

# Greater Cambridge Retail and Leisure Study 2021

Strand 1 – Baseline Evidence

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**urban shape**  
PLANNING CONSULTANTS

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## 1. Introduction

- 1.1 Urban Shape and Hatch are instructed by Cambridge City Council and South Cambridgeshire District Council ('the Council') to undertake a borough-wide Retail and Commercial Leisure Study.
- 1.2 The study will be used as evidence to inform the preparation of the Joint Cambridge and South Cambridgeshire Local Plan and the North East Cambridge (NEC) Area Action Plan. The NEC is a strategic site set to deliver a new housing and employment led community requiring an appropriate level of supporting retail and town centre uses. The study will also remain at the Council's disposal to assist in the determination of planning applications for new development.
- 1.3 The report will provide the Council with an up-to-date and comprehensive understanding of the current health and performance of the retail and leisure offer within the existing network of town centres, to set out current and future needs for additional floorspace to the period 2040, and to introduce recommendations and a robust strategy for existing and new centres.
- 1.4 Our terms of reference are to:
  - Establish the extent to which the current retail and leisure provision satisfies the level and nature of consumer demand within the catchment – both qualitatively and quantitatively;
  - Identify the scale and nature of additional convenience and comparison retail provision that may be appropriate across the study area to the period 2040, taking into consideration changes to housing growth, population and forecast retail expenditure;
  - Assess the scope for new retail and leisure development and the potential to accommodate this sequentially across the Greater Cambridge sub-region;
  - Assess the appropriateness of the existing development plan policy approach for retail and main town centre uses, and provide recommendations to inform emerging policies for the new Local Plan.
- 1.5 In addition to on-site and desk-based research, this report is informed by a new Household Telephone Survey covering 1,100 households across 11 survey zones. Interviewing was undertaken in November 2019, prior to the global Covid-19 pandemic. Zones 1-10 of the new household telephone survey area is entirely consistent with that used to inform the previous Cambridge Retail and Leisure Study Update 2013, enabling direct comparisons to be made and trends identified. An additional new zone – Zone 11 – has been added to collect data relating to the west of the catchment.
- 1.6 A new in-centre shopper survey, engaging 500 visitors to Cambridge historic core and the Grafton Centre, was undertaken during November 2019. Again, this was prior to the Covid-19 pandemic. The interviews were split, with 300 taking place in the historic core and 200 being undertaken in the Grafton Centre.



## Covid-19: Study Timeline

- 1.7 This Retail and Leisure study commenced in September 2019, ensuring the successful collection of survey and on-site audit data in advance of the Covid-19 pandemic and consequent UK 'lockdown' on Monday 23rd March 2020. The fortunate timing ensured the most up-to-date analysis of the health of each town centre as well as travel and expenditure patterns in pre-Covid 'normal' times, i.e. forming the 'baseline position', and 'benchmark' for future monitoring.
- 1.8 The introduction of 'lockdown' measures and social distancing in March 2020 included the closure of all but essential shops and services. This had an immediate impact on high streets, with town centre businesses unable to trade and no timeline in place for re-opening. The longer term impact of Covid-19 on wider society and our high streets remains uncertain, but it is widely accepted that town centres will 'bounce back', but pre-Covid trends and challenges will accelerate the rate of change in respect of operator line-up and composition, and – in many cases – contraction.
- 1.9 The progress of the study through to completion was intentionally slowed by the Council to follow the Local Plan preparation programme, and to allow a considered and informed approach to forecasting over the plan period as a consequence of the Covid-19 pandemic.
- 1.10 These cautious measures have enabled the consideration of new and up-to-date published commentary in respect of economic scenarios, cultural shifts, commercial pressures and opportunities, and the implications for our high streets. The extended timeframe also enabled more local consultation with key stakeholders and shopping centre owners as they prepared for re-opening during the spring/summer of 2021 following a further period of 'lockdown'.

## Report Structure

- 1.11 The report is structured as follows:
  - **Section 2** summarises the national and local planning policies relevant to retail and town centres across the Greater Cambridge sub-region, and discusses recent legislative changes to the planning system.
  - **Section 3** considers the national context in terms of economic and sectoral trends, research commentary and wider town centre planning reform.
  - **Section 4** considers the wider sub-regional context, analysing trends in market share/trade draw across Greater Cambridge since previous evidence based studies.
  - **Section 5** reviews the composition, role and function of Cambridge City Centre, drawing on on-site surveys, published data, and the outputs from the Household Telephone and In-Centre Surveys.
  - **Section 6 and 7** provide high level town centre assessments of the smaller district, local and rural centres across the Greater Cambridge study area.



- **Section 8** provides an in-depth description and commentary on the strategic growth and other key allocated sites across Greater Cambridge, including the level of planned, committed and under construction retail/town centre floorspace.
- **Section 9** sets out the quantitative 'need' for additional convenience and comparison goods retail floorspace to the period 2040.
- **Section 10** provides a Leisure Assessment, considering commercial trends, current provision and the scope for new facilities/venues over the plan period.
- **Section 11** draws the analysis together and sets out our conclusions and recommendations.



## 2. Policy Context and Legislative Change

2.1 In this section we summarise the points of relevance from national and local planning policy, which provide the context and framework for the remainder of this study.

### National Planning Policy Framework (2019)

- 2.2 The most up-to-date National Planning Policy Framework (NPPF) was published on 19 February 2019. The document sets out the Government's presumption in favour of sustainable development, and confirms that the planning system should be genuinely plan-led. Succinct and up-to-date plans are required to provide a positive vision for the future of each area, and the preparation and review of all policies should be underpinned by relevant and up-to-date evidence. Local plans should positively seek opportunities to meet the development needs of their area, and be sufficiently flexible to adapt to rapid change.
- 2.3 Section 7 seeks to ensure the vitality of town centres, emphasising that planning policies and decisions should support the role that town centres play at the heart of local communities; with a positive approach taken to their growth, management and adaptation. Planning policies are encouraged to seek a series of outcomes relating to the long-term vitality and viability of the hierarchy of town centres, the extent of primary shopping areas and the location of sufficient development opportunity sites. The NPPF states that planning policies should also recognise the benefits of residential development and town centre living in ensuring the vitality of centres.
- 2.4 In order to be considered 'sound', Local Plans should be positively prepared, justified, deliverable and consistent with national policy. The NPPF is a material consideration in planning decisions.
- 2.5 In respect of Development Management, paragraph 86 of the NPPF (as revised) states that a sequential assessment is required for planning applications for 'main town centre uses' (which include retail) that are not in an existing centre and are not in accordance with an up to date Local Plan. Proposals for main town centre uses should be located in town centre locations, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. Paragraph 87 adds that when considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre.
- 2.6 Paragraph 89 of the NPPF confirms that when assessing applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan, LPAs should require an impact assessment if the development is over a proportionate, locally set threshold. If there is no locally set floorspace threshold, the default threshold is 2,500 sq m of gross floorspace. Impact assessments are required to assess:
- 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; and



- the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).

2.7 The NPPF directs that where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the considerations in paragraph 89, it should be refused.

### **Planning Practice Guidance (PPG) (2014)**

2.8 In March 2014 the Department for Communities and Local Government (DCLG) launched online Planning Practice Guidance (PPG). It was last updated in September 2020. Although it does not constitute a statement of Government policy, it provides technical guidance on how to prepare a robust evidence base and how to assess the impact of proposals for main town centre uses. The web-based resource also provides guidance on how to assess and plan to meet the needs of main town centre uses in full through production of a positive vision or strategy for town centres.

2.9 The guidance provides additional detail on applying the sequential and impact test, and whilst the NPPF has removed reference to shopping 'frontages', the PPG confirms that authorities may, where appropriate, wish to define primary and secondary retail frontages where their use can be justified in supporting the vitality and viability of particular centres. These frontage allocations would be in addition to Primary Shopping Areas. The PPG confirms that the impact test only applies to proposals exceeding 2,500 square metres gross of floorspace, unless a different locally appropriate threshold is set by the local planning authority.

### **The Development Plan**

#### **Cambridge Local Plan, October 2018**

2.10 The adopted 2018 Local Plan sets out policies and proposals for future development and spatial planning requirements to 2031. The document highlights that Cambridge is a demonstrably successful place, where economic success, high quality of life, sustainable living and quality of space are inextricably linked.

2.11 Paragraph 1.7 notes that the population of Cambridge was 123,900 in 2011, but is predicted to reach 150,000 by 2031. Cambridge must also consider the needs of the large student population from the University of Cambridge and Anglia Ruskin University, and the high volume of visitors and tourists to Cambridge every year (over 4.5 million).

2.12 Paragraph 2.15 quotes the NPPF (2012), recognising that local planning authorities must positively seek opportunities to meet the development needs of their areas. A series of policies set out the 'objectively assessed need' for different land-uses, including:

- Policy 2, Employment: 22,100 new jobs by 2031, including 8,800 in B-use class (offices and industry);



- Policy 3, Housing: Not less than 14,000 additional dwellings between 2011 and 2031 within Cambridge City’s administrative boundary;
- Policy 6, Retail Capacity: Up to 14,141 sq m net of comparison retail floorspace to the period 2022, and no capacity for additional convenience goods floorspace.

2.13 Policy 6 confirms that Cambridge city centre should be the focus for meeting the level of retail need identified, primarily through the redevelopment in the Fitzroy/Burleigh Street/Grafton Primary Shopping Area, and other appropriate redevelopment/infill where opportunities arise in the historic core. The policy adds that exploration of the potential for an extension to the Lion Yard/Grand Arcade in the former Post Office yard behind St Andrew’s Street for retail and mixed-use purposes is encouraged.

2.14 With regard to the impact threshold, Policy 6 states that applications for retail development in out-of-centre locations will need to be supported by an impact assessment where they are above 2,500 sq m gross. The policy adds, however, that where the Council is concerned that a proposal might have a cumulative impact or an impact on the role or health of nearby centres within the catchment of the proposal, an impact assessment may be required for a small proposal. Developers are encouraged to discuss this with the Council at the earliest opportunity during the pre-application stage.

2.15 The hierarchy of town centres in Cambridge is set out in Policy 6, as identified here in Table 2.1.

**Table 2.1: Cambridge City Administrative Area, Hierarchy of Town Centres**

Type of Centre	Designated Centres	Linked Policies
1.City Centre (1)	City Centre boundary and primary shopping area (PSA)	10 and 11
2.District Centres (6)	Arbury Court, Cherry Hinton High Street, Histon Road, Mill Road East, Mill Road West, Mitcham’s Corner.	72
3.Local Centres (8)	Arbury Road/Milton Road, Barnwell Road, Cherry Hinton Road East, Cherry Hinton Road West, Hills Road, Hills Road/Cherry Hinton Road, Newnham Road, Trumpington. New Centres coming forward: Station Area (CB1), NIAB 1 and the University of Cambridge’s North West Cambridge Site.	72
4.Neighbourhood Centres (14)	Adkins Corner, Akeman Street, Campkin Road, Carlton Way, Chesterton High Street, Ditton Lane, Fairfax Road, Grantchester Street (Newnham), Green End Road,	72



Type of Centre	Designated Centres	Linked Policies
	Hawthorn Way, King’s Hedges Road, Norfolk Street, Wulfstan Way, Victoria Road. New Centre coming forward: Clay Farm.	

- 2.16 Paragraph 2.62 recognises that the ‘vibrant, outstanding city centre has low vacancy levels and increasing pressure for new development. The city centre is identified as having a multi-functional role and its contribution will increase as it continues to meet the needs of committed and new population growth in Cambridge and the sub-region.
- 2.17 In addition to the city centre, a network of centres is important as a focus for a range of town centre uses (as defined in the NPPF 2012). The position of a centre in the hierarchy reflects its size and range of services and facilities, and the size of its catchment. New development should be of a type and scale appropriate to the centre. Paragraph 2.65 confirms that the centres in Cambridge are generally performing well and have a low vacancy rate, however their vitality and viability needs to be supported. In particular, the smaller local and neighbourhood centres need to be protected, as they perform an important function in providing for day-to-day needs.
- 2.18 Paragraph 2.66 makes reference to new centres planned in the urban extension in the south and north west of the city, which will – in due course – be considered as part of the hierarchy.
- 2.19 The high-level approach set out in the vision and strategy for Cambridge is complemented by policies and proposals that promote and manage change in key areas of the city and on specific sites. These are addressed in the Local Plan (Chapter 3) under five key headings including Cambridge City Centre, sites covered by existing Area Action Plans (AAP’s), Areas of Major Change (AOMC), Opportunity Areas, and site specific proposals.
- 2.20 Policy 10, the City Centre, confirms that Cambridge city centre will be the primary focus for developments attracting a larger number of people and for meeting needs appropriate to its role as a multi-functional regional centre.
- 2.21 Policy 11 provides more detail about the Primary Shopping Area, emphasising that Use Class A1 will be supported whilst alternative town centre uses and proposed change of use will be considered subject to a list of criteria. Use Class A1 should not fall below 70% in the Primary Shopping Frontage, whilst in the Secondary Shopping Frontage the level should not fall below 50% and should remain the predominant use. A mix of small and larger units are encouraged, and the merging of units in secondary frontages is resisted to protect the demands of smaller independents and local traders.
- 2.22 The Fitzroy/Burleigh Street/Grafton Area of Major Change (AOMC) is the primary focus for providing additional comparison retail in the city centre, along with other mixed uses (Policy 12). This area is supported as a location for expansion and/or



redevelopment for retail and leisure use (A1, A2, A3, A4 and D2), with residential and student accommodation on upper floors. Policy 12 quotes the evidence base which suggests that up to 12,000 sq m of new comparison retail floorspace could be provided in the area. A separate Masterplan for the ‘Grafton Area’ has been prepared by Cambridge City Council (2018), as supplementary planning guidance. We discuss the Masterplan later in this section.

2.23 Cambridge has two adopted Area Action Plans (discussed in more detail later in this section), prepared jointly with South Cambridgeshire District Council:

- the University of Cambridge’s North West Cambridge site covered by the North West Cambridge Area Action Plan (NWCAAP) (2009), and
- the Cambridge East Area Action Plan (CEAAP) (2008).

2.24 Both AAP’s remain part of the development plan as separate documents, albeit in respect of Cambridge East, policies CE/3 (defining the site) and CE/35 (phasing of development adjacent to the airport) of the CEAAP have been replaced by Policy 13 of the 2018 Local Plan. The new urban quarter at Cambridge East was dependent on the relocation of current activities at the airport, which has not yet been resolved or confirmed as certain. Careful consideration has subsequently been given to an appropriate way forward, with Policy 13 of the Local Plan providing clarification on land uses, the phasing of development and mitigation of environmental and health impacts of the proposed new community.

2.25 Policies 14-26 detail Areas of Major Change and Opportunity Areas, several of which were well advanced at the time of the 2018 adoption of the Local Plan. Policy 14 is not site specific and sets out general principles for development across the Areas of Major Change and Opportunity Areas. The site specific policies, which are summarised in Table 2.2 below, set the broad framework for development and specify the principal land uses, accessibility considerations and landscape requirements for each area.

**Table 2.2: Areas of Major Change and Opportunity Areas**

<b>Policy</b>	<b>Area of Major Change</b>	<b>Principal Land Uses</b>
12	Fitzroy/Burleigh Street/Grafton [no site specific proposal sites]	Retail and Leisure (Use Class A1/2/3/4 and D2), with residential and student accommodation on upper floors. Up to 12,000 sq m of additional comparison goods floorspace could be accommodated.
15	Cambridge Northern Fringe East & New Railway Station [no site specific proposal sites]	Primarily employment uses with supporting retail, leisure and residential. [Now subject of Draft Area Action Plan 2020, discussed later in this section]. Joint strategic site with South Cambridgeshire District Council.
16	South of Coldham’s Lane [no site specific proposal sites]	Urban Country Park



<b>Policy</b>	<b>Area of Major Change</b>	<b>Principal Land Uses</b>
17	Cambridge Bio-Medical Campus (including Addenbrooke's Hospital) [including site allocation M15]	Local, regional or national health care needs/education, biomedical and biotechnology research and development, with associated support activities including hotel, conference centre, small local shop (A1), A3 Café, A4 public house and D1 creche.
18	Southern Fringe (Clay Farm, Trumpington Meadows, Bell School and Glebe Farm) [including site allocation R42a, R42b, R42c, R42d]	Well integrated, accessible and sustainable new neighbourhoods. Residential, with complementary community facilities, secondary and primary school, local shops and open space/play areas. R42a – 2,250 dwellings; R42b – 598 dwellings; R42c – 286 dwellings; R42d – 347 dwellings / 100 student beds.
19	West Cambridge [site allocation M13]	Uses related to the University of Cambridge; D1 Education, academic research institutes, B1(b) commercial research and development, small-scale community facilities, A1 local shop, A3 café, A4 public house, D1 creche and student accommodation.
20	Land between Huntingdon Road and Histon Road (NIAB 1) [site allocation R43]	New neighbourhood, mix of residential with complementary primary school, new local centre, foodstore (up to 2,000 sq m), community facilities, open space, allotments and facilities for children and teenagers.
21	Station Areas West and Clifton Road [site allocations M2, M14 and M44]	Vibrant mixed-use areas. Residential, B1 employments, Use Class A retail, community uses, hotel and open spaces.



Policy	Opportunity Areas	Approach
22	Mitcham's Corner	Sustainable transport modes/pedestrian cycling rather than vehicle, place-making, delivery of local shops and services, reinforcing the high street feel.
23	Eastern Gate	Remodelling of large-scale highway interventions and unsympathetic bulky buildings. Vision to reconnect people and places, and to encourage mix of uses including residential on upper floors.
24	Mill Road	To strengthen the distinctiveness of Mill Road including the two District Centres through design, place-making and public realm. No amalgamation of units. Encouragement of unit and frontage improvements.
25	Cambridge Railway Station, Hills Road Corridor to the Cen	Creation of an improved, high quality link connecting the city centre to the station (including consented CB1 scheme); prioritising walking and cycling and creating a better sense of place.
26	Old Press/Mill Lane	The relocation of existing University activities within this part of the historic core to more appropriate buildings, enabling the opportunity to create lively, attractive area adjoining the river. Enhancement of heritage setting, and reuse/redevelop buildings.

2.26 Policy 64 recognises that shop front design is important to the success of Cambridge as a regional shopping centre and to maintain its thriving district and local centres. The shop frontage policy encourages the retention of historic shopfronts and features of architectural and historic interest, ensures respect for scale, proportions, character and materials, and promotes materials appropriate to the age and character of the building.

2.27 Policy 72 provides further clarification in respect of district, local and neighbourhood centres. Specifically, the policy protects A1 shop uses, and provides robust criteria with which to assess the change of use from A1. In district centres, the number of properties should not fall below 55% and the loss of ground floor to non-centre uses (B1/B2/B8/C2/C3/C4/Sui Generis) will not be permitted. Residential, student accommodation, offices and community facilities are supported on upper floors, and in district centres, small units should not be amalgamated to make a larger units.



### South Cambridgeshire Local Plan (2018)

- 2.28 South Cambridgeshire is located centrally in the East of England region at the junction of the M11/A14 roads and with direct rail access to London and to Stansted Airport. It is a largely rural district which surrounds the city of Cambridge, comprising over 100 villages, a growing population and new clusters of high technology research and development as part of the Cambridge Sub-Region.
- 2.29 Paragraph 2.11 explains that the Cambridge Sub Region SHMA 2012 identifies the objectively assessed need for housing in South Cambridgeshire and all other districts in the Cambridge Sub Region housing market area for the period 2011-2031. The outputs, informed by additional technical evidence, identify a need for 22,000 additional jobs and 19,500 new homes in South Cambridgeshire (Policy S/5).
- 2.30 Paragraph 8.73 addresses the objectively assessed need for retail, referencing the Cambridge Sub-Regional Retail Study 2008 commissioned jointly by Cambridge City Council and South Cambridgeshire District Council. The evidence base identified comparison and convenience goods floorspace, and concluded that – in South Cambridgeshire – this should be directed to planned major developments such as Northstowe.
- 2.31 The new towns of Northstowe and Waterbeach will be considered as town centres in the hierarchy. Paragraph 8.69 confirms that there will be a need for convenience and comparison floor area provision of a scale necessary to ensure that the settlements are sustainable. However, the Council does not intend that either new town should perform a sub-regional role that has a significant impact on the role of Cambridge. Further guidance on proposals for convenience and comparison retail in Northstowe is contained in the Northstowe Area Action Plan (discussed later in this section).
- 2.32 Policy S/6 summarises the development strategy for South Cambridgeshire to 2031. The policy notes that major site allocations from the South Cambridgeshire Local Development Framework 2007-2010 together with the Area Action Plans for Northstowe (except as amended by SS/5), North West Cambridge, Cambridge Southern Fringe and Cambridge East (except as amended by Policy SS/3) are carried forward as part of the development plan to 2031 or until such time as the developments are complete.
- 2.33 Three new strategic scale allocations are proposed for housing-led development with associated employment and supporting services and facilities to meet the majority of the additional development needs to 2031 and beyond (Policy S/6):
- A new town north of Waterbeach for 8,000 to 9,000 homes;
  - A new village based on Bourn Airfield for 3,500 homes;
  - A major expansion of Cambourne for a fourth linked village of 1,200 homes.
- 2.34 Paragraph 2.47 explains that the preference to allocate all three strategic sites was influenced by the long lead in times for new settlements which will come forward later in the plan period and continue developing beyond 2031. The major



expansion at Cambourne will prevent significant and unsustainable house building across the village settlements, which will instead accommodate c.900 new homes to help ensure a continuous supply over the plan period.

2.35 Chapter 3 of the adopted Local Plan provides more detail of the existing and new strategic sites as allocated on the adopted proposals map.

**Table 2.3: Strategic Sites on the Edge of Cambridge**

<b>Policy</b>	<b>Site</b>	<b>Principal Land Uses</b>
SS/1	Orchard Park/Cambridge Northern Fringe (West).	Sustainable housing-led mixed-use development providing a minimum of 900 dwellings, a public transport interchange on the Guided Busway along the former railway line, up to 18,000 sq m B1 Business development, a primary school, a local centre, public open space.
SS/2	Land between Huntingdon Road and Histon Road (North West Cambridge) (Darwin Green 2 / NIAB 2)	Adjoins Cambridge City Local Plan site allocation R43 (NIAB 1) and Area of Major Change. Land uses will span both sites in Cambridge and South Cambridgeshire.  1,000 new homes, primary and secondary school, local shopping and community facilities. Some provision has already been planned within the local centre of the adjoining development in Cambridge (R43) including a health centre and foodstore.
SS/3	Cambridge East	Joint strategic site with Cambridge City authority.  Subject of Cambridge East Area Action Plan (2008) (see below).  New urban quarter, 10-12,000 new dwellings, one large district centre, a series of local centres, and primary and secondary school.
SS/4	Cambridge Northern Fringe East	Joint strategic site with Cambridge City authority.  Primarily employment uses with supporting retail, leisure and residential.
NW/4	North West Cambridge	Joint Strategic site with Cambridge City authority.  Subject of Cambridge North West Area Action Plan (2009) (see below).



**Table 2.4: New Settlement Strategic Sites, South Cambridgeshire**

<b>Policy</b>	<b>Site</b>	<b>Principal Land Uses</b>
SS/5	Northstowe Extension	<p>Subject of Northstowe Area Action Plan (2007) (see below).</p> <p>Allocated as an extension to the site of the new town of Northstowe. 10,000 new homes. Policy SS/5 supersedes Policy NS/3 of the Northstowe AAP.</p>
SS/6	Waterbeach New Town	<p>8,000-9,000 new homes on former Waterbeach Barracks, employment, shops, services, leisure and other town centre uses (as defined by NPPF) of an appropriate scale for a town whilst avoiding significant impacts on vitality and viability of surrounding centres, and not competing with Cambridge as the sub-regional centre.</p> <p>A long term development opportunity, taking place over the plan period and beyond.</p> <p>Reference to preparation of a Supplementary Planning Document (SPD).</p>
SS/7	New Village at Bourn Airfield	<p>c.3,500 new homes and all necessary community facilities and services, reference to two primary schools and one secondary school.</p> <p>A long term development opportunity, taking place over the plan period and beyond.</p> <p>Reference to preparation of a Supplementary Planning Document (SPD).</p>

**Table 2.5: Sustainable Village Strategic Sites, South Cambridgeshire**

<b>Policy</b>	<b>Site</b>	<b>Principal Land Uses</b>
SS/8	Cambourne West	<p>A sustainable fourth linked village to Cambourne of approximately 1,200 dwellings by 2031. Could also include nursing and residential care homes. Employment (predominantly Class B1), small scale shops and other town centre uses to serve the needs of the village and adjoining Business Park. Foodstore up to 500 sq m (gross) within a 600 metre walk of the great majority of homes.</p>



2.36 Policy E/21 addresses the retail hierarchy across South Cambridgeshire as follows:

- Northstowe and Waterbeach (new towns) town centres;
- Rural Centres' village centres;
- Other village centres (Minor Rural Centres, Group Villages and Infill Villages).

2.37 Policy E/22 enforces a local retail impact threshold of 500 sq m gross in Rural Centre village centres, and 250 sq m gross outside such centres. This is substantially lower than the NPPF national threshold of 2,500 sq m gross given the rural nature of the district (para.8.72).

#### Cambridge East Area Action Plan (2008)

2.38 The Cambridge East Area Action Plan (CEAAP) was prepared jointly between Cambridge City Council and South Cambridgeshire District Council and was adopted in 2008. The CEAAP sets out the vision and development principles for a new urban quarter on the site of Marshalls Airport – subject to the relocation of airport activities. Policy CE/2 confirms 10-12,000 new dwellings with appropriate employment, services, facilities and infrastructure.

