8.7
Tesco, Yarrow Road, Cherry Hinton, Cambridge	£0.0	£15.5	£15.5
Waitrose, Fred Archer Way, Newmarket	£1.3	£1.3	£2.6
Waitrose, Hauxton Road, Trumpington, Cambridge	£4.0	£30.3	£34.3
Other outside PCA	£3.5	£31.1	£34.6
Other Sub-Total	**£88.1**	**£310.9**	**£399.1**
Total	**£105.1**	**£326.3**	**£431.3**

Source: *Table 3 and 4*
Assumes constant market share

Table 9: Summary of Convenience Turnover/Floorspace Projections 2008 to 2021 (£Million)

	2008	2011	2016	2021
Available Expenditure in PCA				
Aldi, Histon Road	£4.6	£4.7	£5.7	£6.6
Budgens, Arbury Road	£1.0	£1.0	£1.3	£1.5
Co-op (East & Central), Girton Road	£1.3	£1.3	£1.7	£2.0
Co-op (East & Central), Histon Road	£2.9	£3.0	£3.6	£4.2
Iceland, Histon Road	£0.8	£0.9	£1.1	£1.2
Local Stores, Histon (Co-op)	£1.2	£1.2	£1.5	£1.8
One Stop, Carlton Terrace	£1.4	£1.5	£1.7	£1.9
Tesco Express, High Street, Histon	£5.9	£6.2	£7.3	£8.0
Tesco Express, Campkin Road	£3.5	£3.6	£4.4	£5.0
Total	**£22.6**	**£23.4**	**£28.3**	**£32.3**
Benchmark Turnover of Existing Facilities				
Aldi, Histon Road	£2.4	£2.4	£2.4	£2.5
Budgens, Arbury Road	£2.5	£2.5	£2.5	£2.6
Co-op (East & Central), Girton Road	£0.7	£0.7	£0.7	£0.8
Co-op (East & Central), Histon Road	£2.3	£2.3	£2.3	£2.4
Iceland, Histon Road	£2.3	£2.3	£2.3	£2.4
Local Stores, Histon (Co-op)	£1.2	£1.2	£1.2	£1.2
One Stop, Carlton Terrace	£0.7	£0.7	£0.7	£0.7
Tesco Express, High Street, Histon	£2.7	£2.7	£2.7	£2.8
Tesco Express, Campkin Road	£2.5	£2.5	£2.5	£2.5
Total	**£17.3**	**£17.3**	**£17.5**	**£17.8**
Surplus/ Deficit Expenditure				
Aldi, Histon Road	£2.2	£2.3	£3.3	£4.1
Budgens, Arbury Road	-£1.5	-£1.5	-£1.3	-£1.1
Co-op (East & Central), Girton Road	£0.6	£0.6	£0.9	£1.3
Co-op (East & Central), Histon Road	£0.6	£0.7	£1.3	£1.8
Iceland, Histon Road	-£1.5	-£1.4	-£1.3	-£1.2
Local Stores, Histon (Co-op)	£0.0	£0.0	£0.3	£0.6
One Stop, High Street, Chesterton, Cambridge	£0.8	£0.8	£1.1	£1.3
Tesco Express, High Street, Histon	£3.2	£3.5	£4.6	£5.2
Tesco Express, Campkin Road	£1.0	£1.1	£1.9	£2.5
Total	**£5.4**	**£6.2**	**£10.8**	**£14.5**
Floorspace Commitments in the PCA				
Orchard Park	£0.0	£3.8	£3.9	£3.9
Residual Expenditure Capacity	**£5.4**	**£2.3**	**£6.9**	**£10.5**
Turnover Density for New Floorspace £ per Sq M				
Smaller foodstore operator	£5,000	£5,000	£5,075	£5,152
Larger foodstore operator	£10,000	£10,000	£10,151	£10,304
Convenience Sales Floorspace (Sq M Net)				
Smaller foodstore operator	1,071	468	1,359	2,047
Larger foodstore operator	535	234	680	1,023

Sources: Table 14 (Appendix 2), Tables 5 to 8 (Appendix 3)
Allowance for sales density growth post 2011 (0.3% p.a.)