2.39 Policy CE/5 confirms that a large district centre will provide a vibrant focus to Cambridge East, making provision for uses including shops, services, cultural, leisure and community facilities. The intention is to serve the needs of Cambridge East and the immediately surrounding area without undermining the vitality and viability of Cambridge city centre.

2.40 A series of local centres are planned in Policy CE/6, ensuring a community focus for neighbourhoods. They are to be located on a dedicated local busway through the urban quarter, will provide a primary school and convenience shopping, and small scale local employment (B1a and B1b). A secondary school is also planned as part of a larger scale local centre. Policy CE/6 confirms that a local centre will be provided as an early part of the development of Phase 1 north of Newmarket Road.

2.41 In April 2010, Marshalls announced that it would not be relocating from Cambridge airport in the immediate future, and the Council had to reconsider what this meant for the future direction of development as well as how the allocation should be dealt with. Clarification is provided in adopted Local Plan Policy 13 (replacing CEAAP CE/3 and CE/35), which sets out criteria for development, land use locations and accessibility.

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

2.42 The Cambridge North West Area Action Plan (NWAAP) was prepared jointly between Cambridge City Council and South Cambridgeshire District Council and was formally adopted in 2009. The NWAAP relates to an area of land between Madingley Road and Huntingdon Road which will become a new University Quarter.



- 2.43 The proposals include the creation of a new local centre to provide facilities and services for nearby communities. Policy NW21 relates to the provision of the new local centre, and supports the delivery of a single centre at the heart of the development, which is easily accessible. The policy outlines suitable uses in the local centre, including a primary school, appropriate levels of local shopping and other services, a library, community rooms, provision for emergency services, a play area, recycling and health care provision.
- 2.44 On 8th August 2012, planning permission was granted for the mixed-use development of the University site to provide a new University Quarter and residential community. The planning permission included a new local centre anchored by a 2,000 sq m net supermarket.

#### DRAFT North East Cambridge (NEC) Area Action Plan (2020)

- 2.45 The Draft NEC AAP was prepared jointly between Cambridge City Council and South Cambridgeshire District Council. The vision for North East Cambridge is an inclusive, walkable, low-carbon new city district with a lively mix of homes, workplaces, services and social spaces, fully integrated with surrounding neighbourhoods. The development framework for the area is committed to ensuring the ability to walk and cycle across North East Cambridge easily and safely, from the villages to the city centre. The whole of the Area Action Plan area is within a 10 minute cycle ride or a 30 minute walk from Cambridge North station.
- 2.46 Four new town centres are planned within North East Cambridge to create active, lively focal points for new and existing residents and workers. The intention is for these to include shops, places to eat and drink, and community facilities. Two centres will be located at the edge of the Area Action Plan area, where they will help to serve and integrate new and existing communities around Cambridge North Station, and on the edge of the Cambridge Science Park near Cambridge Regional College. Another local centre will be created near St John's Innovation Park, and the larger district centre – with shops and restaurants, community and cultural facilities – will be located centrally to the main area of new development.
- 2.47 North East Cambridge will provide a balanced range of shops and services such as cafés, restaurants, and leisure activities to meet the daily needs of local residents, employees and visitors. The intention is not to create a 'destination' location for people living further afield which would increase car trips into the area. The policy sets out how much retail should be provided, its location, and design criteria to make sure that everyone has easy access by walking and cycling to the shops and services they need. Identified floorspace figures are driven by an in-depth analysis of population growth (residents, employees and visitors).

#### Northstowe Area Action Plan (2007)

- 2.48 The Area Action Plan for Northstowe identifies the site for a sustainable new town with a target size of 10,000 dwellings and associated development. Policy D1 sets out the policy framework for the town centre with a number of objectives, including to provide a vibrant and diverse town centre in the heart of Northstowe, to provide shops, services, cultural, leisure and community facilities to serve the needs of Northstowe and the immediately surrounding area, and to provide a large number



and range of convenience and comparison shops. Policy D1/i encourages the early start to the development of the town centre to help create an identity for Northstowe at the earliest opportunity.

- 2.49 Policy D2 sets out the requirement for Northstowe to provide a series of local centres located appropriately to the dedicated local busway through the town. The policy aims to ensure that all residents of Northstowe are within reasonable walking distance of a local centre or the town centre, and that local centres provide for the day-to-day needs of local residents for convenience shopping and service provision. A new primary and secondary school will be located in/adjoining the new local centres.

#### Cambridge Southern Fringe Area Action Plan (2008)

- 2.50 A sustainable new urban extension to Cambridge is proposed at the Cambridge Southern Fringe, crossing the South Cambridgeshire / Cambridge City boundary. Table 2.2 (above) sets out the area of the Southern Fringe that lies in Cambridge City authority, including Clay Farm, Trumpington Meadows, Bell School and Glebe Farm, and encourages land uses including residential with complementary community facilities including schools, local shops and open space/play area.
- 2.51 The southern fringe area in South Cambridgeshire comprises Trumpington West and land South of Addenbrookes. Policy CSF/1 sets out the vision for the southern fringe, stating that it will be a modern, high quality, vibrant, innovative and distinctive urban extension of Trumpington, which will complement and enhance the character of the city. Policy CSF/2 adds that Trumpington West will comprise approximately 600 dwellings in South Cambridgeshire, with locally available community facilities to meet day to day needs either on site or elsewhere in the Cambridge Southern Fringe – within or outside the District).
- 2.52 Policy 18 of the Cambridge Local Plan (2018) states the local shops and services will be provided throughout the fringe area, but of a scale that would not impact on the vitality and viability of the existing Trumpington Local Centre. Policy CSF/8 confirms that development Trumpington West will include provision for small-scale B1 employment development, the location of which (the City or South Cambridgeshire) will be determined through detailed master-planning. Policy CSF/9 seeks to enable the early establishment of a successful new community at Trumpington, establishing community ownership and community space.
- 2.53 Aside from residential development on the administration boundary, large swathes of Trumpington West will comprise a country park, green belt and landscaped site edging. The entire area south of Addenbrooke's is the focus of countryside enhancement strategies and new cycle and footpaths.

#### Grafton Area Masterplan, Supplementary Planning Document (SPD), December 2018

- 2.54 The Fitzroy, Burleigh Street and Grafton Area is identified in the Cambridge Local Plan as an 'area of major change' (Policy 12). The SPD was prepared to help define and add detail about the potential land uses, design and scale of development appropriate for the area. SPD's are non-statutory and do not form



part of the development plan, but they are material considerations in determining planning applications and do provide more detail to guide development.

- 2.55 This 'area' falls with the city centre 'town centre boundary' alongside the historic core. Section 3.2 sets out the objectives for the Grafton area, including the creation of a positive and attractive environment to support the vitality and viability of the area for retail and associated activity. Paragraph 3.2.6 confirms that a key objective is to improve the existing performance of the area as a retail destination and to accommodate growth in floorspace as set out through the strategic policy position in the Local Plan.
- 2.56 The SPD encourages the strengthening of the area for retail, and greater diversification as a destination for the city – for residents, visitors, workers and students. Integral to this, is the introduction of a broad mix of town centre uses including retail, food and drink, and leisure. The Masterplan envisages that proposals will bring life to the centre through the introduction of new homes, student accommodation, hotel space, university accommodation and offices.
- 2.57 Section 4.3 provides guidance in respect of the scale of different land uses. Informed by the evidence in the 'Cambridge Retail and Leisure Study Update' 2013, Policy 12 of the Local Plan (2018) outlines the role that the Grafton Area will play as a primary focus for providing additional comparison retail in the city centre, along with other mixed uses. Policy 12 allows for the expansion/redevelopment of retail and leisure uses with potential residential and student accommodation on the upper floors.
- 2.58 The 2013 Retail and Leisure Study Update identified a need for 14,141 sq m net of comparison goods floorspace to the period 2022, with Cambridge City Centre identified as being the focus of meeting most of this need. The Grafton Area – to include Fitzroy and Burleigh Street – was identified as the first priority in sequential terms. This was subsequently endorsed in the Local Plan, with Policy 12 stating that the Grafton Area will be the primary focus for providing new comparison retail in the city centre, confirming that up to 12,000 sq m could be provided in the area.
- 2.59 Irrespective of economic fluctuations, it remains the case that the Grafton Area has physical capacity to accommodate this level of retail floorspace and is sequentially a priority location within the adopted development plan.

### **Legislative Change: Use Classes Order**

- 2.60 In October 2018, Government published a consultation into a series of proposed planning reforms designed to speed up and simplify the planning system; the focus of which was on supporting the high street and increasing the delivery of new homes. The consultation recognised the changing and evolving nature of high streets and town centres across the country, and invited responses on a variety of development management methods which Councils could use to promote greater flexibility.
- 2.61 Part 1 of the consultation included proposals in respect of new and amended Permitted Development (PD) rights and changes to use classes, including to support the regeneration of the high street and to extend existing buildings upwards to create new homes. Government proposed new PD rights to allow



existing premises in typical high street uses to change to a wider range of uses, allowing more leisure and community uses such as gyms, libraries, health care and office use as well as homes.

2.62 With the rise of internet shopping, and the change in how people use the high street, the consultation highlighted that it was timely to consider how the operation of the Use Classes Order can support greater flexibility. It noted the need to support the modernisation of the high street and enable businesses to adapt to changes in consumer demands.

2.63 Government published their response to the consultation in May 2019, which confirmed the intention to move away from a suggested single use class which would merge A1, A2 and A3. The government response paper stated that 'more than half of the 276 responses agreed that changes to the A use classes would support the high street [and] there was considerable support to simplify the A1 use class to accommodate new and emerging retail models'. There was, however, concern that:

"...merging the A1, A2 and A3 use classes would enable change to restaurant use without any local consideration of the potential impacts from longer opening hours and increased noise and odours. It could lead to a proliferation and increased concentration of restaurants, including fast food restaurants, in an area with an impact on the health of local residents and local amenity. There was also a concern that it would limit the ability of local communities to shape their high streets as set out in local or neighbourhood plans."

2.64 Rather than the far-reaching amendments proposed as part of the consultation paper, and in response to the consultation, the Government announced that it would only amend the A1 (shops) use class to ensure it captured current and future retail models and include clarification on the ability of (A) use classes to diversify and incorporate ancillary uses.

2.65 Shortly afterwards however, as a consequence of the Covid-19 pandemic, the Government decided to go further and introduce more wide-reaching reforms to the Use Classes – without further public consultation. This was a specific and swift response to the economic impact of Coronavirus on high streets and those premises in A1 and A3 in particular. In force from 1st September 2020, new planning regulations revoked parts A and D of the existing use classes order and introduced a new 'commercial, business and service' Use Class E. In relation to retail and main town centre uses, the changes are as follows:

- New Class E includes:
  - Shops (former A1)
  - Sale of food and drink consumption on premises, 'cafes and restaurants' (former A3)
  - Indoor sport, recreation, fitness (gyms) (former D2)
  - Provision of medical or health services (former D1)



- Creche, day nursery or day centre (former D1)
- Offices, research and development, light industrial (former B1 a, b and c)
- Former A4 (drinking establishments, public houses/wine bars) and A5 (hot food takeaway) uses to become defined as Sui Generis.
- Former D2 cinemas, concert halls/live music venues, bingo halls and dance halls to become defined as Sui Generis.

2.66 Of relevance to Greater Cambridge, and in particular the more rural areas, a series of more protected community uses have been moved into a new Class F, including Class F2(a), 'shops'. The Explanatory Memorandum to the regulations explains:

“The [F] class also recognises the importance of small, local shops in meeting the day to day shopping needs of local communities, particularly in rural communities, large residential estates and outside main shopping areas generally. Therefore, alongside community social facilities, the F2 class includes what would be considered shops servicing the essential needs of local communities. This is defined as a shop mostly for the sale of a range of essential dry goods and food to visiting member of the public where there is no commercial class retail unit within 1,000 metres and the shop area is no larger than 280m<sup>2</sup>. This provides some protection for such shops while placing those shops found on high streets and town centres in the new 'commercial' class.

### **Legislative Change: Permitted Development**

2.67 Following consultation in December 2020, the Government confirmed on 31 March 2021 that a new permitted development (PD) right to allow the change of use from any use, or mix of uses, from the Commercial, Business and Service use class (Class E) to residential use (Class C3) will be introduced under Class MA of the Town and Country Planning (General Permitted Development etc.) (England) Order 2021.

2.68 The government considers that the announced package of measures will help support the creation of much-needed homes while also giving high streets a new lease of life, enabling them to adapt and thrive – ‘transforming unused buildings and making the most of brownfield land’.

2.69 The new PD rights, which take effect on 1 August 2021, will allow unused commercial buildings – or parts of buildings – to be granted permission for residential use via a fast track prior approval process. Councils will only be able to assess prior approval applications on a narrow range of specific considerations including: flooding, noise from commercial premises, adequate light to habitable rooms and impact on a conservation area, for example. The PD rights include:



- a vacancy requirement that will ensure the building changing use has been vacant for a continuous period of 3 months before the date of the application to protect successful businesses in existing use.
- the building must have been in a commercial, business, or service use for at least two continuous years previously.
- a size limit of 1,500 square metres of floorspace applies, to avoid the loss of larger units. The permitted development right does not apply if more 1,500sqm of cumulative floorspace is to be converted. This is significantly more than the 150sqm permitted under Class M retail to residential at present, but a significant new restriction for office to residential change of use via permitted development.

## Summary

- The NPPF advocates a 'town centres first' approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. The NPPF encourages LPA's to recognise that town centres are the heart of their communities and to pursue policies which protect their health and vitality.
- The Cambridge Local Plan confirms that Cambridge City should be the focus for meeting retail need across the Greater Cambridge sub-region, primarily through the redevelopment of the Fitzroy/Burleigh/Grafton Area; but adds that there is also potential for an extension to the Lion Yard/Grand Arcade for retail and mixed-use purposes.
- Policy 6 of the Cambridge City Local Plan recognises the importance of smaller local and neighbourhood centres, performing important functions in providing for day-to-day needs. Policy confirms that these destinations must be protected. Detailed frontage policies set out in Policy 11 are now out of date in the context of planning reform, and we return to this in the final section, setting out our recommendations for the new Local Plan.
- Aside from the Grafton and Station Areas in Cambridge City, most major strategic development/opportunity sites are located on the joint authority shared boundary.
  - Four Area Action Plans set out the parameters for major new settlements at the Southern Fringe, North West Cambridge, North East Cambridge and Cambridge East. The AAP's reinforce the important role of retail and leisure services to meet local day-to-day needs, but add that the intention is not to create town centre 'destinations', and not to undermine the vitality and viability of Cambridge City Centre.
  - A further major strategic site is located on the administrative boundary to the north west of Cambridge city, on land between Huntingdon Road and Histon Road.
- Within Cambridge City Council, an Area of Major Change in and around the train station has been underway and largely complete, include small scale retail and leisure/food and beverage uses at ground floor. Towards the outer



western boundary, 'West Cambridge' is identified as a Major Area of Change but for uses related to the University, and in terms of retail/leisure, includes only a small local shop and café.

- In South Cambridgeshire District Council, the Local Plan allocates major new strategic settlements at Northstowe and Waterbeach, a new village at Bourne Airfield and a major expansion of Cambourne. Adjoining the boundary with Cambridge City, a strategic site is allocated at Orchard Park for a sustainable housing-led mixed-use development, to include a small local centre.
- In force from 1st September 2020, new planning regulations revoked parts A and D of the existing use classes order and introduced a new 'commercial, business and service' Use Class E, incorporating former A1, A2 and A3 retail uses. Former A4 (drinking establishments, public houses/wine bars) and A5 (hot food takeaway) uses and D2 cinemas, concert halls/live music venues, bingo halls and dance halls are now defined as Sui Generis. Isolated rural shops are protected under new Use Class F2(a).
- A new permitted development (PD) right to allow the change of use from any use, or mix of uses, from the Commercial, Business and Service use class (Class E) to residential use (Class C3) will take effect on 1 August 2021. This applies to 'unused' buildings that have been vacant for 3 months, are no larger than 1,500 sq m, and were previously used for at least 2 years for commercial, business or service use.



### 3. National Context

- 3.1 Consumer and economic trends in the retail and leisure sector have important implications on the formulation of planning and spatial strategies and the future vitality and viability of each individual town centre across the UK. We provide a detailed insight in this section, drawing out the key points of relevance for town centre planning across Greater Cambridge.
- 3.2 Trends in recent years have been well documented. They closely follow global economic fluctuations, growth in on-line shopping/multi-channel retailing; changes in the property and space requirements of retail operators; evolution towards multi-dimensional town centres; the growth of the commercial leisure sector; and changes in the convenience goods sector with the growth of discount retailers and more varied food shopping habits. Sectoral analysis and published evidence confirm that town centres will need to continue to evolve and adapt to remain vital and viable locations.
- 3.3 As highlighted in the introduction, this study commenced in September 2019 and was undertaken during the Covid-19 pandemic. In March 2020, lockdown shut our high streets overnight, with no timeline in place for re-opening. The longer term impact of Covid-19 on wider society and our town centres is still uncertain, but it is widely accepted that town and city centres will bounce back to varying degrees, and that Covid-19 has accelerated trends and challenges facing our high streets.

#### The Evolving Role of the Town Centre

- 3.4 Retail will continue to be an important footfall driver in town centres, and whilst high streets are evolving, the role of retail and retail operators should continue to be central to any town centre strategy moving forwards. Nevertheless, trends and the need to inject life into our high streets have introduced new, multi-dimensional elements to town centres which should be promoted and incorporated alongside retail into emerging town centre strategies. These can be summarised as follows:
  - The development of an **'experience'** for visitors who are increasingly seeking to combine retail and leisure activities as part of a single 'going out' trip. Town centres must provide an attractive experience for visitors which the internet is unable to match. This might include specialist markets, independent cinemas, street food and seasonal events, for example.
  - Town centres acting as genuine **hubs for their communities**, and the need to create a vibrant social, commercial and cultural destination. Uses might include cultural space, co-working space, space for small and medium-sized enterprises (SME's), community facilities including libraries, education space, community halls/meeting venues, and health centres.
  - Larger scale **'destination' uses** including conference centres, hotels, offices, cultural and performance venues.
  - Growth in **town centre living** and residential space/student accommodation – delivering footfall in the evenings and at weekends as well as during the daytime. A town centre strategy will require consideration of noise,



environmental health and licensing hours in order to consider residential amenity alongside a supported evening economy.

- 3.5 Uncertainty around the future of our town centres and observations around how they are evolving has been taking place for some years. In December 2018, the Government published 'The High Street Report', setting out the findings of the 'High Streets Expert Panel' which was established earlier in 2018. The Panel, Chaired by Sir John Timpson, sought to identify the key issues facing high streets and town centres, and advise on the best practical measures which the Government can take to help. In introducing the report, Sir John stated:
- “Town centres are evolving, and retail will not return to the high streets that existed 10 or 20 years ago. A combination of internet shopping, the convenience of out of town retailing and an exceptional number of well-established retail formats reaching the end of their commercial life, has led to a marked increase in empty shops and a decline in footfall. In completing this report, I have more hope for the future of our town centres than when we first started gathering evidence.”
- 3.6 He added that throughout their report, they use the term 'town centre' rather than 'high street' because their recommendations are not just about shops and shopping. The town centre of the future should attract local people to take part in a variety of activities – including dining, leisure and sport, culture and the arts, entertainment, medical services, and many more uses. They should also contain business premises, offices, and residential including affordable housing.
- 3.7 Instructed by 'Key Cities Group', consultants 'Infusion' were asked to 'review the current state of play across our town and city centres'. The 2019 report starts by highlighting that over the course of the last decade, the British High Street has faced some of its biggest challenges in history. From a major economic downturn, through new retail methods and in conjunction with already-ongoing shifts in consumer spending and visiting patterns, some of the country's most recognisable names have disappeared from our city centres. Many more major retailers face huge difficulties and are undertaking seismic shifts in order to maintain their viability.
- 3.8 The report presents a strong position statement – 'with the retail sector undergoing such major change, there is a very real threat to the existing model underpinning the vibrancy and sustainability of our city centres'. It emphasises that the retail sector has historically anchored much of our central area floor space, particularly at the visible and impactful ground floor level, and generated the bulk of footfall. With the convenience of newer methods of shopping likely to outweigh the convenience of central area shopping for the foreseeable future, it concludes that city centres can no longer rely on retail to be relevant.
- 3.9 The report states that central areas need to be diverse in the way their space is used to maintain their vibrancy, and activity in centres cannot be confined to daytimes. Ideally, city centres should not only be locations people shop in, but also eat in, drink in, work in and live in. The role of retail is still relevant and



important, but the report concludes that ‘as well as town centres being a focal point for retail, they need to become areas in which people live, work and spend their leisure time’.

### Economic Trends

- 3.10 Since the 2008 and 2013 Retail Studies were published, the UK’s 2016 decision to leave the European Union has become an influencing factor in forecasts of economic growth. The UK economy slowed during 2019, sliding to a 7 year low by the end of the year, household spending growth slowed to an 8 year low of 1.2% in 2019, income growth was disappointing, and retail sales volumes grew by 3% - the weakest reading since 2014. The Experian ‘Retail Planner Briefing Note 17 (February 2020) attributed this to the period being dominated by heightened Brexit uncertainty and a weaker global economy.
- 3.11 Experian note that the outcome of the December 2019 general election removed near-term political uncertainty and the risk of a no deal Brexit, empowering the government to push forward with spending pledges and EU withdrawal plans. In February 2020, Experian recorded that the latest indicators pointed to a pick-up in business confidence and investment intentions; whilst housing market surveys suggested activity was rebounding and consumer sentiment improving.
- 3.12 Nevertheless, and even before factoring in Covid-19, Experian forecast that GDP growth was set to remain on a slower growth trajectory of 1-1.5% over 2020 and 2021, well below the performance of earlier years. This is reflected in Section 9 when forecasting need for future retail floorspace for Greater Cambridge, with outputs clearly demonstrating the direct consequent impacts on forecast expenditure growth rates for both convenience and comparison goods.

### Covid-19

- 3.13 On Monday 23rd March 2020 the country introduced ‘lockdown’ measures and social distancing including the closure of all but essential shops and services. This had an immediate impact on town centres and town centre businesses unable to trade, with doors shut and no timeline in place for re-opening. In the Retail Planner Briefing Note 18, October 2020, Experian state:

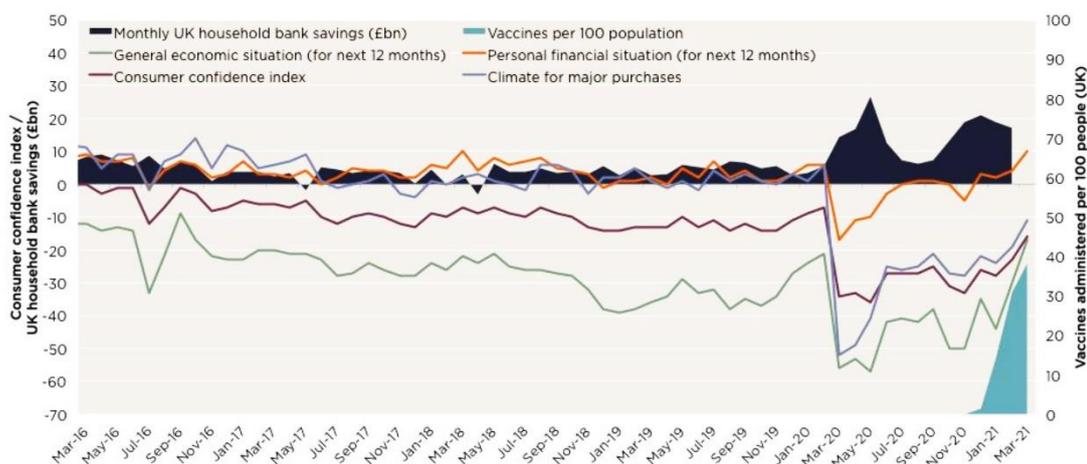
“the outbreak of coronavirus (Covid-19) and measures to contain it has had a considerable impact on the UK and global economies. During the intensive stage of the lockdown, the economy suffered an unprecedented contraction, employment fell markedly and over 9 million employees were furloughed. Consumer demand suffered given social distancing and low confidence, leading to a big drop in social consumption, especially for recreation, leisure and travel.

In addition, investment fell markedly, as waning business confidence and deteriorating financial positions lead to the postponement and cancellation of projects. Exports have also been undermined by a fall in international demand for UK goods and services, as other countries enforce lockdown or social distancing measures to varying degrees.



Supply side factors have reinforced this trend, such as the temporary closure of factories and businesses and disruptions to supply chains.”

3.14 In the October 2020 report, Experian forecast a ‘near-term’, ‘central/medium’ and ‘long term’ outlook. This Retail and Leisure Study incorporates forecasts based on the Experian ‘central/medium’ term outlook, assuming that an effective medical treatment (the vaccine) is in place by around mid-2021, enabling the recovery to regain momentum as confidence recovers. Research by Savills, GfK and Bank of England (below) currently supports this central trend based on the UK’s swift vaccine roll-out.



3.15 At the time of writing, the vaccine roll-out is progressing swiftly and smoothly as expected under the ‘central/medium’ term scenario. As social distancing measures unwind, social consumption is expected to recover; and alongside this, some correction in the share of online spending is assumed, but it will nevertheless remain elevated compared to pre-Covid-19 projections.

3.16 Moving forwards, Experian explain that recovery over the coming years will be shaped by the course of the pandemic, the success of measures to contain it and the extent of potential scarring to the UK’s longer term economic potential. The unprecedented nature of these issues means all forecasts will be subject to greater than usual uncertainty, with the following key variables:

- How long social-distancing is in place;
- How successful government measures are in mitigating the economic impact on households and businesses;
- The rebound of household and business confidence levels;
- Global backdrop including trade and supply chain impacts on industry.

3.17 Government finances have deteriorated markedly following exceptional measures taken to support the economy. Over the medium term, fiscal policy will likely be a constraint on growth as corrective measures such as spending cuts or tax rises may be required. It is expected that monetary policy will remain supportive over the medium term, with interest rates expected to remain at exceptionally low levels of the foreseeable future.



### Online and Multi-Channel Retailing

- 3.18 Online spending has become a firmly established method of shopping. Evidence demonstrates the continued growth of this sector in terms of those that have internet access, those that use the internet every day, the methods and modes used to undertake such transactions, and the breadth of the population taking advantage of what is on offer, with the largest rise in the 65+ age group in recent years.
- 3.19 Recent data from the ONS confirms the extent to which online platforms now form part of the population's shopping habits. The most recent data available from the ONS on online usage is from August 2020, which identified that:
- In January to February 2020, 96% of households in Great Britain had internet access, up from 93% in 2019 and 57% in 2006 when comparable records began.
  - Over 85% of adults use the Internet every day. Daily internet usage has more than doubled since 2008.
  - In January to February 2020, 76% of adults in Great Britain used internet banking, increasing from 30% in 2007 and 73% in 2019.
  - 78% use mobile phones/smartphones to access the Internet. In certain age groups this figure is substantially higher: in the 25-34 year old age group, the figure is 99%; for 16-24 year olds it is 98%; and for 35-44 year olds it is 96%.
  - In January to February 2020, 87% of all adults shopped online within the last 12 months, up from 53% in 2008; those aged 65 years and over had the highest growth, rising from 16% to 65% over this period.
  - In August 2020, 100% of adults in the 16-24 and 25-34 old age group shopped online; and over 96% of 35-54 age group shopped online. By contrast, only 67% of those over 65 years shop online - however this age group has shown the largest increase in online shopping uptake, increasing from 48% in 2018, and 16% in 2008.
- 3.20 When looking at the frequency of online shopping and the amount typically spent online, it can be seen that considerable amounts of spend are now being diverted online, which is spend lost from 'bricks and mortar' town centre stores. The ONS identifies that:
- Of those adults who purchased online in the last three months, adults aged 16-24 typically shopped online once or twice; however those in the 25-34, 35-44 and 45-54 age groups most typically shopped online at least ten times over a three month period. In the 35-44 age group, 48% shopped online more than ten times over the three month period.
  - Across all age groups, shoppers typically spent between £100 and £499 online in the last three months. In the 35-44 year age group, 30% of adults spent over £1,000 online in the three month period.
- 3.21 Considerable amounts of spend are now being diverted online, which is spend lost from 'bricks and mortar' town centre stores. The most popular categories are



clothes and sports goods, followed by household goods, holiday accommodation, tickets for events, travel arrangements, and films and music. Four out of these six goods categories are those which have historically been purchased through physical high street stores, and the shift of spending to online platforms has resulted in a number of operators ceasing to trade or reducing their network.

3.22 Importantly for town centres, it has been evidenced that only 15% of online shoppers buy all of their fashion items online, with the remaining 85% using both online and physical stores. This highlights the importance of having a 'joined-up' town centre 'experience' to lure shoppers away from the internet and instead to visit the high street and to extend their dwell time through a range of retail and leisure attractions.

### Click and Collect

3.23 Research indicates that the click and collect market will grow by a further 46% by 2023. Click and collect allows a shopper to order and pay for a product online, and then have it delivered to the nearest physical retail store of that operator. This is an important opportunity for town centres, as it can act as a footfall generator in its own right. Research demonstrates that 39% of consumers make an additional purchase in that town centre when collecting an item from a store.

3.24 John Lewis, for example, state on their website press releases that "in the last five years alone, Click & Collect orders have increased more than 50% as customers enjoy the ease and convenience it provides. Currently 57% of all online orders are delivered through this service with 25% of packages collected at John Lewis shops and 75% at Waitrose shops".

3.25 A challenge to the continued growth of click and collect is the rise of instant delivery and saver delivery services, as businesses aim to match efficient delivery options and consumer expectations. This includes same day delivery, one-hour delivery windows, and delivery passes whereby a consumer pays an annual subscription to guarantee same day, next day or timeslot delivery options. The impact of this on click and collect and associated opportunities for town centres will need to be monitored.

### High Street Losses

3.26 The economic trends referred to above, combined with the continued growth in on-line sales have had a significant and permanent impact on consumer shopping and spending behaviour. In turn, this has created significant hurdles for traditional 'bricks-and-mortar' retailing and the high street.

3.27 These national trends have added to operator challenges already being experienced as a consequence of the retail property business model. Notably, operators face high costs of running retail outlets, including rents, business rates and high labour costs; they experience low profitability caused by high costs, slow growth in sales, squeezed profit margins and heavy price competition. They have been slow to respond and to prepare for the fast-paced changes being experienced on the high street, overlooking and disregarding the need to invest.



3.28 Operators have experienced a significant impact from the economic environment, the rise in online shopping and the property market, with many high profile high street casualties in recent years. Many operators will survive, but may instead look to rationalise their store portfolios. In recent years, the following found themselves in administration and in many cases, closure:

- Beales (2020)
- Hawkins Bazaar (2020)
- Top Shop / Top Man
- LK Bennett (2020)
- Oasis and Warehouse (2020)
- Dorothy Perkins (2020)
- Miss Selfridge (2020)
- Burton (2020)
- Jaeger (2019)
- TM Lewin (2020)
- Kath Kidston (2020)
- Laura Ashley (2020)
- Mothercare (2019)
- Select (2019)
- Debenhams (2019)
- Edinburgh Woollen Mill (2019)
- HMV (2018)
- House of Fraser (2018)
- Poundworld (2018)
- Conviviality Retail (2018)
- Maplin (2018)
- Toys R Us (2018)
- Palmer & Harvey (2017)
- Store Twenty One (2017)
- BHS (2016)
- Brantano (2016)
- Phones4U (2014)
- HMV (2013)
- Blockbuster (2013)
- Comet (2012)
- Clinton Cards (2012)
- Game (2012)
- Peacocks (2012)
- JJB Sports (2012)
- Alexon (2012)
- Focus DIY (2011)

3.29 The Covid-19 Grimsey Review (June 2020) references statistics published in the months just prior to the pandemic by CBRE, highlighting the stark downturn in the retail property market. The report quotes a 42% fall in retail property investment between 2014 and 2018; a 78% drop in shopping centre investment over the same period; and a 47% drop in the value of retail property assets changing hands between 2017 and 2018. The report adds that there were no new shopping centre openings in 2019, although some were extended, whilst a third of London shopping centres were subject to planning applications for at least some element of conversion to residential use.

3.30 It is predicted that the Covid-19 pandemic will drive a substantial amount of retail property into the hands of insolvency practitioners over the next few months.

### Commercial Leisure Sector

3.31 In recent years, the commercial leisure sector has played an increasingly important role in the vitality and viability of town centres, as the nature of town centres continues to evolve. In many new town centre schemes, a cinema or family/casual dining has replaced retail as the 'anchor', driven by the growth of this sector and the need for town centres to generate a more varied visitor experience.



- 3.32 Leisure uses will continue to be important attractors in town centres, but the casual dining sector has now reached saturation and increased competition is leading to casualties. Analysts suggest that in addition to market saturation, the rise in food costs, staff costs, rents and business rates have all impacted on operators' profits; as well as emerging on-line delivery companies such as Uber Eats, Deliveroo and Just Eat.
- 3.33 The consequences of Covid-19 and associated lockdown and social distancing, will have further far-reaching impacts on the leisure and casual dining sector.

### The Convenience Sector

- 3.34 The trends being experienced in the food retailing sector were establishing themselves to varying degrees at the time of the 2013 Retail Study update. Food superstores have experienced a substantial decline in market share, small format top-up stores are gaining market share, discount retailers – Aldi and Lidl – are achieving strong growth, and on-line spend is continuing to grow although not to the same extent as non-food shopping. The market leaders pulled back on large superstore openings a number of years ago, and whilst small convenience stores continue to open this is not at the same pace as that seen in recent years.

### Banks and Financial

- 3.35 The services of the high street banks have traditionally been delivered through their branch networks, meaning that in town centres at all levels in the hierarchy the presence of a wide range of banks and building societies formed an important part of a centre's mix of uses. The numbers of bank branches in the UK have been in decline for the past thirty years, due to a variety of reasons including the desire by banks to cut costs; mergers within the industry; competitive pressures from new entrants in the banking sector; changes in the nature of retail banking transactions; and a growth in alternative means of accessing bank services, particularly driven by technological advances such as online and mobile banking.
- 3.36 According to research from CACI<sup>1</sup>, customer visits to retail bank branches are forecast to drop by 36% between 2017 and 2022, with mobile transactions rising 121% in the same period. CACI estimate that the typical person will visit a retail bank branch just four times a year, down from seven in 2017. Most banks have an alliance with the Post Office (whose own branch network has remained relatively stable in recent years), meaning that in most smaller centres there are still banking facilities available to those who are not able to use alternative means. However, the decline of bank branches has also served to free up large, often historic and listed commercial premises in central town centre locations, which are in some instances challenging to let.

### Out-of-Centre Retailing

- 3.37 Out-of-centre retailing offers the benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict (national retail intelligence and trend analysts), out-of-town retailing is the only form of retailing – pre-Covid-19 –

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<sup>1</sup> Analytical research company, providing operator trend data.



which saw store numbers increase consistently since 2000. The Department for Business, Innovation and Skills reported that the number of out-of-centre stores had increased by up to c.1,800 (25%) since 2000.

- 3.38 The recovery of market confidence which took place in the period since 2013 benefited out-of-town retailing. Vacancy rates fell, footfall increased, and many retailers were seeking expansion in existing – and some new – out-of-centre locations. Some traditional town centre retailers developed out-of-town store formats, including John Lewis which opened a number of ‘At Home’ stores in prominent out-of-centre locations, as well as other traditionally ‘high street’-focussed retailers such as, Next, Primark and H&M.
- 3.39 Even before Covid-19, however, the sector was feeling the impact of a changing market, with a slow-down in new retail parks and a general evolution from mainstream retail to more mixed-use town centre/leisure parks, and a move towards a wider mix of uses including residential. Retail Parks have felt the impact of retail store closures in much the same way as high streets; when businesses close, they close in all locations.
- 3.40 The combined effects of Covid-19 and new, more flexible planning legislation, has brought retail parks back into favour. It is reported (Workman<sup>2</sup>, January 2021) that in the five weeks to 2 January 2021, overall footfall at UK shopping destinations dropped 46% compared to the previous year; but with a drop of 50% on the high street and only 17% at retail parks. The resilience of retail parks throughout the pandemic led to a ‘flurry’ of investor acquisitions at the end of 2020, with destinations meeting the needs of suburban home workers, enabling social-distancing, offering click and collect, and more spacious environments. The strong weighting to ‘essential’ items also meant many could continue trading during ‘lockdown’.
- 3.41 Workman state:
- “retail parks are not just being snapped up with the intention of repurposing into last mile distribution centres or residential. Most have attracted investment due to their broad base of essential retailers, with a perceived lower risk of insolvency.”
- 3.42 The introduction of more flexible planning regulations, including a new combined commercial Use Class E and permitted development from Use Class E to residential, makes such destinations attractive investments. Owners have more flexibility in respect of operator line-up and the mix of acceptable uses, with strong opportunities for increased site intensification and place-shaping visions.
- 3.43 Cambridge has a relatively extensive retail warehouse provision, including the Beehive Centre, Newmarket Road and the Cambridge Retail Park. Each retail warehouse destination has an influence on shopping patterns in the Cambridge catchment area; and this is discussed further in the following section. The composition and role of each is likely to be reviewed over the Local Plan period in

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<sup>2</sup> Workman is the largest, independent commercial property management and building consultancy firm in the UK.



the context of market trends and new planning legislation. The role of retail at these retail parks should be monitored moving forwards.

## Summary

- The role of town centres as a focus for retail remains relevant in today's market to draw in shoppers and footfall. Current thinking and research consistently repeats, however, the need to look beyond the role of retail in order to reinvent the high street, emphasising that the town centre of the future must add an extra dimension to the retail experience. Covid-19 and new planning legislation have and will continue to accelerate these trends. Away from the high street, the composition and role of out-of-centre retail and retail parks will almost certainly evolve towards more mixed uses spaces and places as a consequence of the same factors.
- It is apparent that these 'extra layers' are in addition to the core retail role, but should be closely connected to ensure a joined-up experience within a comprehensive town centre strategy. Investment in a wider mix of land-uses and public realm/public space improvements will benefit a consolidated retail offer, leading to improved town centre footfall activity. Short-term investment projects alongside longer term investment for major projects can have far-reaching positive benefits to the performance of a town centre.



## 4. Sub-Regional Context

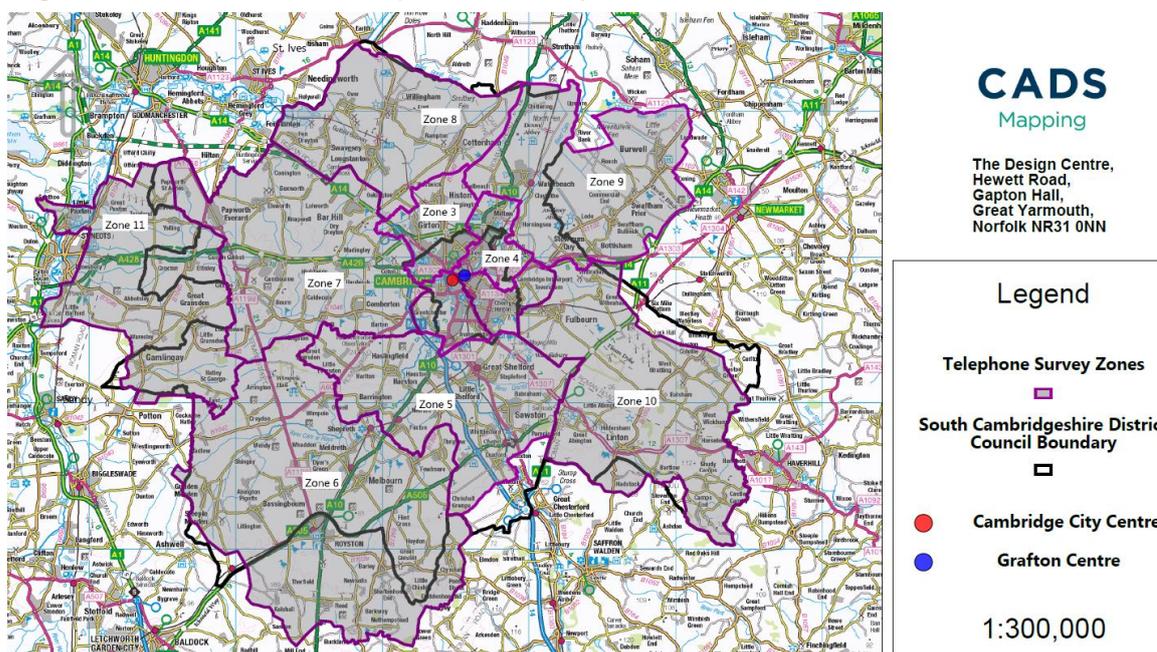
- 4.1 In this section, we set out the sub-regional context within which the town centres in Greater Cambridge operate. Administrative areas are not 'closed systems' and it is natural to expect a degree of expenditure inflow from beyond the Greater Cambridge study area, and also expenditure leakage to the surrounding network of town centres and other shopping destinations outside Greater Cambridge.
- 4.2 The analysis of catchment areas and trade flows form an important input to the baseline. It enables historic trend line market share data to be explored, leading to an understanding of whether the influence of a town centre in the sub-region has improved or declined over time. The data identifies catchment areas and opportunities to enhance trade draw in the future, highlighting key influences in the form of planning commitments and planned development which may enhance the market share of a shopping destination over the plan period.

### Household Telephone Survey

- 4.3 The household telephone survey area is illustrated in Figure 4.1 below. A total of 1,100 households across 11 survey zones were interviewed, and data collection was completed before the start of the Covid-19 pandemic. Zones 1-10 of the survey area replicates the previous 2008 and 2013 survey areas to ensure direct comparisons and the identification of trends over time. An additional 'Zone 11' has been added to ensure the western part of the catchment area is fully captured for the purposes of this new and up-to-date evidence base.
- 4.4 The questionnaire was designed in consultation with the Council and NEMS Market Research, who undertook interviewing and data processing in November 2019. The findings explore where residents living within the survey area are travelling to for their spending on different types of goods including convenience, comparison and leisure uses. The named destination might be within or outside the survey area, thus allowing us to gauge levels of influence on shopping patterns and trade flows.



Figure 4.1: Household Telephone Survey Area, 2019



## 2013 Retail & Leisure Study Update - Overview

- 4.5 The 2013 Retail and Leisure Study Update examined the retail performance of Cambridge City Centre in the context of the retail network across the wider sub-region. The analysis focused on the shopping catchment, trade flows, the profile of competing centres, and a detailed town centre health check of the city centre.
- 4.6 The 2013 Study concluded that Cambridge city centre continued to be the most dominant comparison goods shopping destination in the sub-region, reflecting the extensive offer split across the Historic Core and Fitzroy/Burleigh area. The Historic Core had benefitted from the opening of the John Lewis anchored Grand Arcade (March 2008) and the Land Securities Christ's Lane development (2007) which attracted a number of mid-high end operators. The Fitzroy-Burleigh area was continuing to perform a complementary role alongside the Historic Core, providing a more mainstream retail offer.
- 4.7 There was considered scope at that time to further enhance the range of complementary facilities with identified demand from a number of leisure service operators seeking representation in the city centre. The vacancy rate across the city centre was low, which was considered to be a strong indicator of good health, particularly in the economic climate at that time. The study concluded that the low vacancy rate was also reflective of the strong levels of demand for the city centre, frustrated by historic constraints and limited scope for further physical expansion.
- 4.8 Despite improvements in the centre's comparison retail offer, the survey evidence at that time indicated a marginal decline (5%) in the city centre's market share (from 62% to 57%) since 2008. The 2013 study noted that this was 'unexpected given the opening of the Grand Arcade which should have boosted the City's market share', but emphasised the growth in out-of-centre competition, which increased market share substantially from 15% in 2008 to 24% in 2013.



Conclusions recommended resisting further out-of-centre development and resultant direct competition with the city centre.

- 4.9 Beyond the city centre, retail warehousing provision in Cambridge was highlighted as contributing to the comparison shopping offer/trade retention, including the Beehive Centre, Cambridge Retail Park and 'other' units on Newmarket Road. The 2013 study estimated that the city centre (56.5% market share) and out-of-centre (23.7% market share) retail provision together retained c.80.2% of expenditure generated within the survey area - a strong level of retention reflecting the prominence of Cambridge city centre as a sub-regional retail destination, and also the strength of out-of-centre retail warehousing just outside the city centre.
- 4.10 The 2013 study identified baseline 'need' to support c.14,000 sq m net of comparison goods floorspace by 2022, growing to c.30,000 sq m net by 2031. Conclusions recommended these be 'upper thresholds' and recognised continued trends upwards in special forms of trading (SFT) including on-line sales. The study recommended that identified floorspace 'need' be directed to the city centre in the first instance and, given the constraints of the historic core, the Fitzroy/Burleigh Street area should be the focus for new floorspace growth.

### **South Cambridgeshire**

- 4.11 The retail and town centre offer in South Cambridgeshire was last surveyed and analysed in 2008 as part of the previous 'Cambridge Sub-Region Retail Study'. Health checks of thirteen Rural Centres were undertaken, and a qualitative and quantitative analysis of the major foodstores completed. It was concluded that the centres in South Cambridgeshire do not have a significant comparison goods shopping role, performing as local 'everyday' destinations. Whilst important in the Greater Cambridge retail hierarchy, the data indicates that they have little influence beyond in the wider sub-region. Their current role and performance within Greater Cambridge is discussed in more detail in later sections.

### **2020 Sub-Regional Shopping Patterns**

- 4.12 Consistent with the 2008 and 2013 studies, the up-to-date household telephone survey (2019) enables us to understand the performance of Cambridge city centre in the context of the retail network across Greater Cambridge and the wider sub-region, examining the influence of competing destinations and the associated flows of retail expenditure and levels of trade retention.
- 4.13 Shopping patterns derived from the Zone 1-11 household telephone survey enable us to calculate the amount of comparison goods expenditure that each competing centre/destination draws from the defined Greater Cambridge survey area. As well as the strength of the retail offer, this indicator takes into consideration accessibility and distance across the Greater Cambridge sub-region. The total expenditure travelling to these destinations is set out in Table 4.1 below.



Table 4.1: Study Area Comparison Goods Expenditure Flows

-	Drive Time from Cambridge City Centre	2020 Trade Draw (£m)	2020 Trade Draw (%)
Cambridge City Centre (Historic Core)	-	£577.3m	50.2%
Grafton Shopping Centre, Cambridge City Centre	-	£40.9m	3.6%
Cambridge City Centre – combined	-	£618.2m	53.8%
Cambridge Retail Park, Newmarket Road	1.5 miles	£122.9m	10.7%
Beehive Centre, Coldhams Lane (including Asda)	1.5 miles	£41.8m	3.7%
Bar Hill (including Tesco Extra)	8.0 miles	£24.2m	2.1%
Tesco Extra, Old North Road, Royston	15.0 miles	£20.6m	1.8%
Royston Town Centre	14.0 miles	£19.8m	1.7%
Retail Warehousing, Newmarket Road	1.5 miles	£18.8m	1.6%
Tesco Superstore, Milton	4.0 miles	£15.7m	1.4%
St Neots Town Centre	19.0 miles	£15.5m	1.3%
Newmarket Town Centre	14.0 miles	£12.4m	1.1%
Huntingdon Town Centre	20.0 miles	£12.3m	1.1%
Biggleswade Retail Park, Biggleswade	20.0 miles	£9.4m	0.8%
Letchworth Town Centre	27.0 miles	£7.6m	0.7%
Saffron Walden Town Centre	15.0 miles	£7.3m	0.6%
Stevenage Town Centre	30.0 miles	£7.1m	0.6%
Ely City Centre	17.0 miles	£6.1m	0.5%
Bedford Town Centre	30.0 miles	£3.4m	0.3%
Haverhill Town Centre	18.0 miles	£3.1m	0.3%

 Orange Accent colour denotes: Destinations within Greater Cambridge

Source: Household Telephone Survey, November 2019

4.14 Cambridge city centre is located most central to the survey area, drawing £618.2m of comparison goods expenditure (53.8%) from Zones 1-11. Table 4.2 identifies the market share of Cambridge city centre (including the Grafton Centre) across each survey zone, demonstrating it's strength as a key attractor destination in the sub-region.



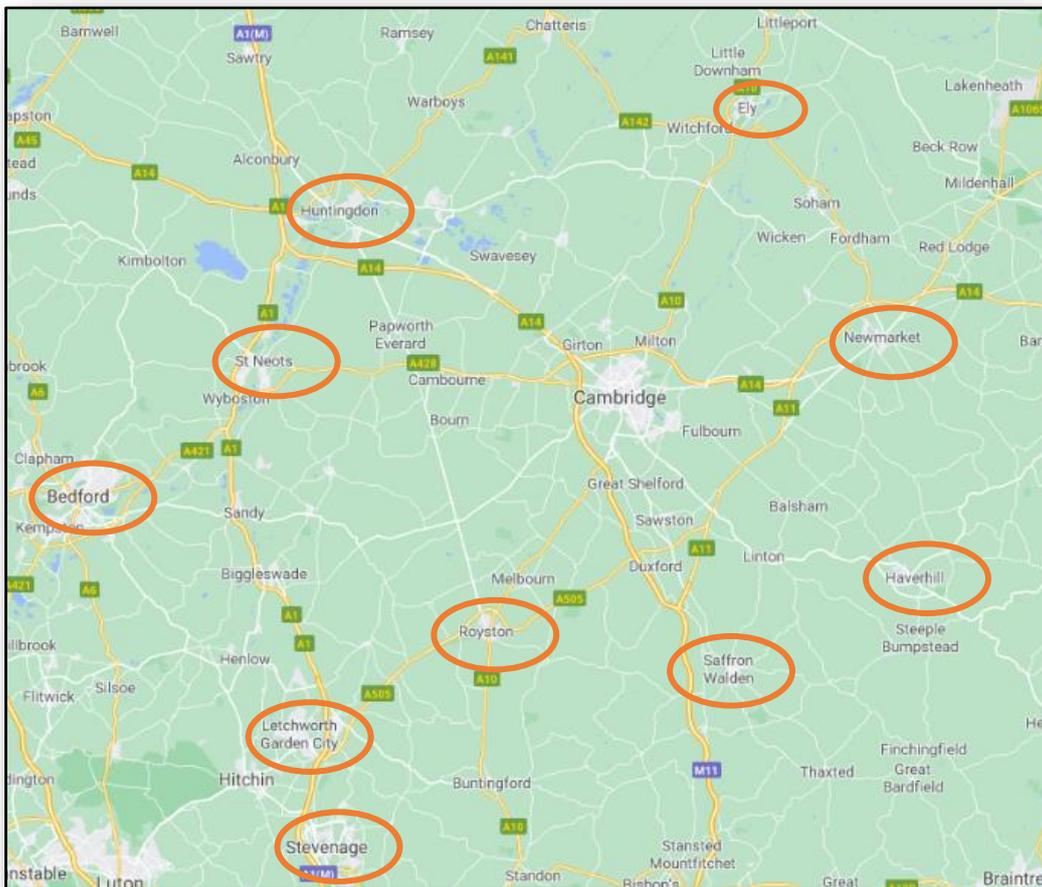
Table 4.2: Cambridge City Centre Market Share (Comparison Goods)

Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
64.1 %	69.2 %	63.6 %	49.3 %	47.9 %	45.6 %	55.7 %	46.3 %	44.9 %	46.6 %	21.4 %

Source: Household Telephone Survey, November 2019

4.15 Town centres and retail destinations outside Greater Cambridge have varying degrees of influence on the shopping patterns of those living within the Zone 1-11 survey area. Figure 4.2 maps these destinations and defines the focus of our analysis (below), drawn from the results of the household telephone survey.