Table 10: Scenario 1 - Summary of Convenience Turnover/Floorspace Projections 2008 to 2021 including pipeline development (£Million)

	2008	2011	2016	2021
Total Convenience Expenditure in PCA (£m)	22.6	23.4	28.3	32.3
Benchmark Turnover of Existing Convenience Floorspace (£m)	17.3	17.3	17.5	17.8
Turnover of Committed Convenience Floorspace (£m)	0.0	3.8	3.9	3.9
Pipeline Developments				
Land between Madingley Road and Huntingdon Road (NW AAP Site)	0.0	0.0	8.2	8.4
Land between Huntingdon Road and Histon Road (NIAB Site)	0.0	0.0	5.9	6.0
Surplus/ Deficit Expenditure	5.4	2.3	-7.3	-3.9
Turnover Density for New Floorspace £ per Sq M				
Large foodstore operator	£10,000	£10,000	£10,151	£10,304
Small foodstore operator	£5,000	£5,000	£5,075	£5,152
Convenience Sales Floorspace (Sq M Net)				
Large foodstore operator	535	234	-718	-374
Small foodstore operator	1,071	468	-1,436	-748

Sources: Table 14, 17 (Appendix 2b), Tables 1, 5 to 8 (Appendix 3)

Table 11: Scenario 2 - Market Share increases

	2008	2011	2016	2021
Baseline benchmark turnover of existing stores in PCA (£m)	£17.3	£17.3	£17.5	£17.8
Turnover of Commitments in PCA (£m)	£0.0	£3.8	£3.9	£3.9
Turnover of Pipeline Developments in PCA (£m)	£0.0	£0.0	£14.2	£14.4
Total turnover of New Floorspace in PCA (£m)	£0.0	£3.8	£18.1	£18.3
Total turnover of Existing and New Floorspace in PCA (£m)	£17.3	£21.1	£35.6	£36.1
Increase in turnover (%) (i.e. Total New Floorspace/Baseline Benchmark)	0%	22%	103%	103%
Market share - PCA baseline	16%	16%	16%	16%
Market share - SCA baseline	5%	5%	5%	5%
Market share - PCA total	16%	20%	33%	33%
Market share - SCA total	5%	6%	10%	10%

Proposed floorspace includes committed floorspace at Orchard Park, and pipeline floorspace at NW AAP & NIAB Sites

Table 12: Scenario 2 - Summary of Convenience Turnover/Floorspace Projections 2008 to 2021 with Market Share Increase

	2008	2011	2016	2021
PCA Convenience Expenditure in PCA (£m)	11.1	13.7	28.7	34.5
SCA Convenience Expenditure in PCA (£m)	11.5	14.9	28.9	31.1
Benchmark Turnover of Existing Convenience Floorspace (£m)	17.3	17.3	17.5	17.8
Turnover of Committed Convenience Floorspace (£m)	0.0	3.8	3.9	3.9
Turnover of Pipeline Convenience Floorspace (£m)	0.0	0.0	14.2	14.4
Surplus/ Deficit Expenditure	5.4	7.5	21.9	29.5
Turnover Density for New Floorspace £ per Sq M				
Large foodstore operator	£10,000	£10,000	£10,151	£10,304
Small foodstore operator	£5,000	£5,000	£5,075	£5,152
Convenience Sales Floorspace (Sq M Net)				
Large foodstore operator	535	754	2,160	2,859
Small foodstore operator	1,071	1,508	4,319	5,717

Sources: Table 14, 17 (Appendix 2b), Tables 1, 5 to 8, 11 (Appendix 3)

Table 13: Scenario 3 - Market Share increases

		2008	2011	2016	2021
Baseline market share	PCA SCA	16% 5%	16% 5%	16% 5%	16% 5%
Market share achievable by main food store	PCA SCA	0% 0%	0% 0%	18% 9%	18% 9%
Market share decrease from existing stores (allowance for trade diversion)	PCA SCA	0% 0%	0% 0%	-2% -1%	-2% -1%
New market share in PCA	PCA SCA	16% 5%	16% 5%	32% 13%	32% 13%

Table 14: Scenario 3 - Summary of Convenience Turnover/Floorspace Projections 2008 to 2021 with Market Share Increase