Figure 4.2: Other town centres of choice outside Greater Cambridge



4.16 The survey data enables a closer analysis of the extent of influence of each competing town centre across the individual survey zones. Survey Zones 1-4 are central to the survey area some distance from destinations outside Greater Cambridge, with residents easily attracted – as a preference – to the city centre and nearby retail warehousing. Leakage from Zones 1-4 is, as a consequence, almost negligible. Destinations identified in Figure 5.2 above have some influence in the remaining survey zones, but it is clear that these market shares are



substantially lower than Cambridge City Centre in all survey zones set out in Table 5.1 above:

- Zone 5: Tesco Extra, Royston (4.4% market share)  
Saffron Walden Town Centre (1.2%)
- Zone 6: Royston Town Centre (14.4%)  
Tesco Extra, Royston (12.0%)  
Letchworth Town Centre (4.6%)  
Stevenage Town Centre (4.8%)
- Zone 7: Huntingdon Town Centre (8.7%)
- Zone 8: Ely City Centre (4.0%)  
Huntingdon Town Centre (2.0%)
- Zone 9: Newmarket Town Centre (11.4%)
- Zone 10: Saffron Walden Town Centre (5.7%)  
Haverhill Town Centre (5.6%)  
Newmarket Town Centre (3.9%)
- Zone 11: St Neots Town Centre (25.7%)  
Tesco Extra, St Neots (8.4%)  
Bedford Town Centre (3.0%)

4.17 In total, £132.6m of comparison goods expenditure travels from residents living in Zones 1-11 of the survey area to destinations beyond Greater Cambridge. This equates to only 11.5% of total available comparison goods expenditure, and demonstrates the strength of the city, town centres and retail destinations within Greater Cambridge – particularly the city centre. Cambridge City Centre is the dominant centre within the wider sub-region.

### **Change Since 2013**

4.18 The analysis above noted that in 2013 Cambridge City Centre had a market share of 56.5% across Zones 1-10, whilst out-of-centre retail warehousing achieved a 23.7% market share. In order to explore change since 2013, the new data focuses on Zones 1-10 only (excluding Zone 11) to ensure a like-for-like comparison.

4.19 The data indicates that Cambridge City Centre now has a market share of 55.3% - a reduction of around 1.2%, whilst out-of-centre retail warehousing achieves a market share of only 16.6% - a reduction of 7.1%. In the period since 2013, there has been no major new retail development, either within or beyond Greater Cambridge, and the introduction of competition in the form of bricks and mortar retailing cannot be identified as the reason for this market share adjustment.

4.20 Instead, it would seem consistent with national trends and our in-depth analysis of the sub-region since 2013, that 'special forms of trading' in the form of internet sales is a key reason for the levels of trade diversion and market share decline identified. The impact of on-line shopping on city centre turnover and floorspace performance is discussed in greater detail in Section 11.



- 4.21 Experian stated in February 2020 that the strong increase in on-line shopping in the past decade has lifted the share of special forms of trading (SFT) for comparison goods to a level where it now accounts for just over 18% of total retail sales. This represents a substantial increase from 9.9% in 2013) and helps explain the decline in market share of physical retail floorspace across Cambridge City, as discussed above.
- 4.22 Encouragingly, Cambridge City Centre has been more resilient to an increase in online shopping compared to out-of-centre floorspace, experiencing a fall in market share of only 1.2% between 2013 and 2020. This compares favourably to physical out-of-centre retail floorspace which experienced a larger decline in market share of 7.1% over the same time period.
- 4.23 Experian expect the SFT market share to continue to increase over the forecast period, reaching 22% by 2025 and around 26% of total retail sales by 2040. The implications of this increase have been factored into the quantitative need forecasting in later sections.
- 4.24 The growth of comparison goods floorspace in food superstores is also likely to have been a factor in recent years, as business models have adapted to take a growing proportion of comparison goods market share since 2013. Popular destinations in Greater Cambridge and beyond include Asda, Beehive Centre; Tesco, Cheddars Lane; Sainsbury's, Coldham's Lane; Tesco, Fulbourn; Tesco Milton; Tesco Extra, Bar Hill; and Tesco Extra, Royston.

## Inflow

- 4.25 In-centre shopper surveys were undertaken across the historic city centre and the Grafton shopping centre to feed into the evidence base. The outputs enable an understanding of retail expenditure 'inflow' from beyond the Zone 1-11 survey area which contributes to the performance of retail floorspace across Greater Cambridge. During 2019, the postcodes of 500 people were collected as part of the survey, and the analysis of data identified that 32% of visitors in the city centre live outside the survey area. Cambridge City Centre benefits from an inflow of expenditure of 32%.
- 4.26 It is important to understand how this has changed since the previous evidence base in 2013. To enable this exercise, we have excluded Zone 11 from the inflow analysis. This concludes an 'inflow' of 33% compared to 36% recorded in the 2013 Study, and is – again – likely the consequence of improved product range across food superstores, the growth in on-line retailing, and a growing trend in specialist and niche retailing with customers keen to 'shop local'.

## Summary

- The previous 2013 Study identified a fall in city centre market share in the period since 2008 (62.0% to 56.5%) despite recent major investment in the form of Grand Arcade and Christ's Lane. In contrast, out-of-centre retail warehousing had experienced a strong increase in market share from 15% to 24%. Conclusions recommended resisting further out-of-centre development and resultant direct competition with the city centre.



- Up-to-date evidence demonstrates that Cambridge City Centre has retained market share since 2013 with only a very small downward variation (55.3%, compared to 56.5% in 2013). In contrast, out-of-centre retail warehousing has experienced a strong fall in market share from 24.0% to 16.6%. In the absence of major competing development since 2013, this can be attributed almost entirely to the success of Cambridge City Centre and also the growth in on-line shopping (from 9.9% in 2013 to over 18% in 2020).
- Inflow from outside Greater Cambridge has fallen from 36% in 2013 to 33%, again a direct consequence of a greater product range across food superstores, the growth in online shopping, and a desire to 'shop local'. Moving forwards, and in the absence of major strategic development proposals across the Greater Cambridge sub-region, the greatest threat to city centre market share is online shopping and a larger and stronger out-of-centre retail offer.



## 5. Cambridge City Centre

5.1 This section provides a review of the current vitality and viability of Cambridge City Centre, developing a picture of its current performance. The assessment is based on key indicators of town centre vitality and viability set out in the PPG.

### Overview

- 5.2 Cambridge City Centre is located close to the M11 motorway with rail links to London, Birmingham, Ipswich and Norwich. As a city, Cambridge attracts 8.1 million visitors per year<sup>3</sup> and in 2017 was ranked the top destination in the UK for retail by retail specialist Dennis Harper Hobbs in the Retail Vitality Index 2017<sup>4</sup>, and was only out-performed by Westfield London and Knightsbridge.
- 5.3 The central shopping district of Cambridge City is comprised of two major centres: the City Centre and Fitzroy/Burleigh Street (which also comprises the Grafton Centre). The City Centre includes the main network of streets in the historic core of the city, as well as the Lion Yard and Grand Arcade shopping centres. Combined, these two city centres total 2,771,300 sq ft retail floorspace (internal area recorded by GOAD 2018).
- 5.4 The Cambridge City Council area is also served by District, Local and Neighbourhood Centres, as categorised in both the 2008 and 2013 Retail Studies. The relative size of each town centre within Cambridge City is shown in the map below. Further analysis of the District and Local Centres is provided in the next chapter.

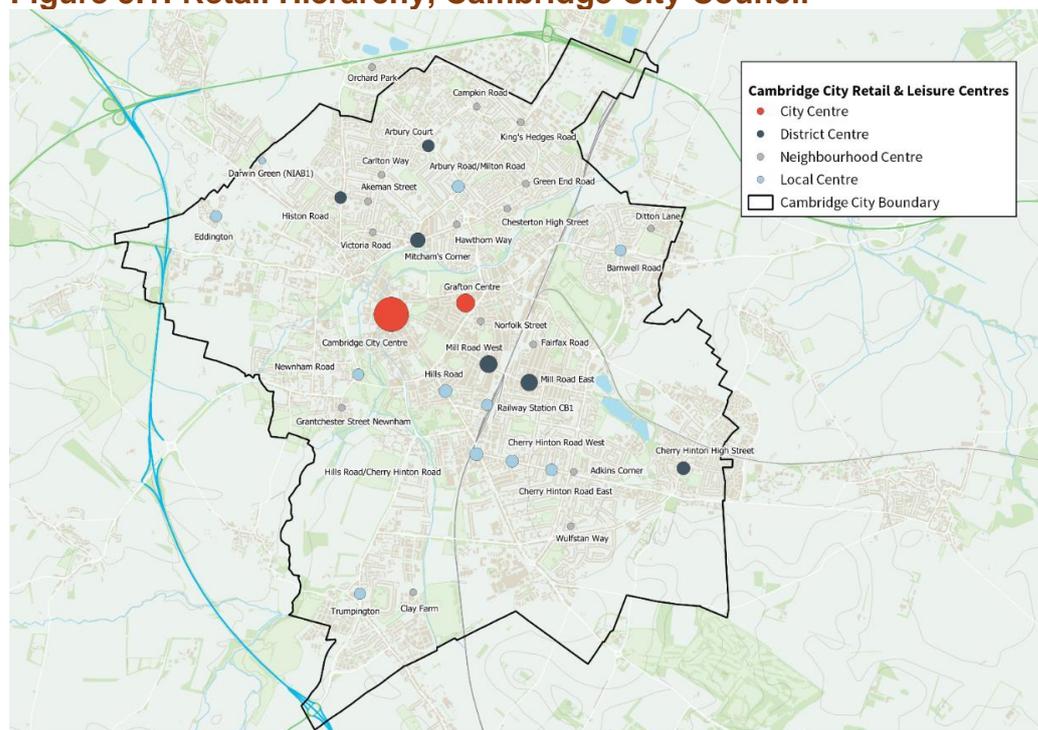
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<sup>3</sup> <https://www.meet-cambridge.com/sector/tourism>

<sup>4</sup> <http://hdh.co.uk/uploads/2017/06/HDH-Vitality-Index-June-2017.pdf>



**Figure 5.1: Retail Hierarchy, Cambridge City Council**



Source: Hatch Regeneris, 2020. Contains OS data © Crown copyright and database right 2019

5.5 Cambridge City Centre encompasses a large area and includes a number of distinct locations. This includes the Historic Core of the City and the Fitzroy/Burleigh Street area (which also incorporates the Grafton Centre). For the purposes of this analysis, they have been considered separately, given the distinctiveness of these destinations, and concerns about a difference in their performance.

### Methodology for Assessment

5.6 The study draws on a combination of primary data collected by site visits to each centre, and secondary data collected by Experian Goad in 2018. Published information is limited due to the size and dynamic nature of many centres, and consequently walkarounds of many town centres were conducted in November 2019. Site visits enabled quantitative analysis of centre composition, as well as more qualitative analysis of centre impressions and potential opportunities for development. Experian Goad data provides detailed and accurate data of individual unit characteristics, including floorspace, occupancy and use class. This study combines these data sources to provide an assessment of Greater Cambridge's town centres in November 2019.

5.7 Whilst undertaking this statistical analysis, the following definitions have been used to identify the types of activity taking place within each town centre.



**Table 5.1 Town Centre Use Definitions**

Type	Description
<b>Convenience</b>	Shops selling food, drinks, tobacco, newspapers, magazines, cleaning materials etc.
<b>Comparison</b>	Shops selling clothes, furniture/carpets/home furnishings, DIY, domestic appliances, specialist non-food (e.g. antiques, bookshops, music shops)
<b>Service</b>	Banks, building, societies, restaurants, takeaways, pubs, local public facilities such as libraries etc.
<b>Leisure</b>	Restaurants, cafes and bars, cinemas, theatres and museums, recreation and sport, hair and personal grooming, betting shops
<b>Vacant</b>	Units which are currently vacant

### Cambridge City Centre: Historic Core

- 5.8 The Historic Core of Cambridge covers the traditional heart of the city centre, which incorporates a large proportion of the city’s retail and service floorspace alongside the University of Cambridge’s Colleges in the area. The area incorporates a number of shopping arcades, including the Grand Arcade and Lion Yard, and at the centre is Cambridge Market Square.
- 5.9 Cambridge City Centre is a key regional shopping centre and busy tourist destination which supports the city’s appeal as a centre for academic study. Based on Experian Goad and the site visit undertaken in November 2019, the city centre currently comprises 123,080 sqm gross internal retail and service floorspace (including leisure) across 770 units. The table below shows the composition of retail units within the Historic Core.
- 5.10 The Historic Core also serves as an important leisure destination, with 31% of units categorised as leisure uses. Many restaurants, cafes and bars spread within the city centre, including chain retailers Carluccio’s, Franco Manca, Pizza Express, Zizzi and Pho as well as many independent outlets.
- 5.11 Service units comprise 12% of all units, and convenience stores at 5% of all units. Supermarket offer in the centre is limited to a Sainsbury’s and M&S Simply Food.
- 5.12 The Historic Core had 8% vacancy rate by unit at the time of the study, representing 81,700 sq ft or 4% of total floorspace. This represents a 0.7 percentage point increase from the 2008 study, but a -0.3 percentage point decrease over the last five years (2013 study).



**Table 5.2: Vacancy Rates in Cambridge Historic Core**

Vacant Units	% Vacant Units	Vacant Floorspace (sqm)	% Vacant Floorspace	Unit Vacancy Change 2008-2019	Unit Vacancy Change 2013-2019
51	8%	7,590	4%	+0.7% pt	-0.3% pt

Source: GOAD, 2018 and previous Retail and Leisure Studies

- 5.13 Relative to the rest of the UK (54%), Cambridge’s Historic Core has a much higher proportion of comparison and leisure units, combined accounting for 74% of all units in the town centre. In terms of floorspace, there is a similar trend, although this is much more pronounced in comparison floorspace, with 51% of floorspace being comparison in the Historic Core compared to 34% nationally. There is a lack of convenience floorspace within the Historic Core, accounting for 5% of retail floorspace in the area, compared to 15% nationally.
- 5.14 The vacancy rate in the Historic Core is relatively low, with only 6% of retail floorspace currently vacant compared to 11% nationally. Currently 7,620sqm of floorspace is vacant in Cambridge’s Historic Core, which is 2,256sqm less than in 2013.
- 5.15 Since the previous Retail Study was undertaken, there has been a considerable change in the floorspace composition in the Historic Core. Nearly a third of comparison floorspace has been lost over the last five years in the Historic Core (with a loss of 32,707sqm of comparison floorspace), with a shift towards service and convenience uses. In addition, 1,599sqm of leisure space has also been lost over the same time period. In total, more than 25,625sqm of retail and leisure floorspace has been lost in Cambridge’s Historic Core over the last five years. It is thought that much of this lost space has been converted to other uses, including residential, office and educational uses.

**Table 5.3: Cambridge Historic Core Composition by Number of Units**

Cambridge Historic Core	No of units	%	Variance from UK	Change 2013-18	UK
Convenience	31	5%	-4%	+3	9%
Comparison	248	43%	+13%	-18	30%
Service	72	12%	-13%	+15	25%
Vacant	51	9%	-3%	+7	12%
Leisure	179	31%	+7%	+30	24%
<b>Total</b>	<b>581</b>	<b>100%</b>		<b>+37</b>	<b>100%</b>

Source: GOAD, 2018, Hatch Regeneris Town Centre Walkarounds (conducted November 2019)

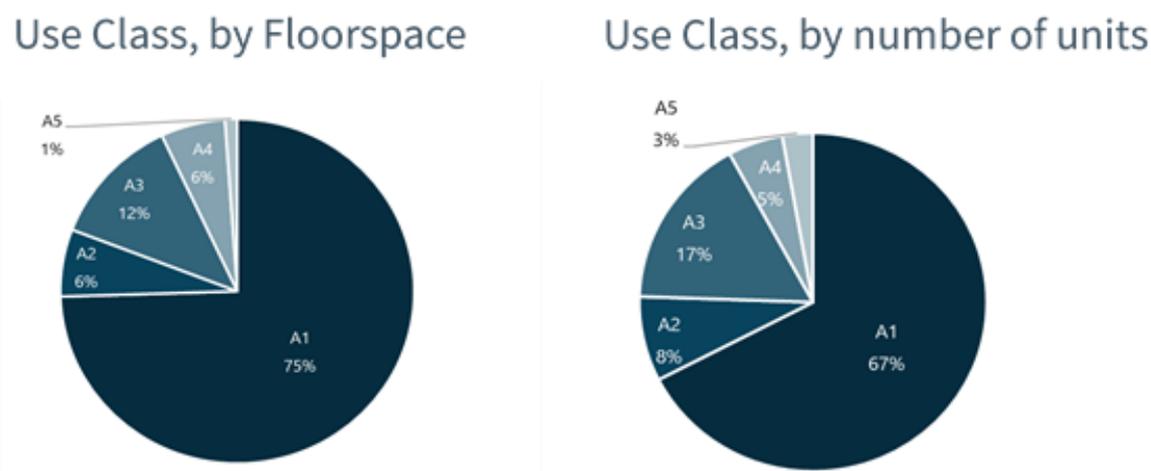


Table 5.4: Cambridge Historic Core Composition by Floorspace

Cambridge Historic Core	Floorspace (sqm)	Floorspace (%)	Variance from UK	Change 2013-18	UK
Convenience	5,690	5%	-10%	+1,862	15%
Comparison	62,360	51%	+17%	-32,707	34%
Service	14,110	11%	-3%	+9,075	14%
Vacant	7,620	6%	-5%	-2,256	11%
Leisure	33,300	27%	+1%	-1,599	26%
<b>Total</b>	<b>123,080</b>	<b>100%</b>		<b>-25,625</b>	<b>100%</b>

Source: GOAD, 2018, Hatch Regeneris Town Centre Walkarounds (conducted November 2019)

Figure 5.2: Use Classes in Cambridge Historic Core, 2020



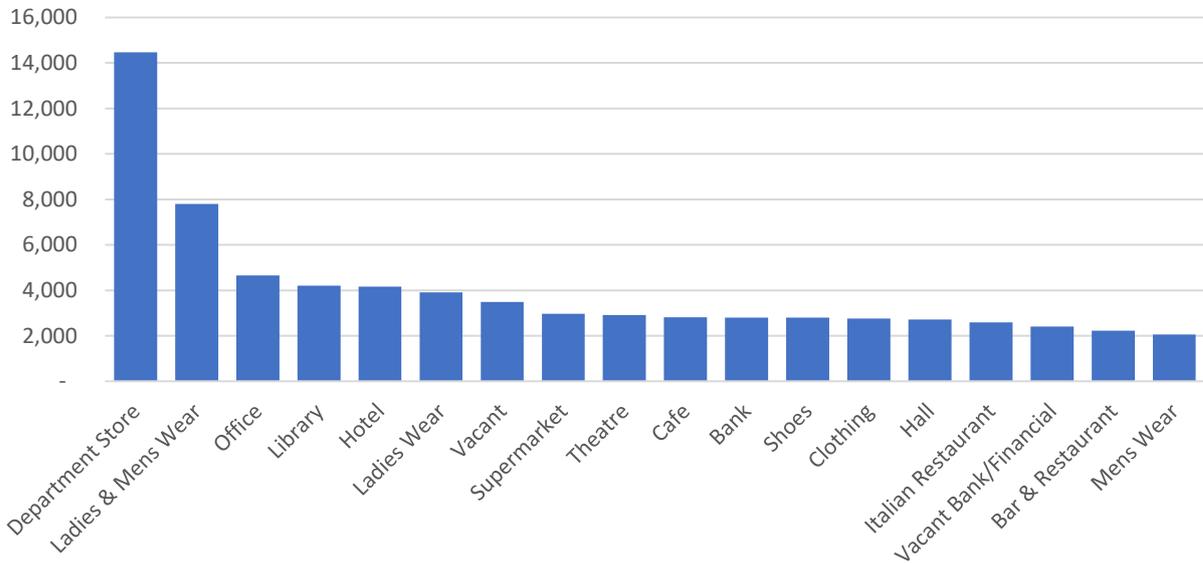
Source: GOAD, 2018

5.16 The Historic Core is comprised of predominantly A1 floorspace (e.g. convenience and comparison shops, post offices and hair salons) representing 75% of all floorspace but only 67% of units. This suggests that retailers within the city centre occupy larger units than other use classes. In contrast, A3 floorspace – which includes food and drink establishments such as cafes, restaurants and takeaways – represents 12% of floorspace but 17% of total units. A2 and A4 occupancy more proportionally reflects the number of units in floorspace occupied.

5.17 Multiple retailers represent 39% of units within the Historic Core, with the remaining 61% of units being non-multiples. There is a large diversity of occupants within the Historic Core including John Lewis, Marks & Spencer, H&M, Sports Direct and TK Maxx. The most common use by floorspace across the Historic Core area shows that department stores occupy the largest floorspace, for example John Lewis at 14,465 sqm.



Figure 5.3: Floorspace by Primary Use for Historic Core (sqm)



Source: GOAD, 2018

Note: Significant floorspace classified as an Educational establishment, Place of Worship or Public Car Park have been omitted from the data.

### Character Areas

5.18 As discussed in the 2013 Retail Study, the Historic Core of Cambridge City has a number of distinctive character areas, in which the retail offer and role varies. Having reviewed these areas during the walkarounds, they still retain many of the characteristics previously displayed in 2013, as summarised below.

Character Area	Key Characteristics
Sidney Street / St Andrews Street	<ul style="list-style-type: none"> <li>The area incorporates two of the main shopping centres within the Historic Core – the Grand Arcade and Lion Yard. The area largely consists of comparison retail uses, with major retailers including H&amp;M, Zara, Sports Direct and John Lewis. There is a wide mix of retailers, from high-end to budget located in this area.</li> </ul>
Trinity Street / Market Area / Sidney Street	<ul style="list-style-type: none"> <li>The market area and the surrounding streets have a more mixed retail offer, which has become more service and leisure focused in recent years. There are a number of high-end retailers operating in this area, alongside more typical retail retailers (e.g. TK Maxx and Marks and Spencer).</li> <li>There is a growing service offering to reflect the high tourist footfall in this area. This includes both restaurants</li> </ul>



Character Area	Key Characteristics
	(e.g. Franco Manca and Gardenia) alongside cafes and fast-food takeaways (e.g. Five Guys and McDonalds). <ul style="list-style-type: none"> <li>There is a daily market that operates on Market Square, providing a general market from Monday to Saturday and a more specialised local food, arts and crafts market on Sunday.</li> </ul>
Kings Parade	<ul style="list-style-type: none"> <li>This area sits adjacent to King’s College and has a retail offering tailored towards the high number of tourists visiting this area and the characteristics of the local buildings. There are a number of smaller-sized retail and service outlets, including boutique clothing stores, cafes and restaurants.</li> </ul>
Regent Street	<ul style="list-style-type: none"> <li>Regent Street connects the Historic Core to the train station (by continuing along Hills Road) and sits adjacent to Downing College. The area consists largely of a service and leisure mix, and includes outlets such as Pizza Hut, Gourmet Burger Kitchen and Pizza Express alongside many independent takeaway outlets.</li> </ul>
Bridge Street	<ul style="list-style-type: none"> <li>Stretching to the North of the Historic Core, Bridge Street is much more service orientated, with a large presence of eating and drinking outlets. There is a high representation of national chains here, including Cote Brasserie, Prezzo, Las Iguanas, Crepeaffaire and Patisserie Valerie.</li> </ul>

## Customer Views and Behaviour

5.19 An in-centre shopper survey, engaging 500 visitors to Cambridge City Centre, was undertaken during November 2019. The interviews were split, with 300 taking place in the historic core and 200 being undertaken in the Grafton Centre. The survey asked a series of qualitative attitudinal questions probing respondents about their usage of the city centre, their likes and dislikes, and how they think it could be improved in the future. The key findings in respect of the historic core are detailed below:

- i. When asked what the main purpose of their visit was, the highest responses included non-food shopping (31.9%); work/business (15.3%); educational purposes (13.3%); both food and non-food shopping (11%); social/leisure purposes (6%); window shopping/browsing (5%); to visit the market (4.3%); and to visit the library (3.3%). The responses demonstrate the variety of attractions, roles and activity underpinning the vitality and viability of the historic core, drawing people into the city centre shopping area.
- ii. Secondary/‘other’ activities include visiting cafes and restaurants (27.2%); visiting the market (18.3%); non-food shopping (14%); food and non-food



- shopping (10.3%); window shopping/browsing (9%); visiting bank/building society (6%); and visiting the post office (4.7%).
- iii. Over 99% of respondents stated that they intend to 'shop' when in the historic core, irrespective of their main reason/s for visiting the centre. Again, the data demonstrates the contribution of other activities (such as business and education, for example) to the health and vibrancy of the city centre. The city centre shopping offer combined with other activities also drives a long dwell time, with almost 88% of respondents staying in the centre for over 3 hours.
  - iv. Respondents were asked what they have or expect to buy on the day of the survey. It was a multiple response question with answers including food and groceries (68.8%); gifts, jewellery, china and glass (61.7%); clothing/footwear (34.2%), health and beauty/chemist (16.3%); books, DVD's, toys and hobbies (14.9%); greeting cards (12.5%); confectionary/tobacco (7.1%); and newspapers/magazines (4.7%).
  - v. Respondents were asked the main reason for choosing the historic core as their destination of preference; with 36.9% stating the choice of shops and services. A further 23.6% stated the general character/appearance of the centre; 17.3% stated that it was 'close to home'; and 10.3% stated that it was 'easy to walk around'.
  - vi. The continued attraction of the historic core as a 'regional shopping destination' is demonstrated by the length of the journey, with 57% travelling for over 30 minutes. In terms of mode of transport, 26% travelled by car; 37.2% by bus/coach; 15% walked; 9% travelled by bicycle; 5% by train; and 8% park & ride. The proportion of people travelling by car is low and reflects well on the city's sustainability credentials.
  - vii. In terms of 'parking', Madingley Road Park & Ride car park is the most popular amongst respondents, with 29.4% choosing this parking destination. Elsewhere, visitors are parking in Trumpington Park & Ride (12.7%); Lion Yard/Grand Arcade Multi-Storey (10.8%); Grafton West Level 2 car park (6.9%); Milton Road Park & Ride (6.9%); Newmarket Road Park & Ride (4.9%); and Grafton East Multi-Storey (4.9%).
  - viii. Almost 25% of respondents expressed the view that their car park was expensive, whilst 46.1% described their car park of choice as good, very good or great.
  - ix. Respondents were asked how often they visit the historic core for a variety of retail shopping and retail service reasons; the responses are recorded in Table 5.5 below. The data highlights that daytime shopping and financial services are the attractors driving the highest frequency of visit (2-3 times a week/once a week), whilst all activities encourage a high proportion to visit at least once a week. Late night shopping is the weakest attraction in respect of frequency of visit.