	2008	2011	2016	2021
PCA Convenience Expenditure in PCA (£m)	11.1	11.2	28.1	33.8
SCA Convenience Expenditure in PCA (£m)	11.5	12.2	38.4	41.4
Benchmark Turnover of Existing Convenience Floorspace (£m)	17.3	17.3	17.5	17.8
Turnover of Committed Convenience Floorspace (£m)	0.0	3.8	3.9	3.9
Turnover of Pipeline Convenience Floorspace (£m)	0.0	0.0	14.2	14.4
Surplus/ Deficit Expenditure	5.4	2.3	30.9	39.1
Turnover Density for New Floorspace £ per Sq M Large foodstore operator	£10,000	£10,000	£10,151	£10,304
Convenience Sales Floorspace (Sq M Net) Large foodstore operator	535	234	3,044	3,791

Sources: Table 14, 17 (Appendix 2b), Tables 1, 5 to 8, 13 (Appendix 3)

Appendix 4 – North West Cambridge Convenience Capacity Assessment 2021 'Options'

Table 1: Option 1 - Main foodstore of 2, 500 sqm net in one centre at 2021

Proposed Main Foodstore Allowance (Sales Density of £12,000 per sq m at 2011)	Small Foodstore Committed/Pipeline (Sales Density of £5,000 per sqm at 2011)			Main Foodstore Committed/Pipeline (Sales Density of £10,000 per sqm at 2011)		
	Orchard Park	NIAB	NW AAP (University)	Orchard Park	NIAB	NW AAP (University)
[1] Total Convenience Turnover Expenditure in PCA (£M)	75.2			75.2		
[2] Benchmark Turnover of Existing Floorspace in PCS (£M)	17.8			17.8		
[3] Surplus Expenditure (£M) [1 - 2]	57.4			57.4		
[4] Main Foodstore Allowance (£M) (2,500 sq m net @ £12,400 per sqm)	31.0			31.0		
[5] Turnover of Committed/Pipeline Convenience Floorspace (£M)	3.9	6.0	8.4	7.9	12.1	16.7
[6] Allowance for small convenience shops (£M)	1.0	1.0	1.0	1.0	1.0	1.0
[A] Turnover of Centres if Main Foodstore provided at Orchard Park (£M) [4 or 5 + 6]	32.0	7.0	9.4	32.0	13.1	17.7
[B] Turnover of Centres if Main Foodstore provided at NIAB (£M) [4 or 5 + 6]	4.9	32.0	9.4	8.9	32.0	17.7
[C] Turnover of Centres if Main Foodstore provided at NW AAP (University) (£M) [4 or 5 + 6]	4.9	7.0	32.0	8.9	13.1	32.0
[D] Maximum Residual Turnover (£M) [3 - (Total Sum of A, B or C)]	9.0	11.1	13.5	-5.4	-1.2	3.4

Table 2: Option 2 - Main foodstore of 3,000 sqm net in one centre at 2021

Proposed Main Foodstore Allowance (Sales Density of £12,000 per sq m at 2011)	Small Foodstore Committed/Pipeline (Sales Density of £5,000 per sqm at 2011)			Main Foodstore Committed/Pipeline (Sales Density of £10,000 per sqm at 2011)		
	Orchard Park	NIAB	NW AAP (University)	Orchard Park	NIAB	NW AAP (University)
[1] Total Convenience Turnover Expenditure in PCA (£M)	75.2			75.2		
[2] Benchmark Turnover of Existing Floorspace in PCS (£M)	17.8			17.8		
[3] Surplus Expenditure (£M) [1 - 2]	57.4			57.4		
[4] Main Foodstore Allowance (£M) (3,000 sq m net @ £12,400 per sqm)	37.2			37.2		
[5] Turnover of Committed/Pipeline Convenience Floorspace (£M)	3.9	6.0	8.4	7.9	12.1	16.7
[6] Allowance for small convenience shops (£M)	1.0	1.0	1.0	1.0	1.0	1.0
[A] Turnover of Centres if Main Foodstore provided at Orchard Park (£M) [4 or 5 + 6]	38.2	7.0	9.4	38.2	13.1	17.7
[B] Turnover of Centres if Main Foodstore provided at NIAB (£M) [4 or 5 + 6]	4.9	38.2	9.4	8.9	38.2	17.7
[C] Turnover of Centres if Main Foodstore provided at NW AAP (University) (£M) [4 or 5 + 6]	4.9	7.0	38.2	8.9	13.1	38.2
[D] Maximum Residual Turnover (£M) [3 - (Total Sum of A, B or C)]	2.8	4.9	7.3	-11.6	-7.4	-2.8