**Table 5.5: Frequency of Visit for Different Retail Activities**

Frequency	Daytime Shopping	Late-Night Shopping	Financial Services	Personal Services
Everyday/most days	4.0%	0.7%	0.7%	0.3%
2-3 times a week	33.2%	1.7%	11.6%	5.3%
Once a week	34.2%	11.6%	45.5%	28.2%
Once a fortnight	6.6%	5.3%	4.7%	4.3%
Once a month	8.3%	8.6%	7.6%	5.6%
Less often	13.0%	34.6%	16.3%	21.9%
Never	0.0%	37.2%	13.0%	32.2%
(Don't know)	0.7%	0.3%	0.7%	2.0%

- x. Respondents were also asked how often they visit the historic core for a variety of leisure reasons; the responses are recorded in Table 5.6 below. The data highlights that daytime eating/drinking drives visitation rates more than any other leisure activity.

**Table 5.6: Frequency of Visit for Different Leisure Activities**

Frequency	Daytime Eating/Drinking	Evening Eating/Drinking	Nightclubs	Cinema
Everyday/most days	1.3%	0.0%	0.0%	0.0%
2-3 times a week	30.2%	4.0%	0.3%	0.0%
Once a week	38.5%	10.6%	0.0%	1.0%
Once a fortnight	7.0%	5.3%	1.3%	2.7%



Frequency	Daytime Eating/Drinking	Evening Eating/Drinking	Nightclubs	Cinema
Once a month	8.3%	9.3%	5.0%	22.3%
Less often	13.6%	32.9%	10.6%	28.2%
Never	0.7%	35.5%	80.7%	45.5%
(Don't know)	0.3%	2.3%	2.0%	0.3%

- xi. When asked what they liked about the historic core, respondents cited the pedestrian friendly environment (58.1%), the selection and choice of multiple retailers (51.8%), the selection and choice of independent shops (32.6%), that it was near/convenient (32.2%), a feeling of safety (19.6%), and the historic character (17.3%). Other responses included the atmosphere, the beauty and character, and the market and events.
- xii. When asked what they disliked about the historic core, respondents cited the cost of car parking (44.9%), too busy (44.9%), too expensive (29.6%), dangerous bikes and bikes on pedestrian paths (22.9%), lack of car parking (12.0%), the number of homeless people (10.3%), traffic and congestion (14.6%), difficult to access by public transport (6.0%), lack of street cleanliness (6.0%), and that it doesn't feel safe (4.0%).
- xiii. In terms of improvements to encourage households to visit more frequently, the responses included improving bus services and bus access (26.9%), more traffic free areas and pedestrianisation (21.3%), more car parking (21.3%), more/better seating and toilets (16.6%), cheaper car parking (15.3%), facilities for homeless (13.6%), improving security and CCTV (13.6%), more specialist and independent stores (13.6%), Bicycle Lanes (11.0%), better maintenance/cleanliness (8.3%), improve environment and appearance (6.0%).
- xiv. Respondents were asked if there was a specific retailer they would like to see in the historic core that wasn't already represented; 82% declined to comment, and the highest response was for more independent shops (12.0%).
- xv. The survey explored the linked-trip relationship between the historic core and the Grafton Centre, highlighting that 25.2% of visitors to the historic core would also visit the Grafton Centre on the same day/outing.

### Cambridge City Centre: Fitzroy / Burleigh Street

5.20 The Fitzroy / Burleigh Street area is located to the East of the Historic Core area and incorporates two pedestrianised streets (Fitzroy Street and Burleigh Street) and the Grafton Shopping Centre.



- 5.21 The Grafton Centre is a purpose-built shopping centre in Cambridge built in the 1980s. It has recently (2017) undergone a refurbishment programme, including a new entrance and improvements to the shop frontages. The area is well served by public transport connections, including similarly close proximity to the Bus Station (and Park & Ride) as the city centre itself. The Grafton Shopping centre retains the large department store Debenhams as an anchor store.
- 5.22 Fitzroy Street has a similar composition to the Grafton Centre, with many comparison shops located along the road (reflecting the need for pedestrians to travel along this street to access the Historic Core). Key retailers include Poundland, Card Factory and Wilko.
- 5.23 The retail offer along Burleigh Street is more value-orientated, although the recent opening of Primark has increased footfall along this street, providing a new anchor point for the area. Other units on this street are largely independent retailers and charity shops which provide an interesting range of goods and services hard to find in the Historic Core area.
- 5.24 Across the Fitzroy / Burleigh Street area, comparison units are the most prominent, with 40% of units being this type. There are also slightly more service uses than the Historic Core, with an additional 10% of units classed as services. While the Grafton Centre is home to the Vue Cinema Cambridge, leisure uses in the Fitzroy / Burleigh Street area represent only 23% of all units compared to 31% for the City Centre.

**Table 5.7 Fitzroy / Burleigh Street Composition by Number of Units**

Fitzroy / Burleigh Street	No of units	%	Variance from UK	Change 2013-18	UK
Convenience	12	6%	-3%	-3	9%
Comparison	75	40%	+10%	-12	30%
Service	41	22%	-3%	+16	25%
Vacant	17	9%	-3%	-6	12%
Leisure	44	23%	-1%	+6	24%
Total	189	100%		+1	100%

Source: GOAD, 2018, Hatch Regeneris Town Centre Walkarounds (conducted November 2019)

**Table 5.8: Fitzroy / Burleigh Street Composition by Floorspace**

Fitzroy / Burleigh Street	Floorspace (sqm)	Floorspace (%)	Variance from UK	Change 2013-18	UK
Convenience	2,030	4%	-11%	+14	15%
Comparison	31,620	57%	+23%	-8,201	34%
Service	5,110	9%	-5%	+2,407	14%
Vacant	6,880	12%	+1%	+1,910	11%
Leisure	9,570	17%	-9%	+846	26%
Total	55,210	100%		-3,024	100%

Source: GOAD, 2018, Hatch Regeneris Town Centre Walkarounds (conducted November 2019)



5.25 There has been an overall loss of retail and leisure space since the previous retail study was undertaken, with 3,204sqm of space lost between 2013-18. As before, it is not clear what has happened to this space, however it is likely it has been lost to residential or office uses.

5.26 Current vacancy rates for the Fitzroy / Burleigh Street area stand at 8% of units and 6,856 sqm of floorspace. The vacant floorspace is a much higher proportion of total floorspace in the Fitzroy / Burleigh Street area compared to the Historic Core, with vacancy rates higher at 10%. In addition to this, unit vacancy rates may have increased by 0.7 percentage points since the 2008 study, but unit vacancy rates are 3.3 percentage points lower than in 2013.

**Table 5.9: Vacancy Rates in Fitzroy / Burleigh Street**

Vacant Units	% Vacant Units	Vacant Floorspace (sqm)	% Vacant Floorspace	Unit Vacancy Change 2008-2019	Unit Vacancy Change 2013-2019
17	8%	6,856	10%	+0.7% pt	-3.3% pt

Source: GOAD, 2018 and previous Retail and Leisure Studies

### Customer Views and Behaviour

5.27 An in-centre shopper survey, engaging 500 visitors to Cambridge City Centre, was undertaken during November 2019. The interviews were split, with 300 taking place in the historic core and 200 being undertaken in the Grafton Centre. The survey asked a series of qualitative attitudinal questions probing respondents about their usage of the city centre, their likes and dislikes, and how they think it could be improved in the future. The key findings in respect of the Grafton Centre are detailed below:

- i. When asked what the main purpose of their visit was, the highest responses included non-food shopping (52.5%); educational purposes (10.5%); work/business purpose (9.0%); both food and non-food shopping (8.5%); social/leisure purposes (5.5%); window shopping/browsing (3.5%); and to visit cafes/restaurants (3.5%).
- ii. When asked what else they will be doing in the Grafton Centre that day, the highest responses included visiting cafes/restaurants (46.5%); both food and non-food shopping (13.0%), to visit the bank/building society (9.5%), window shopping/browsing (6.0%), and for social/leisure purposes (5.5%).
- iii. 100% of respondents stated that they intend to do some shopping whilst in the Grafton Centre on that visit. When asked what they intended to buy, the responses were varied including food and groceries (58.0%); gifts, jewellery, china and glass (52.5%); clothing/footwear (35%); health and beauty/chemist



items (30%); other household goods (18.5%); books/CD's (17.5%); greetings cards (16.5%); and confectionary/tobacco (9.0%).

- iv. Respondents were asked what was the main reason they chose to go to the Grafton Centre rather than other centres/destinations that day. The highest response was the choice of shops and services (59%); followed by cheap prices (9.5%); easy to walk around (9%); close to home/easy to get to (8.5%); and general character/atmosphere (7%). When asked whether they shopped more frequently in the Grafton Centre or the historic core, 46.5% stated the Grafton Centre; 24.5% stated the historic core; and 13.5% stated both equally.
- v. The survey asked respondents how long they intended to stay in the Grafton Centre that day, and over 88% stated 3 hours or more, highlighting a strong dwell time. This perhaps reflects the business and educational purposes for being in the centre, but does also reflect the range of shopping and café/leisure facilities on offer.
- vi. The Grafton Centre attracts visitors from a wide catchment area, with 47.5% of respondents travelling for over 30 minutes. In terms of mode of transport, 31% of people travelled by car; 34% by bus; 13.5% walked; 6.5% used the park & ride; and 2.5% took a taxi.
- vii. In terms of 'parking', Madingley Road Park & Ride car park and Grafton West Level 2 car park are the most popular amongst respondents (=21.3%); followed by Grafton East multi-storey (18.7%); Milton Road Park & Ride (10.7%); Trumpington Park & Ride (8%); and Newmarket Road Park & Ride (6.7%). When asked to describe the car park they had used, 33.3% stated it was expensive; 30.7% stated it was good; and 18.7% stated it was okay.
- viii. Those that had cycled to the Grafton Centre were asked whether they had trouble parking their bike on that particular day; and 85% said that they had not, whilst 15% stated that they had found it difficult to park their bicycle.
- ix. Respondents were asked how often they visit the Grafton Centre for a variety of retail shopping and retail service reasons; the responses are recorded in Table 5.10 below. The data highlights that daytime shopping drives the highest frequency of visit (2-3 times a week/once a week), followed by financial services. Fewer people use the centre for late-night shopping or personal services (including hairdressers/health & beauty).

**Table 5.10: Frequency of Visit for Different Retail Activities**

<b>Frequency</b>	<b>Daytime Shopping</b>	<b>Late-Night Shopping</b>	<b>Financial Services</b>	<b>Personal Services</b>
Everyday/most days	4.0%	0.5%	1.0%	0.5%
2-3 times a week	16.5%	0.0%	6.5%	1.5%



Frequency	Daytime Shopping	Late-Night Shopping	Financial Services	Personal Services
Once a week	23.5%	7.0%	27.0%	3.5%
Once a fortnight	12.5%	0.5%	7.0%	3.0%
Once a month	15.5%	1.5%	8.5%	2.0%
Less often	22.0%	20.0%	17.5%	15.5%
Never	2.0%	70.5%	32.5%	74.0%
(Don't know)	4.0%	0.0%	0.0%	0.0%

- x. Respondents were also asked how often they visit the historic core for a variety of leisure reasons; the responses are recorded in Table 5.11 below. The data highlights that daytime eating/drinking drives visitation rates more than any other leisure activity, with few people visiting in the evening for eating/drinking, and no-one visiting for nightclub activity given the absence of a venue. The cinema is attracting more local people about once every month or less often.

Table 5.11: Frequency of Visit for Different Leisure Activities

Frequency	Daytime Eating/ Drinking	Evening Eating/ Drinking	Nightclubs	Cinema
Everyday/most days	4.0%	0.0%	0.0%	0.0%
2-3 times a week	15.0%	0.5%	0.0%	0.0%
Once a week	24.0%	7.0%	0.0%	1.0%
Once a fortnight	12.0%	0.5%	0.0%	2.0%
Once a month	15.5%	1.0%	0.0%	11.5%
Less often	23.5%	18.5%	3.0%	22.5%
Never	6.0%	65.5%	92.5%	58.5%
(Don't know)	0.0%	7.0%	4.5%	4.5%



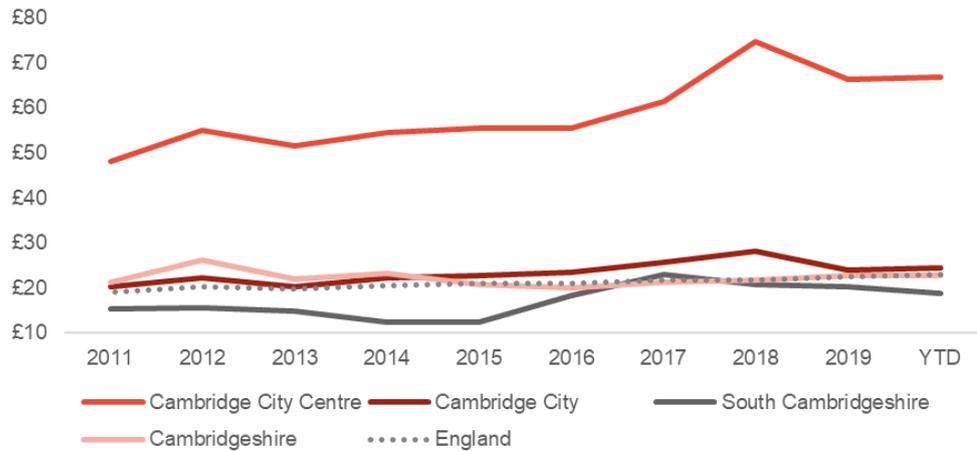
- xi. When asked what visitors most liked about the Grafton Centre, the selection and choice of multiple/chain retailers scored highly (66.5%), followed by 'near/convenient/close to home' (40.5%), the pedestrian friendly environment (29.0%), the selection/choice of independent shops (20.5%), competitive/cheap shops (10%).
- xii. When asked what they disliked about the Grafton Centre respondents stated that it was too busy (30%), the lack of cleanliness of streets (27.5%), cost of car parking (25.5%), the presence of homeless people (24.0%), generally too expensive (11.0%), a poor perception of safety (7.5%), congestion (6.5%), lack of car parking (6.0%), poor selection of independent shops (5.0%).
- xiii. Respondents were asked what type of improvements would make their household visit more often. The list was varied, and included improved security (39.5%), improve appearance and environment (36.5%), better maintenance/cleanliness (29.0%), improved toilet facilities (25%), greater level of pedestrianisation (21%), more specialist and independent shops (20.5%), improved bus access (13%), and cheaper parking (10%).
- xiv. When asked if there was a particular retailer they would like to see at the Grafton Centre, 13% stated more independent shops, and 12% stated Oasis.
- xv. The in-centre visitor survey sought to understand linked trips between the Grafton Centre and the historic core. When asked whether they would also visit the historic core on the same day/outing as their visit to the Grafton Centre, 21% stated that they had/would.

### **Recent Commercial Market Performance**

- 5.28 Retail rental values across the whole of Cambridge City Centre (Historic Core and Fitzroy / Burleigh Street) are significantly higher than the wider area, with rental values in 2020 averaging at £67 per sq ft. For comparison, in 2020 rental values for wider regions are £25 (City Council area), £19 (South Cambridgeshire) and £23 (England).
- 5.29 Retail rental values have generally increased over the last decade, with Cambridge City Centre experiencing the greatest increase of 39% between 2011 and 2020. Meanwhile, rental values in South Cambridgeshire are consistently lower than England except for the year 2017.



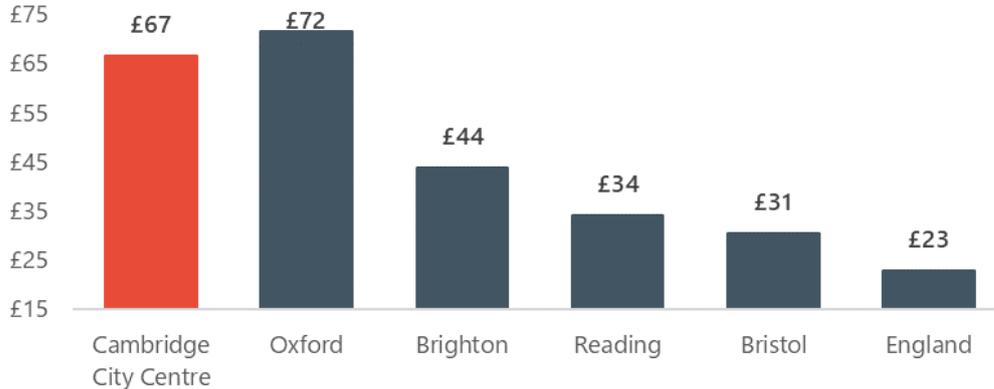
Figure 5.4 Retail Rent per Sq Ft, 2011-2020



Source: CoStar, 2020

5.30 Rental values for retail units in Cambridge City Centre are relatively high compared to a range of comparator cities (Oxford, Brighton Reading and Bristol). Rents in Cambridge City Centre in 2020 are valued at £67 per sq ft, which is slightly lower than Oxford (£72) and considerably above rates in Brighton, Reading, Bristol and national average (£23).

Figure 5.5 Retail Rental Values per Sq Ft across Comparator City Centres, 2020

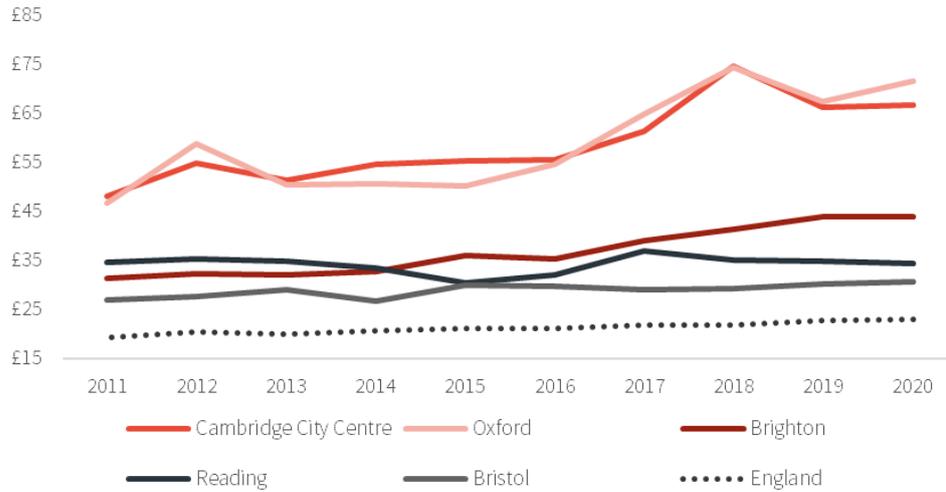


Source: CoStar, 2020

5.31 Between 2011 and 2020, rental values in Cambridge have followed a similar trend to Oxford, with rental values in both cities growing faster than in other comparator cities and values reaching a peak in 2018. Cambridge rental values increased by 39% between 2011 and 2019 compared to Oxford’s increase of 53%. This suggests Cambridge City Centre has some of the highest demand and floorspace value when compared to its comparator cities.



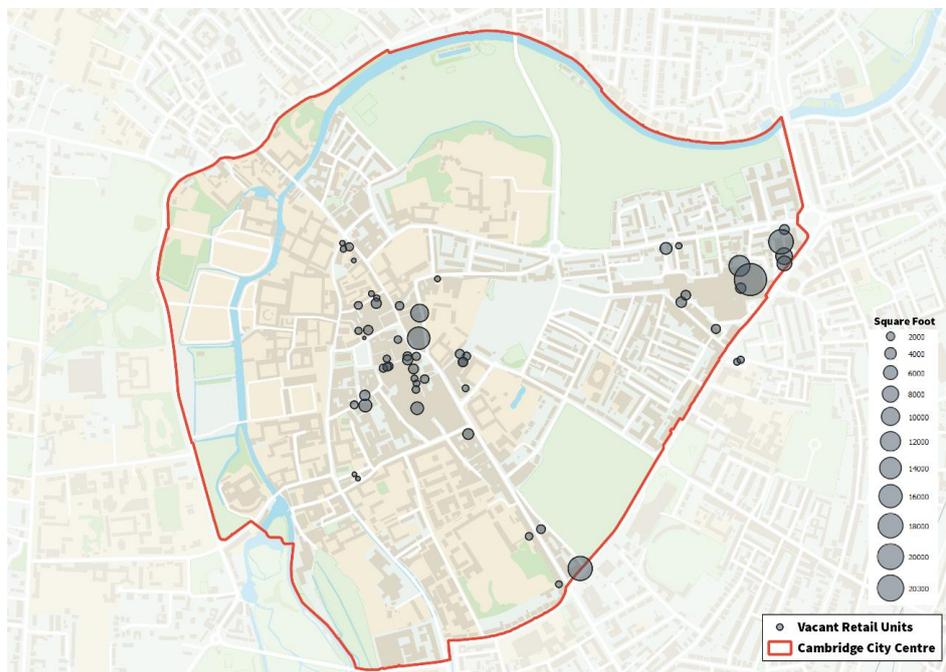
Figure 5.6 Retail Rental Values across comparator cities, 2011-2020



Source: CoStar, 2020

5.32 Analysis of vacant units across Cambridge City Centre, shows there is a clustering of larger vacant units around the Grafton Centre (to the East of the City) and a number of smaller units in and around the Grand Arcade/Lion Yard.

Figure 5.7: Location of Units Currently Vacant in Cambridge City Centre



Source: GOAD, 2018, Hatch Regeneris Town Centre Walkarounds (conducted November 2019)



## Summary

- Cambridge City Centre is performing well against a number of the key health check indicators that have been assessed as part of this study. Since the previous Retail Study was undertaken there is currently less vacant space in both the Historic Core and the Fitzroy / Burleigh Street areas, with around 8% of retail units currently vacant. Relative to other comparator cities across the UK, Cambridge performs very strongly, with retail rental values well above many cities, and similar to Oxford.
- Both the Historic Core and the Fitzroy / Burleigh Street areas have a strong comparison offer, as would be expected in a major city such as Cambridge and this has grown in recent years (e.g. the opening of Primark on Burleigh Street). However there are concerns around the viability of the Grafton Centre in the long-term, with a number of vacant units located here. The recent redevelopment of the Centre in 2017, and new developments to the East of the Grafton Centre have helped to increase footfall, however the long-term impact has not yet been realised.
- There has been a noticeable shift over the last five years from comparison retail to service and leisure uses, reflecting a broader national shift towards these types of activities, as the town centre's offer broadens. Cambridge City Centre has a relatively limited convenience offer, which hasn't changed since the 2013 Retail Study. This reflects the restricted vehicular access in the City Centre, but also a good supply of convenience shops in other locations in Cambridge, including in out-of-town retail locations.
- Cambridge benefits from its historic environment and universities, which attracts tourists and students (including both the University of Cambridge and Anglia Ruskin University) into the City, resulting in high levels of footfall. This is reflected in the retail offer of the town, with high concentrations of retail and leisure units catering to the tourism around Kings College. Visitor survey analysis demonstrates the wide range of reasons and attractions drawing people to the city centre, ensuring a strong baseline position in the context of evolving market trends and multi-dimensional town centres.



## 6. Cambridge District and Local Centres

6.1 Around Cambridge City Centre there are a number of smaller District and Local Centres which provide a local retail presence amongst Cambridge’s suburbs. This section sets out the composition and current performance of these Centres. As there is limited data available on these Centres (given their overall size), Hatch Regeneris have undertaken walkarounds of each Centre to record the type of unit present and its overall characteristics.

Table 6.1: Recommended Retail Hierarchy from 2013 Retail Study

City Centre	District Centres	Local Centres	Optional Neighbourhood Centres
<ul style="list-style-type: none"> <li>Cambridge</li> </ul>	<ul style="list-style-type: none"> <li>Mill Road East</li> <li>Mill Road West</li> <li>Mitchams Corner</li> <li>Arbury Court</li> <li>Cherry Hinton High Street</li> <li>Histon Road</li> </ul>	<ul style="list-style-type: none"> <li>Arbury Road / Milton Road</li> <li>Barnwell Road</li> <li>Cherry Hinton Road West</li> <li>Cherry Hinton Road East</li> <li>Hills Road</li> <li>Newnham Road</li> <li>Trumpington</li> </ul>	<ul style="list-style-type: none"> <li>Adkins Corner</li> <li>Akeman Street</li> <li>Campkin Road</li> <li>Chesterton High Street</li> <li>Ditton Lane</li> <li>Fairfax Road</li> <li>Grantchester Street</li> <li>Green End Road</li> <li>King Hedges Road</li> <li>Norfolk Street</li> <li>Wulfstan Way</li> <li>Victoria Road</li> </ul>

Source: Cambridge Retail & Leisure Study Update, 2013

6.2 There are six District Centres within Cambridge City which range in size from 19 units at Arbury Court to 83 units at Mill Road West. The largest three District Centres are Mill Road West (83 units), Mill Road East (77) and Mitchams Corner (53) and were also classified as District Centres in the 2013 Study.

6.3 Cambridge’s District Centres have higher proportions of leisure, convenience and service units than the City Centre & Grafton Centre, reflecting the different role that District Centres play within the retail hierarchy.

6.4 There are 7 Local Centres within Cambridge City, providing predominantly service and convenience uses. Some Local Centres recorded high levels of leisure uses such as the Railway Station CB1 (70%) and Hills Road/Cherry Hinton Road (58%), whereas comparison units represent a much smaller proportion of total units relative to the Major and District Centres. The 2013 Retail Study identified a 12 optional Neighbourhood Centres, which have a similar role to Local Centres but are smaller in size.



6.5 Since the completion of the 2013 Retail Study, there have been a number of new centres that have been established, reflecting the high level of development taking place across Cambridge. The new centres which have been reviewed for the purposes of this study (in addition to the existing centres) include:

- The Railway Station CB1 - a major regeneration of the Station Road area, which is focused on developing a sustainable mixed-use community adjacent to the station. This has included a range of convenience and leisure-based retail units around the station forecourt.
- Eddington – is a new neighbourhood of 3,000 homes to the North-West of Cambridge, which incorporates a new retail centre and a Sainsbury’s supermarket.
- Darwin Green (NIAB1) – is a new neighbourhood of 1,000 new homes to the North-West of Cambridge, which includes a new retail centre.
- Orchard Park – a new urban extension of 900 new homes, north of Arbury Ward which incorporates a new primary school, employment space, and neighbourhood centre.

Table 6.2a: District and Local Centres Composition by units, 2019

Retail Centre	Convenience	Comparison	Service	Vacant	Leisure	Total
Mill Road West*	13	15	17	9	29	<b>83</b>
Mill Road East*	7	20	18	5	27	<b>77</b>
Mitchams Corner*	7	9	13	6	18	<b>53</b>
Cherry Hinton High Street	7	8	7	1	10	<b>33</b>
Histon Road	7	3	4	1	3	<b>18</b>
Arbury Court	5	3	5	0	6	<b>19</b>
Railway Station CB1	1	1	0	1	7	<b>10</b>
Hills Road	4	5	5	2	14	<b>30</b>
Barnwell Road	1	1	4	1	2	<b>9</b>
Hills Road/ Cherry Hinton Road	4	4	5	1	19	<b>33</b>
Cherry Hinton Road West	2	6	6	1	9	<b>24</b>
Cherry Hinton Road East	7	1	7	1	2	<b>18</b>
Arbury Road/ Milton Road	4	5	4	0	8	<b>21</b>
Newnham Road	1	0	2	1	6	<b>10</b>
Eddington	1	1	0	9	0	<b>11</b>
Trumpington	1	1	4	1	1	<b>8</b>



Retail Centre	Convenience	Comparison	Service	Vacant	Leisure	Total
Orchard Park	1	1	5	0	0	7
Darwin Green (NIAB1)	0	0	0	0	0	0

Source: Hatch Regeneris, 2020

Table 6.2b: District and Local Centres Composition by proportion of units, 2019

Retail Centre	Convenience	Comparison	Service	Vacant	Leisure
Mill Road West*	16%	18%	20%	11%	35%
Mill Road East*	9%	26%	23%	6%	35%
Mitchams Corner*	13%	17%	25%	11%	34%
Cherry Hinton High Street	21%	24%	21%	3%	30%
Histon Road	39%	17%	22%	6%	17%
Arbury Court	26%	16%	26%	0%	32%
Railway Station CB1	10%	10%	0%	10%	70%
Hills Road	13%	17%	17%	7%	47%
Barnwell Road	11%	11%	44%	11%	22%
Hills Road/Cherry Hinton Road	12%	12%	15%	3%	58%
Cherry Hinton Road West	8%	25%	25%	4%	38%
Cherry Hinton Road East	39%	6%	39%	6%	11%
Arbury Road/Milton Road	19%	24%	19%	0%	38%
Newnham Road	10%	0%	20%	10%	60%
Eddington	9%	9%	0%	82%	0%
Trumpington	13%	13%	50%	13%	13%
Orchard Park	14%	14%	71%	0%	0%
Darwin Green (NIAB1)	-	-	-	-	-
UK Average	9%	30%	25%	12%	24%

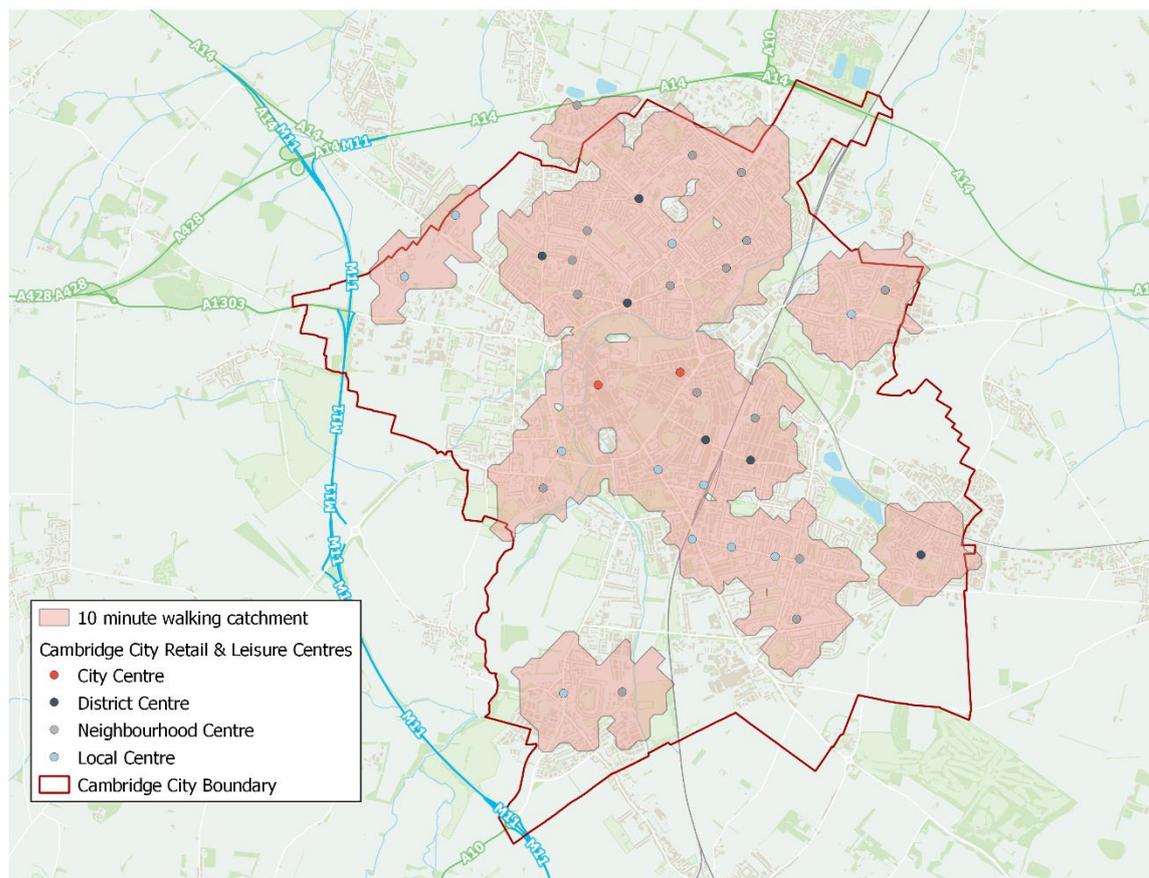
Source: Hatch Regeneris, 2020

6.6 As described in Section 8 of this report, Cambridge is a rapidly developing area, with aspirations for transformative growth in the future. There are a number of other retail centres that are expected to come forward in the near future, although only those which have been started are considered for this assessment.



6.7 The map below highlights the spread of District and Local centres across Cambridge, and also shows ‘walkable neighbourhood’ areas around each centre (10 minute walk times), reflecting the coverage of town centres across Cambridge and their accessibility. It shows that the vast majority of residential areas across the City have access to a District, Local or Neighbourhood Centre within a 10 minute walk. More detailed analysis relating to the economic and demographics around each of these centres has been undertaken in Chapter 4.

Figure 6.1: Walkable Neighbourhoods within Cambridge



Source: Hatch Regeneris, 2019

### Recent Change in Composition of Units

- 6.8 Since the previous Retail and Leisure Study was undertaken in 2013, there has been a shift in the types of units that are present in Cambridge’s District and Local Centres. A key trend has been a net loss of comparison units, and a net gain of service & leisure units.
- 6.9 Overall, the district and local centres gained 9 units between 2013 and 2019, with comparison representing the most significant loss of units (43). Meanwhile, the City gained 44 service and leisure units, 1 convenience and 7 vacant units. This represents a shift towards town centres providing a more leisure-oriented purpose within the Cambridge City Council area.



6.10 Hills Road/ Cherry Hinton Road experienced one of the most notable changes in retail and leisure provision, as the Local Centre gained 11 service and leisure and one convenience unit, while only losing two comparison units. This partly reflects developments around the new Cambridge Leisure Park, providing a new cinema, bowling alley and a range of restaurants.

6.11 While Cambridge City Centre and the Grafton Centre experienced the most significant loss of comparison units between 2013 and 2019 (30 units), the net gain of service & leisure units across the City is distributed over a wider range of Cambridge's Major, District and Local centres, with Cambridge City Centre and the Grafton Centre gaining only 5 of the total 44 additional service & leisure units during this period.

**Table 6.3: Cambridge Retail/Leisure Composition Change 2013-19**

Town Centre	Convenience	Comparison	Service & Leisure	Vacant
Mill Road West*	0	-3	-3	5
Mill Road East*	-1	0	10	1
Mitchams Corner*	-2	-3	-3	3
Cherry Hinton High Street	2	1	0	-1
Histon Road	3	0	4	1
Arbury Court	1	-1	4	-1
Hills Road	1	-1	6	1
Barnwell Road	-1	0	1	1
Hills Road/Cherry Hinton Road	1	-2	11	0
Cherry Hinton Road West	-1	1	0	0
Cherry Hinton Road East	5	-3	3	0
Arbury Road/Milton Road	-8	-1	5	0
Newnham Road	1	-1	1	-4
<b>Total</b> <b>*Also classified as District Centres in 2013 Study</b>	<b>1</b>	<b>-13</b>	<b>39</b>	<b>6</b>

Source: Hatch Regeneris, 2020. Note: Leisure uses are counted under 'Service & Leisure' to enable direct comparison with the 2013 Study (which previously classified leisure uses under 'services')



## Summary

- Cambridge's District and Local Centres have a higher proportion of leisure, convenience and service units than the City Centre & Fitzroy / Burleigh Street area, reflecting the role they have in serving local communities.
- Since the 2013 study, the majority of additional service & leisure unit gains have taken place in these District and Local centres which reflects a wider shift towards leisure-oriented uses across Cambridge City which is not limited to the City Centre and Fitzroy / Burleigh Street.
- While newly established District Centres such as Eddington and the Railway Station CB1 do not currently exhibit composition aligned with more well-established District Centres, including high vacancy rates at Eddington. These centres are likely to perform better in future years as the City and associated development continues to grow.
- Overall, the District and Local Centres have a good mixture of service, leisure and convenience units, with a relatively limited comparison unit offer compared to the City Centre. The District and Local Centres have walkability coverage across the City, further reflecting the role of District and Local Centres as neighbourhood hubs for easily accessible convenience and service provision.



## 7. South Cambridgeshire Rural Centres

- 7.1 South Cambridgeshire surrounds the City of Cambridge and represents a growing and changing District. The District is currently developing new towns to manage growing populations, and thus it is vital to consider the suitability of South Cambridgeshire's current and future retail and leisure provision.
- 7.2 As shown in Section 8, South Cambridgeshire is a rapidly growing, with aspirations within its Local Plan to deliver 19,500 new homes over the period 2011-31 and generate 22,000 new jobs. South Cambridgeshire has proposed a number of strategic scale allocations for housing-led development, incorporating new retail provision and supporting services. This includes strategic sites in Northstowe, Waterbeach, Bourn Airfield and Cambourne West.
- 7.3 Within the South Cambridgeshire Local Plan, villages have been divided into four different groups depending on their relative sustainability and size. These are rural centres and minor rural centres (or village centres), group villages and infill villages. For the purposes of this assessment, the focus has been on rural and minor rural (village) centres.



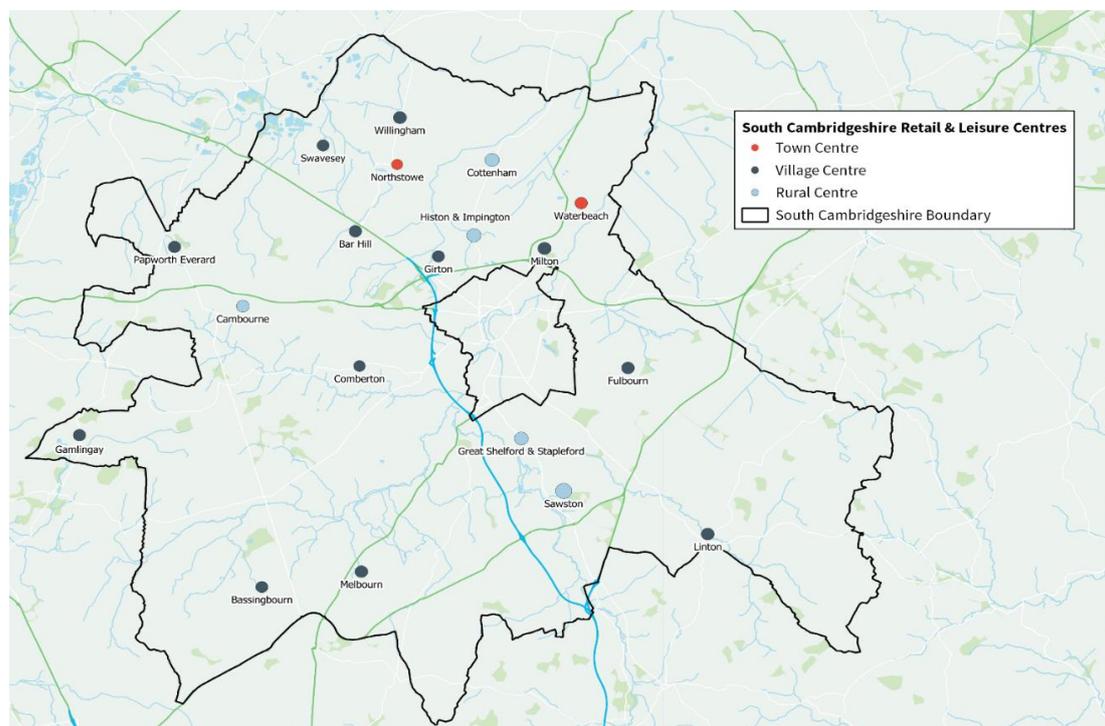
Table 7.1: South Cambridgeshire Town Centre Hierarchy

Typology	Centre	Description
<b>Rural Centres</b>	<ul style="list-style-type: none"> <li>• Cambourne</li> <li>• Cottenham</li> <li>• Great Shelford and Stapleford</li> <li>• Histon and Impington</li> <li>• Sawston</li> </ul>	Largest and most sustainable villages of the District. Have a variety of services and facilities and good public transport access to Cambridge or a market town.
<b>Minor Rural Centres</b>	<ul style="list-style-type: none"> <li>• Bar Hill</li> <li>• Bassingbourn</li> <li>• Comberton</li> <li>• Fulbourn</li> <li>• Gamlingay</li> <li>• Girton</li> <li>• Linton</li> <li>• Melbourn</li> <li>• Milton</li> <li>• Papworth Everard</li> <li>• Swavesey</li> <li>• Waterbeach</li> <li>• Willingham</li> </ul>	Have a lower level of services, facilities and employment, and often perform a role in providing services and facilities for a small rural hinterland.
<b>Group Villages</b>	34 Group Villages	Have fewer services and facilities, only meeting some of the basic day-to-day requirements for residents.
<b>Infill Villages</b>	57 Infill Villages	Have a poor range of services and facilities and it is often necessary for local residents to travel to meet most of their daily needs.

Source: South Cambridgeshire Local Plan, 2018



Figure 7.1: South Cambridgeshire Centres



Source: Hatch Regeneris, 2020. Contains OS data © Crown copyright and database right 2019

## Town Centres

7.4 The new strategic sites of Northstowe and Waterbeach are expected to deliver significant amounts of new housing (10,000 and 8,000-9,000 respectively) and are planned to be two new retail centres that will be developed in South Cambridgeshire. Given the size of their development, it is expected these will be designated as Town Centres, moving above the existing retail hierarchy for the area. At the time of writing, development in Northstowe has begun, although there is currently no retail presence on site. Waterbeach has not yet been started, however the existing village is classified as a minor rural centre and was assessed as part of the site visits for this study. Data for the existing Waterbeach village is provided in the section below.

## Rural Centres

7.5 The Rural Centres are distinguishable by their higher focus on service and convenience provision relative to the national picture. Vacancy rates are variable across the Rural Centres, ranging from a low of 5% in Histon & Impington to a high of 25% in Cambourne. Despite this, vacancy levels across the Rural Centres are below the national level (an average of 8% compared to 12% nationally), which reflects a strong performance. Sawston is currently the largest rural centre in South Cambridgeshire and also provides the highest proportion of service units (at 63% of all units).



- 7.6 High levels of vacancy in Cambourne suggest that there is either an oversupply of retail space, or that the functionality of the town centre is not working well. It is suggested that the Local Planning Authority continues to monitor the town centre’s performance and consider reducing the number or types of uses should vacancy levels continue to be at a high level.
- 7.7 Since the previous Retail Study was undertaken, there has been a noticeable shift from away from convenience and comparison retail to service and leisure uses in South Cambridgeshire’s rural centres, reflecting the trend also experienced in Cambridge City. As shown below, this trend has not been as strongly felt in South Cambridgeshire’s Minor Rural Centres, showing a change in the offer that Rural Centres have within the local area.

**Table 7.2a: South Cambridgeshire Rural Centres Composition by units, 2019**

Rural Centre	Convenience	Comparison	Service	Vacant	Leisure	Total
Sawston	6	7	37	4	5	<b>59</b>
Histon & Impington	5	4	19	2	7	<b>37</b>
Great Shelford & Stapleford	3	2	16	2	7	<b>30</b>
Cottenham	9	3	15	2	4	<b>33</b>
Cambourne	1	3	10	5	0	<b>19</b>
<b>Rural Centre Average</b>	<b>24</b>	<b>19</b>	<b>97</b>	<b>15</b>	<b>23</b>	<b>178</b>

Source: Hatch Regeneris Site Visits (November 2019). Note floorspace data is unavailable for this analysis.

Note: The high proportion of convenience space in Cottenham may in part reflect the centre’s close proximity to Northstowe, which is currently under construction and does not have any retail units open.

**Table 7.2b: South Cambridgeshire Rural Centres Composition by proportion of units, 2019**

Rural Centre	Convenience	Comparison	Service	Vacant	Leisure
Sawston	10%	12%	63%	7%	8%
Histon & Impington	14%	11%	51%	5%	19%
Great Shelford & Stapleford	10%	7%	53%	7%	23%
Cottenham	27%	9%	45%	6%	12%
Cambourne	5%	16%	53%	26%	0%



Rural Centre	Convenience	Comparison	Service	Vacant	Leisure
Rural Centre Average	13%	11%	54%	8%	13%
UK Average	9%	30%	25%	12%	24%

Source: Hatch Regeneris Site Visits (November 2019). Note floorspace data is unavailable for this analysis.

Table 7.3: South Cambridgeshire Rural Centres Change in Use, 2008-19

Rural Centre	Convenience	Comparison	Service & Leisure	Vacant
Sawston	-2	-9	12	2
Histon & Impington	-1	-11	-1	1
Great Shelford & Stapleford	-6	-9	1	1
Cottenham	-1	-1	4	2
Cambourne	0	2	-1	2
<b>Total</b>	<b>-10</b>	<b>-28</b>	<b>15</b>	<b>8</b>

Source: Hatch Regeneris Site Visits (November 2019); Cambridge Sub-Region Retail Study, 2008

### Minor Rural (Village) Centres

- 7.8 Twelve Minor Rural Centres serve the South Cambridgeshire District. In contrast to the Rural Centres, South Cambridgeshire's Minor Rural Centres consist of a much higher proportion of convenience and leisure uses. Both Fulbourn and Papworth Everard contain high proportions of comparison units at 37% and 33% respectively, meanwhile Willingham and Papworth Everard contain the highest proportions of leisure units, at 32% and 27% respectively.
- 7.9 Where the data exists, a comparison between the 2008 Retail Study and the data collected for this study has been undertaken. The results show there has not been as great a shift in the retail composition (as experienced across Rural Centres). However, there has still been a noticeable shift away from comparison retail (-9 units across all Centres) towards service and leisure uses (+7 units across all Centres).

Table 7.4a: South Cambridgeshire Minor Rural Centre Composition by unit, 2019

Minor Rural Centre	Convenience	Comparison	Service	Vacant	Leisure	Total
Milton	3	5	10	1	5	<b>24</b>
Willingham	3	1	9	2	7	<b>22</b>
Linton	5	5	6	1	4	<b>21</b>
Fulbourn	4	7	2	1	5	<b>19</b>
Melbourn	4	2	8	1	3	<b>18</b>



Minor Rural Centre	Convenience	Comparison	Service	Vacant	Leisure	Total
Gamlingay	3	3	6	0	4	<b>16</b>
Bar Hill	3	3	7	0	3	<b>16</b>
Waterbeach	3	1	7	1	4	<b>16</b>
Papworth Everard	1	5	5	0	4	<b>15</b>
Girton	1	3	5	1	3	<b>13</b>
Swavesey	2	2	4	1	2	<b>11</b>
Bassingbourn	1	1	4	1	4	<b>11</b>
Comberton	2	0	3	0	1	<b>6</b>
<b>Minor Rural Centre Average</b>	<b>35</b>	<b>38</b>	<b>76</b>	<b>10</b>	<b>49</b>	<b>208</b>

Source: Hatch Regeneris Site Visits (November 2019)

Table 7.4b: South Cambridgeshire Minor Rural Centre Composition by proportion of units, 2019

Minor Rural Centre	Convenience	Comparison	Service	Vacant	Leisure
Milton	13%	21%	42%	4%	21%
Willingham	14%	5%	41%	9%	32%
Linton	24%	24%	29%	5%	19%
Fulbourn	21%	37%	11%	5%	26%
Melbourn	22%	11%	44%	6%	17%
Gamlingay	19%	19%	38%	0%	25%
Bar Hill	19%	19%	44%	0%	19%
Waterbeach	19%	6%	44%	6%	25%
Papworth Everard	7%	33%	33%	0%	27%
Girton	8%	23%	38%	8%	23%
Swavesey	18%	18%	36%	9%	18%
Bassingbourn	9%	9%	36%	9%	36%
Comberton	33%	0%	50%	0%	17%
<b>Minor Rural Centre Average</b>	<b>17%</b>	<b>18%</b>	<b>37%</b>	<b>5%</b>	<b>24%</b>
UK Average	9%	30%	25%	12%	24%

Source: Hatch Regeneris Site Visits (November 2019)



Table 7.5: South Cambridgeshire Minor Rural Centre Composition Change 2008-19, (where possible)

Minor Rural Centre	Convenience	Comparison	Service & Leisure	Vacant
Willingham	-1	-10	9	2
Linton	1	-1	-4	1
Fulbourn	0	-1	-2	-2
Melbourn	0	0	-3	1
Gamlingay	-1	1	0	0
Bar Hill	1	-1	1	0
Papworth Everard	0	3	5	-1
Waterbeach	-1	0	1	1
<b>Total</b>	<b>-1</b>	<b>-9</b>	<b>7</b>	<b>2</b>

Source: Hatch Regeneris Site Visits (November 2019); Cambridge Sub-Region Retail Study, 2008

## Summary

- South Cambridgeshire is a rapidly developing District, with major development expected to take place across the area over the next decade. The development of new towns in Northstowe and Waterbeach will redefine the area’s retail hierarchy, with these centres becoming town centres in their own right.
- The area’s Rural and Minor Rural Centres have a much stronger presence of convenience and service uses compared to the national picture, reflecting the role they have in serving local populations. There is generally a low presence of comparison retail, reflecting the role that Cambridge City Centre has in serving these communities for that type of retail.
- Reflecting a trend also experienced in Cambridge City, there has been a shift away from comparison retail units in South Cambridgeshire towards service and leisure uses. This reflects the changing dynamic of the retail sector, and the consolidation of comparison shops in retail parks / out-of-town shopping centres.