Table 3: Option 3 - Residual expenditure to be split between three centres and combined with committed/pipeline at 2021

	Small Foodstore Committed/Pipeline (Sales Density of £5,000 per sqm at 2011)			Main Foodstore Committed/Pipeline (Sales Density of £10,000 per sqm at 2011)		
	Orchard Park	NIAB	NW AAP (University)	Orchard Park	NIAB	NW AAP (University)
[1] Total Convenience Turnover Expenditure in PCA (£M)		75.2			75.2	
[2] Benchmark Turnover of Existing Floorspace in PCS (£M)		17.8			17.8	
[3] Surplus Expenditure (£M) [1 - 2]		57.4			57.4	
[4] Other Shops in North West Cambridge (£M)		5.0			5.0	
[5] Allowance for small convenience shops (£M)	1.0	1.0	1.0	1.0	1.0	1.0
[6] Turnover of Committed/Pipeline Convenience Floorspace (£M)	3.9	6.0	8.4	7.9	12.1	16.7
[7} Residual Turnover allowing for commitments (£M)		31.1			12.7	
[A] Turnover of each centre (£M)	15.3	17.4	19.8	13.1	17.3	21.9

Table 4: Option 4 - Residual expenditure split between two centres and combined with committed/pipeline at 2021

	Small Foodstore Committed/Pipeline (Sales Density of £5,000 per sqm at 2011)			Main Foodstore Committed/Pipeline (Sales Density of £10,000 per sqm at 2011)		
	Orchard Park	NIAB	NW AAP (University)	Orchard Park	NIAB	NW AAP (University)
[1] Total Convenience Turnover Expenditure in PCA (£M)		75.2			75.2	
[2] Benchmark Turnover of Existing Floorspace in PCS (£M)		17.8			17.8	
[3] Surplus Expenditure (£M)		57.4			57.4	
[4] Other Shops in North West Cambridge (£M)		5.0			5.0	
[5] Allowance for small convenience shops (£M)	1.0	1.0	1.0	1.0	1.0	1.0
[6] Turnover of Committed/Pipeline Convenience Floorspace (£M)	3.9	6.0	8.4	7.9	12.1	16.7
[7} Residual Turnover allowing for commitments (£M) [3 - (4 + Total Sum of 5 and 6)]		31.1			12.7	
[A] Turnover of Centres if Residual Expenditure split between Orchard Park and NIAB (£M)	20.5	22.6	9.4	15.3	19.5	17.7
[B] Turnover of Centres if Residual Expenditure split between Orchard Park and NW AAP (University) (£M)	20.5	7.0	25.0	15.3	13.1	24.1
[C] Turnover of Centres if Residual Expenditure split between NIAB and NW AAP (University) (£M)	4.9	22.6	25.0	8.9	19.5	24.1

Appendix 5 – North West Cambridge Convenience Capacity Assessment 2011 'Options'

Cambridge City Council and South Cambridgeshire District Council
North West Cambridge Supplementary Retail Study February 2010

Table 1a: Option 1a - Main foodstore of 2, 500 sqm net in one centre at 2011 at Constant Market Share

Proposed Main Foodstore Allowance (Sales Density of £12,000 per sq m at 2011)	Small Foodstore Committed/Pipeline (Sales Density of £5,000 per sqm at 2011)			Main Foodstore Committed/Pipeline (Sales Density of £10,000 per sqm at 2011)		
	Orchard Park	NIAB	NW AAP (University)	Orchard Park	NIAB	NW AAP (University)
[1] Total Convenience Turnover Expenditure in PCA (£M) @ Constant Market Share	23.4			23.4		
[2] Benchmark Turnover of Existing Floorspace in PCS (£M)	17.3			17.3		
[3] Surplus Expenditure (£M) [1 - 2]	6.2			6.2		
[4] Main Foodstore Allowance (£M) (2,500 sq m net @ £12,000 per sqm)	30.0			30.0		
[5] Turnover of Committed/Pipeline Convenience Floorspace (£M)	3.9	6.0	8.4	7.9	12.1	16.7
[6] Allowance for small convenience shops (£M)	1.0	1.0	1.0	1.0	1.0	1.0
[A] Turnover of Centres if Main Foodstore provided at Orchard Park (£M) [4 or 5 + 6]	31.0	7.0	9.4	31.0	13.1	17.7
[B] Turnover of Centres if Main Foodstore provided at NIAB (£M) [4 or 5 + 6]	4.9	31.0	9.4	8.9	31.0	17.7
[C] Turnover of Centres if Main Foodstore provided at NW AAP (University) (£M) [4 or 5 + 6]	4.9	7.0	31.0	8.9	13.1	31.0
[D] Maximum Residual Turnover (£M) [3 - (Total Sum of A, B or C)]	-41.2	-39.1	-36.7	-55.6	-51.4	-46.8