## 8. Strategic Sites

- 8.1 Significant levels of planned development is coming forward on allocated sites over the plan period. Delivery is at varying levels of implementation from planned, to under construction, to completed; with many sites including retail and/or local and district centres to support the growth of sustainable new settlements.
- 8.2 It is relevant in this section to understand the location, scale and pace of change in advance of considering the need for additional new retail and town centre floorspace – and associated implementation strategy – in later sections. The sites below are located across both Cambridge City and South Cambridgeshire District administrative areas, with many straddling the shared boundary.

### Grafton Centre, Fitzroy Street, Area of Major Change

- 8.3 On 1<sup>st</sup> September 2020, Cambridge City Council granted planning permission for development at the Grafton shopping centre located within Cambridge city centre historic core (Ref: 19/0512/FUL):

Redevelopment of existing bus turning head and redundant service area to provide new hotel and ancillary restaurant (Use Class C1), new public realm (urban park) and landscape improvements together with associated highway works to East Road providing new bus stops, pedestrian and cycle routes.

- 8.4 The application site lies on the northern edge of East Road and forms part of the Grafton Shopping Centre. The site lies adjacent to the Vue cinema at the eastern end of the shopping centre, and comprises the existing bus turning head and redundant service yard which served the former BHS unit. In terms of **'town centre' uses**, the permitted scheme includes an 8-storey, 153 bedroom hotel and a ground floor restaurant.
- 8.5 Permitted highways works to improve East Road are in line with the aspirations of the Grafton Area SPD, and include on-road bus stops on both northbound and southbound, a pedestrian crossing, segregated off-road cycle lane on both sides of the road and removal of the central reservation.

### Cambridge Bio-Medical Campus, Area of Major Change

- 8.6 In October 2009, Cambridge City Council and South Cambridgeshire District Council granted outline planning consent for a range of uses as part of the 'Cambridge Biomedical Campus (CBC) (including Addenbrookes Hospital) Area of Major Change' (Ref: 06/0796/OUT). The proposed scheme allowed for the extension to the south and west of the existing CBC.
- 8.7 The site, located entirely within Cambridge City administrative area, was released from the Green Belt in the previous Cambridge Local Plan 2006. This outline application sought planning permission for the construction of 215,000 sq m of



- floorspace to extend the CBC in accordance with the '2020 Vision' – 'a future in which the campus becomes an international centre of excellence, supporting the growth of scientific understanding, the discovery of new medical techniques, the education of healthcare staff, economic growth and improved access'.
- 8.8 Outline planning permission focused specifically on development to include clinical research and treatment, clinical in-patient treatment and biomedical and biotech research and development with ancillary 'related support activities' within use class A1, A3, B1, D1 (creche/nurseries) or sui generis uses. Condition 10 of the outline planning permission (ref: 06/0796/OUT) confirmed that these ancillary uses should not individually exceed 500 sq m gross floorspace.
- 8.9 A number of reserved matters applications have subsequently been permitted. The MRC Laboratory of Molecular Biology subsequently opened in 2013, and the new Royal Papworth Hospital opened in 2019. Development is now under construction for AstraZeneca's New Cambridge Site (NCS). Their Research and Development building and Corporate Headquarters is nearing completion on the 'north' plot, and their Energy Centre on the 'south' plot has been completed.
- 8.10 More recently, responding to the changing requirements of AstraZeneca, reserved matters were approved for the remainder of their 'south' plot to include:
- An R&D Enabling Building 13,197 sq m;
  - An Amenities Hub of 3,261 sq m;
  - Multi storey car park; and
  - Temporary multi-use games area.
- 8.11 In terms of '**town centre uses**', the amenities hub comprises a three storey building providing a range of facilities for AstraZeneca staff, ancillary to the primary biomedical and biotechnology R&D use. These include a wellbeing hub and changing facilities for cyclists etc, wellness suite and amenity space such as the café and market, and Wellbeing Garden. A gym, spin studio and multi-purpose studio will be provided on the first floor, including changing facilities, as well as a multi-faith room, café break-out area and staff hub; and a creche will be created on the second floor.
- 8.12 The Cambridge Bio-Medical Campus highlights significant investment in Greater Cambridge in the pharmaceutical, health and medical research and development sectors. Whilst not creating a new town or local centre or destination retailing, the area is growing in terms of employees and workforce, contributing to population growth in the southern fringe area.

#### **Southern Fringe, Area of Major Change (Area Action Plan)**

- 8.13 A sustainable new urban extension to Cambridge is nearing completion at the Cambridge Southern Fringe, crossing the South Cambridgeshire / Cambridge City boundary. Four sites including **Clay Farm**, **Trumpington Meadows**, **Bell School** and **Glebe Farm** sit within Cambridge City authority, whilst the southern



fringe area in South Cambridgeshire comprises Trumpington West and land South of Addenbrookes.

- 8.14 Much of the urban development is located in Cambridge City Council (including the Cambridge Bio-Medical Campus), and whilst Trumpington West in South Cambridgeshire will comprise approximately 600 dwellings and small-scale B1 employment in South Cambridgeshire, large swathes of Trumpington West will comprise a country park, green belt and landscaped site edging. The entire area south of Addenbrooke's is the focus of countryside enhancement strategies and new cycle and footpaths.
- 8.15 The relevant sites in respect of retail and town centre uses are Trumpington Meadows and Clay Farm, which both accommodate new Local Centres. **Glebe Farm** is now complete, comprising almost 300 new homes and 1.4 hectares of public open space including allotments. **Bells School** is under construction, and will comprise 270 new homes, 100 bed student accommodation, and open space/allotments. We set out the composition of each site below, with a focus on the committed level of retail and town centre floorspace.
- 8.16 **Trumpington Meadows:** In October 2009, planning permission was granted for development at Trumpington Meadows, with the main features including 1,200 homes split between the Cambridge City/South Cambridgeshire boundary, an enhanced primary school, Local Centre and country park:
- “Demolition of existing buildings and structures, redevelopment for approximately 600 dwellings. And for a Primary School, Recreation/Leisure Uses including change of use from agriculture to public open space, community and other local facilities with associated parking, infrastructure and earthworks”.
- (Ref:  
S/0054/08/O)
- 8.17 In January 2017, reserved matters application reference Ref: S/2647/16/RM was granted planning permission in respect of details relating to the Local Centre. The submission material and decision confirmed that the Local Centre will incorporate three retail units to be located at ground floor level within the South Block only. The retail accommodation “will comprise 450 sq m gross of floorspace at ground floor level, within the South Block. This will include one ‘anchor store’ (310 sq m gross) and two smaller units (80 and 60 sq m gross)”.
- 8.18 The Local Centre is now built and is occupied by Sainsbury's Local, which is open and trading. Much of the residential is now completed, with the remaining blocks under construction.
- 8.19 **Clay Farm:** Clay Farm benefits from an outline planning permission (07/0620/OUT) granted on the 6th August 2010, with the main features including up to 2,300 new homes, new secondary and primary school, community sport, recreation facilities and shops:



Residential development of up to 2,300 new mixed-tenure dwellings and accompanying provision of community facilities; sports and recreation facilities and landscaped open spaces including 49 ha. of public open space in the green corridor, **retail (A1), food and drink uses (A3, A4, A5), financial and professional services (A2), non-residential institutions (D1), a nursery (D1), alternative health treatments (D1)**; provision for education facilities; and all related infrastructure including: all roads and associated infrastructure, alternative locations for Cambridgeshire guided bus stops, alternative location for CGB Landscape Ecological Mitigation Area, attenuation ponds including alternative location for Addenbrookes's Access Road pond, cycleways, footways and crossings of Hobson's Brook.

8.20 Attached to the planning permission are the following relevant retail/town centre planning conditions:

- **Condition 28** – Prior to or concurrently with the submission of any application for reserved matters approval for the Local Centre, the distribution and size of all A1, A2, A3, A4, A5 and D1 units shall be submitted to and approved in writing by the Local Planning Authority. The units shall accord with the mix and balance of uses as specified in the schedule of uses shown on page 20 of the amended Design and Access Statement dated Dec 2007. The local centre shall be completed in accordance with the approved size, mix and distribution. **Reason:** To ensure that the local centre provides an appropriate range of facilities and services required by the development (Cambridge Local Plan policies 6/7, 9/3 and 9/5).
- **Condition 29** – There shall be no amalgamation of the A1, A2, A3, A4, A5 or D1 units that comprise the Local Centre. **Reason:** To ensure that the local centre provides an appropriate range of facilities and services required by the development (Cambridge Local Plan policies 6/7, 9/3 and 9/5).

8.21 In November 2014, reserved matters application reference 14/1201/REM was approved in respect of Condition 28. The Local Centre was confirmed to be located centrally within the development, facing the community centre and community space; with the Committee Report confirming the following mix of unit/floorspace areas:

- A1 retail: 1 local supermarket: 500 sq m GEA;
- A1 retail: 1 unit x 200 sq m / 1 unit x 150 sq m / 2 x 100 sq m (550 sq m GEA);
- A2 financial / professional services: 2 units x 120 sq m (240 sq m GEA);
- A3 Restaurant/café: 1 unit x 200 sq m (200 sq m GEA);
- A4 Drinking establishment 1 unit x 450 sq m (450 sq m GEA);
- A5 Takeaway: 3 unit x 120 sq m (360 sq m GEA);
- **TOTAL: 12 units (2,300 sq m GEA)**
  
- D1 Nursery: 1 x 600 sq m (600 sq m GEA)



- D1/sui generic alternative health treatment: 1 x 150 sq m (150 sq m GEA)
- **Grand Total 14 units (3,050 sq m GEA)**

8.22 The planned intention was that the local centre would primarily be serving the new population within the proposed 2,300 dwellings, who would easily be able to walk or cycle to the centre. The type of retail units envisaged include pharmacy, garden/florist, hair/beauty, dry cleaners and shoe repairs, for example. The Local Centre – now known as ‘Hobson Square’ – has since been developed and is open for trading, with Nisa occupying the main anchor unit in early 2020.

#### North East Cambridge (NEC), Area of Major Change (Draft Area Action Plan)

8.23 North East Cambridge is in the early stages of planning, being allocated as a strategic site and Area of Major Change in both Local Plans. A Draft Area Action Plan has been prepared jointly between Cambridge City Council and South Cambridgeshire District Council, with the vision being an inclusive, walkable, low-carbon new city district with a lively mix of homes, workplaces, services and social spaces, fully integrated with surrounding neighbourhoods.

8.24 Four new town centres are planned within North East Cambridge to create active, lively focal points for new and existing residents and workers. The intention is for these to include shops, places to eat and drink, and community facilities. Two centres will be located at the edge of the Area Action Plan area, where they will help to serve and integrate new and existing communities around Cambridge North Station, and on the edge of the Cambridge Science Park near Cambridge Regional College. Another local centre will be created near St John’s Innovation Park, and the larger district centre – with shops and restaurants, community and cultural facilities – will be located centrally to the main area of new development.

8.25 North East Cambridge will provide a balanced range of shops and services such as cafés, restaurants, and leisure activities to meet the daily needs of local residents, employees and visitors. The intention is not to create a ‘destination’ location for people living further afield which would increase car trips into the area. Policy 15 identifies 7,300 sq m gross of retail and town centre uses across the four centres, to include 2,650 sq m of convenience goods, 2,475 sq m of comparison goods, and 2,175 sq m of ‘other town centre uses’. Included within the convenience floorspace, the policy supports the provision of a small to medium sized foodstore.

#### North West Cambridge, Strategic Site (Area Action Plan)

8.26 Located on the Cambridge City and South Cambridgeshire boundary, the site is the subject of the jointly prepared Cambridge North West Area Action Plan (see Section 2). The Joint Development Control Committee (JDCC) resolved to grant approval of the outline planning applications (11/1114/OUT and S/1886/11) on 8th August 2012 subject to the completion of the S106 agreement, which was signed on 22nd February 2013. This consent has subsequently been



superseded by the Section 73 consent (under references S/2036/13NC and 13/1402/S73) for the following:

“Up to 3,000 dwellings; up to 2,000 student bedspaces; 100,000 sq.m. employment floorspace, of which: up to 40,000 sq.m. commercial floorspace (Class B1(b) and sui generis research uses) and at least 60,000 sq.m. academic floorspace (Class 01); **up to 5,300 sq.m. gross retail floorspace (Use Classes A 1 to AS) (of which the Foodstore is 2,000 sq.m. net floorspace)**; Senior Living, up to 6,500sq.m. (Class C2); Community Centre; Indoor Sports Provision; Police; Primary Health Care; Primary School; Nurseries (Class 01); Hotel (130 rooms); Energy Centre; and associated infrastructure including roads (including adaptations to Madingley Rd and Huntingdon Rd), pedestrian, cycle and vehicle routes, parking, drainage, open spaces and earthworks.”

8.27 In February 2014, reserved matters application Reference: 13/1748/RM was approved

“Reserved matters application (access, appearance, landscaping, layout and scale) pursuant to 13/1402/S73 for **a foodstore (2,000sqm net, Use class A1) and retail space (use class A1- A4)**, 117 residential units, comprising 41 one bedroom key worker units and 76 two bedroom key worker units, a primary health care centre (Use class D1), a police office (Use class B1), a district heating energy centre, access roads, including bollard controlled street running through the local centre (with cycle and pedestrian routes), cycle parking, car parking, landscaping, public realm, utilities and associated ancillary structures.

8.28 The foodstore and small retail unit were planned to front onto the market square. A sales area of 2,000 sqm was proposed for the foodstore offering the sale of up to 10 % of comparison goods and 175 sqm GIA was proposed for the retail unit. The permission included conditions covering the following key areas:

- The retail space (175 sq m GIA) to remain independent from the main foodstore (2,000 sq m net);
- Restricting the main foodstore to ‘foodstore’ use only;
- Controlling the net floorspace of the main foodstore to 90% convenience, 10% comparison goods.

8.29 The medium sized foodstore opened in September 2017 as one of the first phases of the strategic residential growth area. It is now occupied by Sainsbury’s offering the Argos brand. The wider area and following phases of development remain under construction, with the first phases of housing completed and occupied.



### Cambridge East, Strategic Site (Area Action Plan)

- 8.30 Cambridge East is located across the administration areas of both Cambridge City and South Cambridgeshire District, and is the subject of Local Plan site allocations R41, R47 and SS/3. The Area Action Plan (2008) is discussed in Section 2, and sets out the vision for a new urban quarter on the site of Marshall's Airport, accommodating up to 12,000 new homes. The AAP confirms the introduction of a large district centre and smaller local centres as a focus for new communities.
- 8.31 In December 2020, outline planning permission was granted for a parcel of land within the southern part of the AAP boundary, a site comprising 55.93 hectares of vacant, open space and agricultural land (Ref: 18/0481/OUT):
- “Outline planning application (all matters reserved except for means of access in respect of junction arrangements onto Coldhams Lane, Cherry Hinton Road and Airport Way) for a maximum of 1,200 residential dwellings (including retirement living facility (within Use Class C2/C3)), **a local centre comprising uses within Use Class A1/A2/A3/A4/A5/B1a/D1/D2**, primary and secondary schools, community facilities, open spaces, allotments, landscaping and associated infrastructure.”
- 8.32 The mixed use residential led scheme will provide:
- Up to a maximum of 1,200 dwellings (Class C3).
  - Retirement living facility: up to 90 bed spaces (Class C2/C3 within 1,200 above).
  - **Local centre: up to 1,850 sq m gross floorspace (Use Class A1/A2/A3/A4/A5/B1a/D1/D2 flexible units – of which a food store will not be more than 500 sq m).**
  - Community hall (Class D2): up to 250 sq m (within 1,850 sq m gross above).
  - Primary School 2FE.
  - Secondary School 6FE.
- 8.33 Condition 1 of the planning permission confirms that the flexible mixed-use units (Classes A1/ A2/ A3/ A4/ A5/ B1a/ D1/ D2 within local centre) will comprise no more than 1,850 sq m gross internal floorspace. This includes a foodstore (A1) up to 500 sq m gross internal floorspace, a community hall up to 250 sq m gross, and other non-residential institutions, community, leisure and education within Use Class D1/D2.
- 8.34 Supporting material explains that the local centre will comprise a mix of uses designed to offer flexibility at outline stage, with a view to serving the local needs of the development and to meet market demands to ensure that the local centre uses are viable in the long-term. The planning statement emphasises that the commercial units will meet the needs of the future population whilst



complementing the facilities already available within Cherry Hinton – rather than competing with them.

- 8.35 The local centre includes provision for community facilities, which could include a new community hub (for example, a hall, meeting space, children’s play space and potential café) and a health centre subject to there being a demonstrable need. Details of provision, management and use will be determined at reserved matters stage taking account of local views and confirmed identified need.
- 8.36 The local centre will accommodate a range of potential uses (within Use Classes A1/ A2/ A3/ A4/ A5/ B1a/ D1/ D2). The local centre could comprise a number of small local shops, community facilities (new community hub, meeting space, café) a children’s nursery, and healthcare, although the nature of the final provision of social infrastructure will be determined through s.106 discussions and delivered at Reserved Matters stage reflecting need and practical viability.
- 8.37 Cambridge East currently has **committed retail/town centre floorspace of 1,850 sq m gross**, to include A1/ A2/ A3/ A4/ A5/ B1a/ D1/ D2, with a newly defined ‘Local Centre’. The permission has not yet been implemented. There are no further planning applications or planning permissions across the remainder of the AAP area. Policy does encourage the introduction of further district and local centres to serve the 10-11,000 planned additional new homes within the AAP area.

#### West Cambridge, Area of Major Change

- 8.38 Located entirely within Cambridge City administrative area, West Cambridge is the subject of Local Plan site allocation M13 – an Area of Major Change. The University of Cambridge submitted a planning application on 16<sup>th</sup> June 2016 (Ref: 16/1134/OUT) for:
- “up to 383,300m<sup>2</sup> of development comprising up to 370,000m<sup>2</sup> of academic floorspace (Class D1 space), commercial/research institute floorspace (Class B1b and sui generis research uses), of which not more than 170,000m<sup>2</sup> will be commercial floorspace (Class B1b); up to 2,500m<sup>2</sup> nursery floorspace (Class D1); **up to 1,000m<sup>2</sup> of retail/food and drink floorspace (Classes A1-A5)**; up to 4,100m<sup>2</sup> and not less than 3,000m<sup>2</sup> for assembly and leisure floorspace (Class D2); up to 5,700m<sup>2</sup> of sui generis uses, including Energy Centre and Data Centre; associated infrastructure including roads (including adaptations to highway junctions on Madingley Road), pedestrian, cycle and vehicle routes, parking, drainage, open spaces, landscaping and earthworks; and demolition of existing buildings and breaking up of hardstanding.”
- 8.39 In October 2017, a Supplementary Planning Application was submitted which made a number of refinements to the scheme submitted through the original planning application. The key land use change was the **increase of retail/food and drink floorspace (Classes A1-A5) from 1,000 sq m to 4,000 sq m**. The



planning application remains undetermined. A further Supplementary Planning Application was submitted in late 2020, but this did not include any further changes to the proposed level of retail/food and drink floorspace.

### Darwin Green, Land Between Huntingdon Road and Histon Road

- 8.40 This site is located to the north west of Cambridge City Centre, and includes the full extent of Cambridge City Council site allocation R43, and a small part of South Cambridgeshire District Council site allocation SS/2 to enable access from Histon Road. The remainder of strategic site allocation SS/2 is currently undeveloped with no associated planning permission or planning application to date.
- 8.41 In July 2010, the Cambridge Fringes Joint Development Control Committee resolved that land between Huntingdon Road and Histon Road be granted outline planning permission (Ref: C/07/0003/OUT) subject to the signing of a Section 106 Agreement. A decision notice was subsequently issued by Cambridge City Council on 18<sup>th</sup> December 2013 for the main part of the site falling within the city administrative boundary:
- “Mixed use development comprising up to 1,593 dwellings, primary school, community facilities, **retail units (use classes A1, A2, A3, A4 and A5)** and associated infrastructure including vehicular, pedestrian and cycleway accesses, open space and drainage works.”
- 8.42 The supporting Planning Statement Addendum (December 2008) confirmed all land uses, including up to 40ha of housing (1,593 dwellings), a combined primary school and community hall, a retail foodstore of approximately 1,200 sq m, and up to six retail/service units of approximately 100 sq m each.
- 8.43 At the same time, on December 18<sup>th</sup> 2013, planning permission was obtained from South Cambridgeshire District Council (Ref: S/0001/07/F) for a small parcel of land within strategic site allocation SS/2, to the north east end of the site, for access onto Histon Road. Subsequent reserved matters planning applications have been approved relating to access, infrastructure, schools and residential phasing parcels, and in May 2016 approval of reserved matters in respect of the Darwin Green Local Centre was granted by Cambridge City Council:
- “Reserved matters for 114 residential units and local centre to include library, community rooms, health centre and retail units pursuant to outline consent 07/0003/OUT at Darwin Green One.” **(Ref: 15/1670/RM)**
- 8.44 The Planning Statement (March 2016) supporting the approved reserved matters application confirmed the total floorspace for the permitted Local Centre uses, to include the library (350 sq m), health centre (710 sq m), community rooms (200 sq m) and retail (500 sq m). This is alongside the supermarket approved in the original outline planning permission. Committed retail floorspace at Darwin Green is 1,700 sq m gross.



- 8.45 Within the original outline planning application, consideration was given to how the local centre might evolve should adjoining land to the north, in South Cambridgeshire District Council (site allocation SS/2), also come forward for development. To enable this scenario in the future, the size of the local centre was increased by 0.5ha to allow flexibility for an increase in the size of the local centre should this be necessary, and in the alternative for this 0.5ha to be used for residential purposes.
- 8.46 The Local Centre is located on the boundary between the two sites (SS/2 and R43). Darwin Green is in the early phases of development; only Phase 1 of 4 phases has commenced. The retail/town centre floorspace has not yet been implemented.

#### Station Areas West and Clifton Road, Area of Major Change

- 8.47 The Station Areas are located entirely within Cambridge City administrative area, adjoining the mainline railway station. In April 2010 outline planning permission was granted for the comprehensive redevelopment of the Station Road area, to include residential, student accommodation, offices and retail/leisure uses (Ref: 08/0266/OUT):

‘The comprehensive redevelopment of the Station Road area, comprising up to 331 residential units (inclusive of 40% affordable homes), 1,250 student units; 53,294 sq m of Class B1a (Office) floorspace; **5,255 sq m of Classes A1 /A3/A4 and/or A5 (retail) floorspace**; a 7,645 sq.m polyclinic; 86 sq.m of D1 (art workshop) floorspace; 46 sq m D1 (community room); 1,753 sq m of D1 and/or D2 (gym, nursery, student/community facilities) floorspace; use of block G2 (854 sq.m) as either residential student or doctors surgery, and a 6,479 sq.m hotel; along with a new transport interchange and station square, including 28 taxi bays and 9 bus stops (2 of which are double stops providing 11 bays in total), a new multi storey cycle and car park including accommodation for c. 2,812 cycle spaces, 52 motorcycle spaces and 632 car parking spaces; highway works including improvements to the existing Hills Road / Brooklands Avenue junction and the Hills Road / Station Road junction and other highway improvements, along with an improved pedestrian / cyclist connection with the Carter Bridge; and works to create new and improved private and public spaces.’

- 8.48 Condition 15 confirmed that A1, A3, A4 and A5 floorspace permitted within the site shall not exceed an overall gross external floor area of 5,255 sq m so as not to have an adverse impact on existing local centres. The scheme has since been **implemented and opened for trading** towards the end of 2016. Businesses include Café Nero, Wasabi, Pret a Manger, Sainsbury’s Local, M&S Simply Food, Chill #2 within the Ibis Hotel, Rutland Cycle Shop and Station Tavern.



### Orchard Park, Strategic Site

8.49 Orchard Park is at an advanced stage of development, having been granted planning permission in June 2005 (Ref: S/2379/01/O). The site (Local Plan allocation SS/1) is located entirely within South Cambridgeshire District Council, but adjoining the boundary with Cambridge City Council; it is directly north of Cambridge City Centre. Planning permission was granted for the following scheme:

“a mixed use development comprising 900 dwellings (on up to 16.48 hectares), up to 18,000 sq m B1 gross floorspace (on up to 3.32 hectares), up to 1.21 hectares of education facilities, 4.86 hectares of open space, **up to 0.56 hectares of local centre facilities (A1, A2, A3, A4, A5 and D1 uses)**, up to 2.07 hectares of public transport infrastructure corridor and mixed uses on up to 2.87 hectares in five areas to include B1, C1, C2, C3, D1, D2 uses and car showroom.”