Table 1b - Option 1b - Main foodstore of 2,500 sqm net in one centre at 2011 at Increased Market Shares

Proposed Main Foodstore Allowance (Sales Density of £12,000 per sq m at 2011)	Small Foodstore Committed/Pipeline (Sales Density of £5,000 per sqm at 2011)			Main Foodstore Committed/Pipeline (Sales Density of £10,000 per sqm at 2011)		
	Orchard Park	NIAB	NW AAP (University)	Orchard Park	NIAB	NW AAP (University)
[1] Total Convenience Turnover Expenditure in PCA (£M) @ Increased Market Share	55.3			55.3		
[2] Benchmark Turnover of Existing Floorspace in PCS (£M)	17.3			17.3		
[3] Surplus Expenditure (£M) [1 - 2]	38.1			38.1		
[4] Main Foodstore Allowance (£M) (2,500 sq m net @ £12,000 per sqm)	30.0			30.0		
[5] Turnover of Committed/Pipeline Convenience Floorspace (£M)	3.9	6.0	8.4	7.9	12.1	16.7
[6] Allowance for small convenience shops (£M)	1.0	1.0	1.0	1.0	1.0	1.0
[A] Turnover of Centres if Main Foodstore provided at Orchard Park (£M) [4 or 5 + 6]	31.0	7.0	9.4	31.0	13.1	17.7
[B] Turnover of Centres if Main Foodstore provided at NIAB (£M) [4 or 5 + 6]	4.9	31.0	9.4	8.9	31.0	17.7
[C] Turnover of Centres if Main Foodstore provided at NW AAP (University) (£M) [4 or 5 + 6]	4.9	7.0	31.0	8.9	13.1	31.0
[D] Maximum Residual Turnover (£M) [3 - (Total Sum of A, B or C)]	-9.3	-7.2	-4.8	-23.7	-19.5	-14.9

Table 1c - Option 1c - Main foodstore of 1,500 sqm net in one centre at 2011 at Increased Market Shares

Proposed Main Foodstore Allowance
(Sales Density of £12,000 per sq m at 2011)

Small Foodstore Committed/Pipeline
(Sales Density of £5,000 per sqm at 2011)

Main Foodstore Committed/Pipeline
(Sales Density of £10,000 per sqm at 2011)

	Small: Orchard Park	Small: NIAB	Small: NW AAP (University)	Main: Orchard Park	Main: NIAB	Main: NW AAP (University)
[1] Total Convenience Turnover Expenditure in PCA (£M) @ Increased Market Share	55.3			55.3		
[2] Benchmark Turnover of Existing Floorspace in PCS (£M)	17.3			17.3		
[3] Surplus Expenditure (£M) [1 - 2]	38.1			38.1		
[4] Main Foodstore Allowance (£M) (1,500 sq m net @ £12,000 per sqm)	18.0			18.0		
[5] Turnover of Committed/Pipeline Convenience Floorspace (£M)	3.9	6.0	8.4	7.9	12.1	16.7
[6] Allowance for small convenience shops (£M)	1.0	1.0	1.0	1.0	1.0	1.0
[A] Turnover of Centres if Main Foodstore provided at Orchard Park (£M) [4 or 5 + 6]	19.0	7.0	9.4	19.0	13.1	17.7
[B] Turnover of Centres if Main Foodstore provided at NIAB (£M) [4 or 5 + 6]	4.9	19.0	9.4	8.9	19.0	17.7
[C] Turnover of Centres if Main Foodstore provided at NW AAP (University) (£M) [4 or 5 + 6]	4.9	7.0	19.0	8.9	13.1	19.0
[D] Maximum Residual Turnover (£M) [3 - (Total Sum of A, B or C)]	2.7	4.8	7.2	-11.7	-7.5	-2.9