8.50 The supporting material and decision notice sought to control the land uses to ensure the delivery of an appropriate Local Centre to serve the new community. Condition 27 stated that the Local Centre should not exceed 0.56 hectares, and be in the location as detailed in the supporting material; and Condition 29 restricts the amalgamation of any units to ensure unit size is appropriate to its function as a Local Centre.

8.51 The wider development is almost complete and occupied, and the Local Centre is open and trading, with businesses including Pizza Hut, a Barbers hair salon, a good sized One Stop convenience store, take-away and charity shop.

### Northstowe (Survey Zone 8), New Settlement Strategic Site (Area Action Plan)

8.52 Northstowe is the focus of an Area Action Plan, discussed in Section 2 of this report. Located entirely within South Cambridgeshire District Council, Northstowe forms New Settlement Strategic Site SS/5. When complete, the new strategic settlement of Northstowe will have around 10,000 homes, a population of almost 25,000 people, and a small network of town and local centres. The **Phase 1** planning permission (Ref: S/0388/12/OL) included 1,500 new homes and a mixed-use local centre to provide for the day-to-day needs of the local population.

8.53 The local centre has permission to include **1,500 sq m net of retail, plus a further 450 sq m net for other commercial uses retail / leisure / food and drink / community / health and other appropriate uses**, albeit there are no conditions fixing the floorspace of specific town centre land uses within the centre. Many of the new homes are now built and occupied, with the first residents moving in in 2017. The new Local Centre has not yet been built, and is due to come forward in the next 1-2 years.

8.54 **Phase 2** Northstowe was granted planning permission in January 2017 (Ref: S/2011/14), and includes 3,500 homes, schools, sports hubs, public open



spaces, and a new town centre. Section 4 of the planning statement sets out the following town centre floorspace which totals 57,500 sq m of town centre uses (Use Class A1/A2/A3/A4/A5/D1 and D2), and 21,200 sq m of employment uses (Use Class B1):

▪ Convenience retail:	10,000 sq m
▪ Comparison/Service retail:	25,000 sq m
▪ B1 Employment:	21,200 sq m
▪ Food and Drink:	3,500 sq m
▪ Leisure:	10,000 sq m
▪ Health, Community, Fitness Centre:	6,000 sq m
▪ Youth Facility:	2,000 sq m
▪ Place of Worship:	1,000 sq m

- 8.55 The planning permission does not fix the floorspace of specific town centre uses (including B1 employment), but Condition 14 of planning permission S/2011/14, states that “an updated Town Centre Strategy to provide more detail on the layout and distribution of activities and enable the early delivery of the town centre shall be submitted to and approved in writing by the Local Planning Authority”. This condition was subsequently discharged (Ref: S/2423/19/DC) in June 2020 in the context of a new and up-to-date Town Centre Strategy dated March 2020.
- 8.56 The strategy confirms that the new town centre will serve the 25,000 people living in Northstowe, residents in surrounding villages and a diverse range of workers and visitors. It recognises the structural changes that have and continue to occur in the retail and leisure sector, setting a very different context for delivering a new town centre, and highlighting the importance of responding to emerging trends through flexibility.
- 8.57 The Town Centre Strategy consequently proposes **a substantially reduced level of retail space** than is allowed for under the Phase 2 Outline Planning Permission. A retail floorspace reduction from 35,000 sq m net to a minimum of 7,375 sq m net and a **maximum of 12,000 sq m net** is confirmed; whilst ‘food, drink and leisure uses’ and the ‘civic hub and community uses’ remain the same at 13,500 sq m net and 9,000 sq m net respectively. Use Class B1 employment is recorded in the new and up-to-date Town Centre Strategy as being 16,200 sq m net.
- 8.58 Planning applications have since been submitted for the final phases (3a and 3b) of Northstowe new town. Northstowe **Phase 3a** proposes up to 4,000 new homes, a local centre and two new primary schools on land at the southern end of Northstowe (Ref: 20/02171/OUT). The local centre will include a convenience foodstore (615 sq m), local shops and services (2,530 sq m), and employment B1 (5,882 sq m) floorspace. The space identified for local shops and services in the Local Centre will include a flexible space for community use, including group meetings and events.



- 8.59 In addition to the Local Centre, a series of ‘secondary mixed-use zones’ are proposed where there will be opportunities to use ground floor space for employment, community, retail and associated services, food and drink, leisure or residential uses, to allow for the organic growth of more commercial space as the town grows. The total potential capacity for these uses at ground floor in the secondary zones is 13,300sqm.
- 8.60 Northstowe **Phase 3b** is a proposal for up to 1,000 new homes and a primary school at the northern end of Northstowe (Ref: 20/02142/OUT). No new town centre is proposed, with Phase 3b residents being located within a 10 minute walk of the Phase 1 Local Centre. Instead, a “Secondary Mixed Use Zone” is proposed where there will be opportunities to use ground floor space for retail and associated services, food and drink, community, leisure, employment and residential uses, responding to the needs of the local community as it evolves. The total capacity of the ground floor space in the secondary zone is 1,320sqm (GIA).

#### Waterbeach, New Settlement Strategic Site

- 8.61 Waterbeach New Town site is located entirely within South Cambridgeshire District Council, to the north east of Cambridge City Centre; and is the subject of Local Plan Site Allocation SS/6 – a ‘New Settlement Strategic Site’. The development of Waterbeach New Town is being advanced by two parties; The Ministry of Defence is being represented by Urban & Civic in respect of the former Army Barracks, whilst RLW are representing the land owners adjoining the former Army Barracks in the eastern part of the site.
- 8.62 As a whole, the site is anticipated to provide up to 11,000 dwellings and will be supported by a range of commercial and social infrastructure uses to create a sustainable new settlement. It is estimated that the development will take around 20 years to complete.
- 8.63 In September 2019, the Ministry of Defence was granted outline planning permission for up to 6,500 dwellings on the site of the former Army Barracks and surrounding land in Waterbeach: Waterbeach New Town (West) (Ref: S/0559/17/OL):
- “up to 6,500 dwellings (including up to 600 residential institutional units), business, retail, community, leisure and sports uses; a hotel; new primary and secondary schools; green open spaces including parks, ecological areas and woodlands; principal new accesses from the A10 and other points of access; associated infrastructure, groundworks and demolition; with all matters reserved except for the first primary junction from the A10.”
- 8.64 The site has an area of 293 hectares and comprises the western portion of Waterbeach New Town. In respect of retail and leisure uses, the supporting



Town Centre Uses Assessment and subsequent planning permission sets out the following mix (which remains unimplemented):

- Retail and Leisure – 16,500 sq m gross of retail and leisure floor (Class A1 shops, A2 financial/professional services, A3 food and drink, A4 drinking establishments and A5 hot food takeaways). No single outlet will be larger than 4,000 sq m. The supporting appendices suggest there will be 2 foodstores across a district and local centre;
- Assembly and Leisure – up to 7,000 sq m for health and fitness, gym and other cultural and recreational uses (Class D2);
- Hotel accommodation – up to 4,000 sq m (Class C1).

8.65 In May 2018, RLW submitted a planning application for the adjoining site – Waterbeach New Town (East) (Ref: S/2075/18/L):

“Outline planning permission (with all matters reserved) is sought for development of up to 4,500 dwellings, business, retail, community, leisure and sports uses; new primary and secondary schools and sixth form centre; public open spaces including parks and ecological areas; points of access, associated drainage and other infrastructure, groundworks and landscaping.”

8.66 The Waterbeach New Town East site is proposed to provide up to 9,000 sq m gross of ‘A’ Class floorspace as follows:

- Convenience retail: up to 3,500 sq m gross;
- Comparison retail: up to 3,000 sq m gross;
- Other Use Class A: up to 2,500 sq m gross.

8.67 The supporting documentation explains that the level of A Class uses that can be supported are anticipated to be split across a District Centre and a Local Centre, with the District Centre located around the train station and the Local Centre in the northern part of the Waterbeach New Town East site. The applicant envisages both centres to be anchored by a supermarket/convenience store. This planning application (Ref: S/2075/18/L) remains undetermined.

### **Bourne Airfield, New Settlement Strategic Site**

8.68 Bourne Airfield, now largely disused, is located entirely within South Cambridgeshire District, to the west of Cambridge City Centre on the A428. The wider site is subject to Local Plan site allocation SS/7 (as noted in Section 2 of this report), and planning permission was recently granted for a parcel of land – the former Gestamp Plant – within the site allocation comprising 10.1 hectares of previously developed land:

Hybrid planning application consisting of full planning permission for Phase 1 and outline planning permission with all matters reserved except access for Phase 2 of the redevelopment of the former Gestamp Factory site at Bourn Airfield for up to 26,757sqm/288,000sqft of commercial floorspace purposes (use class B1c light industry, B1b research and



development and B8 warehouse and distribution with supplementary use classes A3 restaurant and cafe, D1 day nursery/creche, D2 gym), associated car parking and service yards, external earthworks, attenuation basins and landscaping. [Ref: 20/02568/FUL, planning permission 14<sup>th</sup> January 2021]

- 8.69 Located immediately adjoining the site to the west is a further employment site; and the proposed Bourn New Village, surrounds both parcels of employment land. The planned new settlement is expected to accommodate up to 3,500 new homes, but no planning application has yet been submitted. In respect of the permitted scheme site, the former Gestamp Plant buildings were demolished in 2013 under the extant permission (S/1020/13/FL), and the site has since been cleared to ground level with only hardstanding remaining.
- 8.70 The permitted scheme is predominantly commercial industrial and warehouse, with Phase 1 providing 15 units of varying size, adding up to a total of 16,074 square metres. Phase 1 would also provide 'supplementary' uses for A3 – restaurant and café, D1 – day nursery/creche and D2 – gym; but the specific use of each unit, or floorspace of the A3 space, is not specified. Condition 14 confirms that no units/floorspace within either Phase 1 or Phase 2 of the development shall be used for the purpose of retail, in order to safeguard the vitality and viability of the 'planned' new local centre within Bourn New Village identified as part of strategic site (SS/7).
- 8.71 The planning permission will provide supplementary A3 floorspace specified as a restaurant or café, but will not offer wider retail uses. A new Local Centre as part of the Bourn New Village remains planned but not yet implemented or permitted through planning.

#### Cambourne West, Sustainable Village Strategic Site

- 8.72 Cambourne West is located entirely within South Cambridgeshire District, to the west of Cambridge City Centre on the A428 corridor. The subject of Local Plan site allocation SS/8, the site is identified as a sustainable village strategic site with the planned intention to provide a fourth linked village to Cambourne of approximately 1,200 dwellings by 2031. Outline planning permission (Ref S/2903/14/OL) was granted on 27th December 2017 for the following development:

“..up to **2,350 residential units** including affordable housing; **retail, use classes A1-A5 (up to 1.04 ha)**; offices/light industry, use class B1 (up to 6.25ha); community and leisure facilities, use class D1 and D2 (up to 1.3 ha); two primary schools and one secondary school (up to 11 ha), use class D1; three vehicular access points including the extension and modification of Sheepfold Lane, a four arm roundabout provided on A1198/Caxton Bypass and an access point off the A1198, south of the Caxton Gibbet to serve the proposed employment uses; a network of



segregated pedestrian and cycle routes; sustainable drainage system and other infrastructure; together with associated earth works, parking, open space, including equipped play, playing fields and landscaping.”

- 8.73 The supporting Design & Access Statement confirmed that [emerging] Policy SC/4 requires a convenience shopping store of up to 500 sq m gross (for 1,200 dwellings). Given the greater extent of housing proposed, the Design & Access Statement stated that a figure of up to 1,000 sq m of A1-A5 retail uses including convenience shopping, services and food and drink would be more appropriate. Taking into account parking requirements, the applicant concluded that the total area for A1 - A5 uses is approximately 0.29 hectares (page 32).
- 8.74 Condition 6 of the decision notice is relevant in respect of retail and town centre uses, confirming the approved levels of development:
- Up to 2,350 homes with a mix of tenures and dwelling sizes (defined within the S106);
  - Secondary school (D1) – within a site of 6.4 ha;
  - Two primary school (D1) – within sites each of 2.3 ha;
  - Community space of 715sqm gross internal floorspace;
  - **Retail units (A1-A5) - 1,500sqm gross internal floorspace;**
  - Flexible mixed-use employment units (B1a, B1b and B1c) - 30,625sqm gross internal floorspace; and
  - Sports pavilion.
- 8.75 More recently, reserved matters, including details of retail floorspace, was approved in June 2020. The Reserved matters application (Ref: 20/1640/REM) related to a parcel of land located in Sheepfold which is in the north east of the development within Phase 1. Condition 28 of the decision notice clarified that no more than 20% of the total retail floorspace shall be in Class A4 use; and no more than 20% of the total retail floorspace shall be in Class A5 use. The application approved 286 residential units, along with 617 sq m of retail floorspace in the form of 10 units.
- 8.76 Cambourne West has **planning permission for 617 sq m gross of retail floorspace** within Sheepfold. The floorspace is committed, but has not yet been implemented. There is no further planned retail floorspace within the outline permission across the wider Cambourne West strategic site.

## Summary

- 8.77 Table 9.1, 9.2 and 9.3 below summarise planned, committed and completed development coming forward on development plan strategic site allocations. The analysis confirms that there is:
- c.20,300 sq m gross of **planned** retail and town centre floorspace across Greater Cambridge, plus a Local Centre at Bourne Airfield yet to be defined. The largest concentrations of retail and town centre floorspace are planned to come forward at NEC and Cambridge East;



- c.55,000 sq m gross of **committed** retail and town centre floorspace, with the largest concentrations at Waterbeach and Northstowe;
  - c.10,780 sq m gross of **completed** retail and town centre floorspace, including one larger foodstore at Eddington, North West Cambridge, occupied by Sainsbury's.
- 8.78 Retail and town centre floorspace across the strategic sites are all, without exception, intended to serve new settlements, promoting sustainable living rather than creating 'destination' retailing which may compete with the city centre and encourage car borne travel. Given new levels of population, these developments are unlikely to claim any residual retail floorspace need identified in the next Section (Section 10).
- 8.79 The largest settlements with the highest level of new homes – and corresponding highest levels of retail and town centre floorspace – include Waterbeach, Northstowe, NEC and Cambridge East. Waterbeach and Northstowe are at more advanced stages of development, both benefitting from planning permissions. Retail and town centre floorspace within these larger settlements is intended to serve local needs, albeit Waterbeach has planning permission allowing for units up to 4,000 sq m gross, which might include a larger scale foodstore reaching a wider than local catchment area.

**Table 9.1: Planned Development**

Strategic Site Allocation	Floorspace/Land Use
North East Cambridge (NEC) Draft AAP	Draft AAP 1 x District Centre and 3 x Local Centres 2,650 sq m gross (convenience) / 2,475 sq m gross (comparison) / 2,175 sq m gross ('other') / Total: 7,300 sq m gross
West Cambridge 16/1134/OUT - Undetermined	Up to 4,000 sq m retail, food and beverage (A1-A5)
Darwin Green 2 Site Allocation SS/2	Remainder of South Cambridgeshire Site Allocation SS/2 planned, but no proposals or planning application to date. May include local shopping, but would form only a small extension to the committed Local Centre on the boundary within Darwin Green 1 (Committed Development)
Cambridge East Local Plan site allocations R41, R47 and SS/3 AAP	Up to 12,000 new homes, with one large district centre and a network of smaller local centres. One small local centre has been approved (see Table 9.2 below), but the remainder of the site is yet to come forward to planning, with the likelihood



Strategic Site Allocation	Floorspace/Land Use
	of a greater level of retail and town centre floorspace.
Waterbeach (East) S/2075/18/L - Undetermined	1 x District Centre and 1 x Local Centre 3,500 sq m gross – convenience 3,000 sq m gross – comparison 2,500 sq m gross – ‘other’ Use Class A
Bourne Airfield Site Allocation SS/7	Planned Bourne New Village on remainder of Site Allocation SS/7 (some already committed development, see Table 9.2 below). 3,500 new homes including new Local Centre. No current proposal or planning application

Note: Site Allocation Unimplemented or Planning Application Validated but Undetermined

Table 9.2: Committed Development

Strategic Site Allocation	Floorspace/Land Use
Grafton/Fitzroy 19/0512/FUL	1 x Hotel / 1 x Ancillary Restaurant
Cambridge East 18/0481/OUT	1 x Local Centre Up to 1,850 sq m gross A1-A5, B1a, D1 and D2; Including foodstore no more than 500 sq m gross.
Cambridge Bio-Medical Campus 06/0796/OUT	On-Site Amenities Hub 3,261 sq m gross
Darwin Green 1 C/07/0003/OUT and S/0001/07/F 15/1670/REM	1 x Local Centre To include 1 x foodstore (1,200 sq m gross) To include 500 sq m gross retail unit.
Waterbeach (West) S/0559/17/OL	16,500 sq m gross A1-A5 1 x District Centre / 1 x Local Centre No single unit larger than 4,000 sq m / 2 x foodstore
Bourne Airfield 20/02568/FUL	Employment/Light Industrial to include 1 x supplementary café/restaurant, ancillary to employment uses only. No additional retail or town centre floorspace.
Cambourne West S/2903/14/OL 20/1640/REM	Outline planning permission – 1,500 sq m gross A1-A5;



Strategic Site Allocation	Floorspace/Land Use
	Reserved Matters Permission – 617 sq m gross A1-A5
Northstowe	Phase 1 – S/0388/12/OL, 1 x Local Centre 1,500 sq m net retail 450 sq m net A3/A4/A5/D1 and D2 Phase 2 – S/2011/14 and S/2423/19/DC 12,000 sq m net convenience, comparison and service; 13,500 sq m net food, beverage and leisure; 9,000 sq m civic hub. Phase 3a – 20/02171/OUT 1 x Local Centre including convenience store of 615 sq m gross; local shops and services 2,530 sq m gross, and secondary mixed-use zones 13,300 sq m gross. Phase 3b – 20/02142/OUT Secondary mixed use zone 1,320 sq m gross

Note: Planning application approved, but development not yet implemented

Table 9.3: Completed Development

Strategic Site Allocation	Floorspace/Land Use
Station Areas 08/0266/OUT	5,255 sq m gross A1/A3/A4/A5, anchored by Sainsbury's Local and M&S Simply Food
Southern Fringe	Trumpington Meadows (S/0054/08/O) / (S/2647/16/REM) 450 sq m retail including 1 x foodstore (Sainsbury's Local) plus 2 x small units. Clay Farm (07/0620/OUT) / (14/1201/REM) 1 x Local Centre: 2,300 sq m GEA, 12 units, including 1 x foodstore 500 sq m GEA occupied by Nisa.
North West Cambridge (Eddington) 11/1114/OUT and S/1886/11 Superseded by:	1 x Foodstore, 2,000 sq m net (Sainsbury's) 1 x Retail Unit 175 sq m gross



Strategic Site Allocation	Floorspace/Land Use
S/2036/13 and 13/1402/S73 13/1748/RM	
Orchard Park S/2379/01/0	0.56 hectares of Local Centre facilities. A1-A5 and D2; One Stop convenience store open and trading.

Note: Planning applications implemented with retail and town centre floorspace open and trading



## 9. Quantitative Need

- 9.1 In this section we set out our assessment of the need for additional convenience and comparison goods retail floorspace across Greater Cambridge. We set out the performance of existing floorspace as the basis for forecasting the need for additional retail floorspace to the period 2040, incorporating interim years of 2023, 2025, 2030 and 2035. The quantitative tabulations accompanying this assessment are set out in Appendix 1 (convenience) and 2 (comparison).
- 9.2 In identifying need, it is important to note that forecasts become increasingly open to margins of error over time, and accordingly will need to be refreshed over the course of the Council's Local Plan. This is particularly the case given the current Covid-19 health pandemic and unknown mid to long term consequences for the economy.
- 9.3 We have used a conventional and widely accepted step by step methodology, drawing upon the results of the household telephone survey of existing shopping patterns (2019) to model the existing flows of available expenditure to the network of centres and edge/out-of-centre retail provision. To develop the baseline, we have:
- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising the Greater Cambridge study area;
  - Allocated the available projected expenditure to the convenience and comparison goods shopping destinations, on the basis of the household telephone survey of shopping patterns so as to provide estimates on current sales and forecasts of future sales;
  - Compared the total expenditure attracted to each shopping destination with current retail floorspace to assess sales densities/performance in each shopping destination.
- 9.4 Building on the baseline position, we have explored the need for further convenience and comparison retail floorspace within each local authority, having regard to the identified performance of existing floorspace.

### Data Inputs

#### Survey Area and Household Telephone Survey

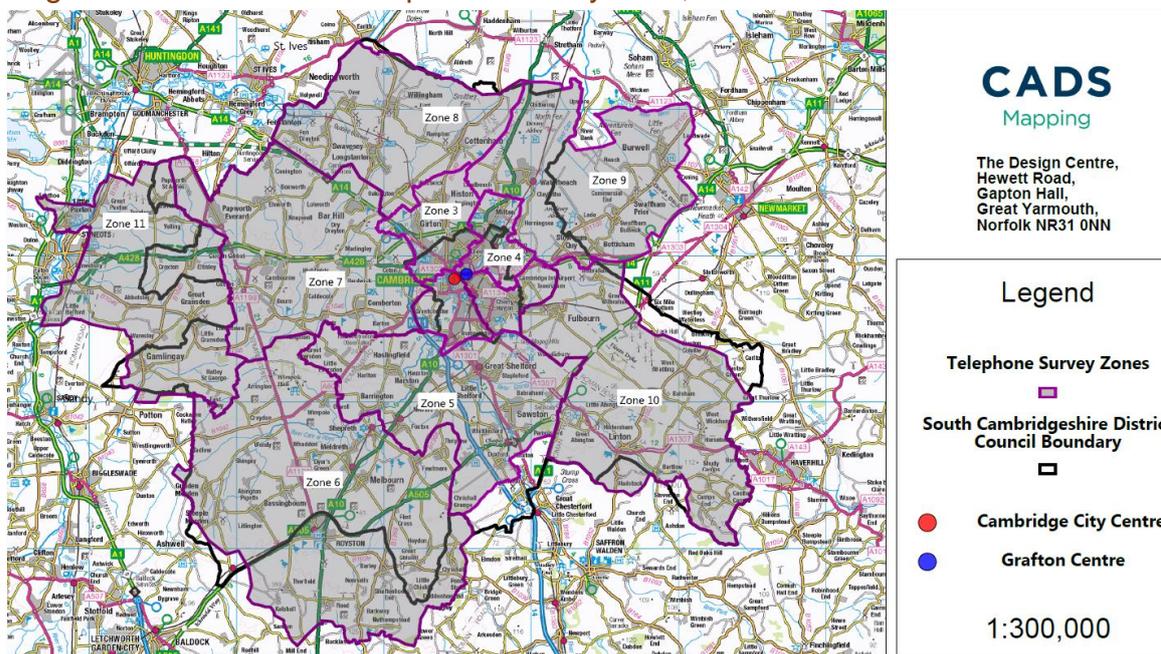
- 9.5 As introduced earlier in this study, a new household telephone interview survey was undertaken covering 1,100 households across 11 survey zones (Figure 9.1 below). Urban Shape designed the survey questionnaire in consultation with the Council and NEMS Market Research, who undertook the interviewing and data processing in October 2019. The survey area is shown below.
- 9.6 The survey results (2019) identify shopping habits of households for both convenience and comparison goods. Where necessary, survey results have been rebased to remove some responses (such as 'don't shop for particular



goods' and 'internet shopping') to ensure consistency with categories excluded in the expenditure projections.

9.7 For convenience goods, the household telephone survey included questions on main food and top-up food shopping. The results of the two types of food expenditure were then merged through the application of a weight which reflects the estimated proportion of expenditure accounted for by each goods type (70% main food / 30% top-up food). This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey zone.

Figure 9.1: Household Telephone Survey Area, 2019



9.8 The household telephone survey also included seven questions on where respondents normally undertake shopping for the following comparison goods types, which coincide with Experian Business Strategies definitions of comparison goods expenditure:

- Clothing and footwear;
- Furniture, floor coverings and household textiles;
- DIY and decorating goods;
- Domestic appliances;
- Audio-visual equipment;
- Personal and medical goods; and
- Recreational and luxury goods.

9.9 In order to determine the composite market share for all comparison goods spending within the survey area, we apply the weighted averages of the



household telephone survey results for each goods type based on the proportion of per capita spend on that goods type. This process establishes the pattern of comparison spending for residents in each of the survey zones and is an accepted approach which ensures that market shares for centres and stores are not skewed by any particular goods category.

### Population

- 9.10 Population estimates and forecasts for each of the survey zones are derived using the Experian E-Marketer in-house system. This provides estimates of population based on trend-line projections and the 2011 census for small, localised areas. Overall, the population of the survey area in 2020 is estimated to be 354,307, growing to 360,681 in 2025, 371,781 in 2035 and 375,261 in 2040. This represents an overall increase of 6% over the course of the assessment period.

### Available Expenditure in the Survey Area

- 9.11 The Experian E-Marketer system provides estimates of per capita expenditure for convenience and comparison goods expenditure in 2018 prices. We have made deductions for Special Forms of Trading (SFT) which represent expenditure not available to spend in shops (for example internet or catalogue shopping). The deductions we have applied for SFT for convenience and comparison goods are derived from Experian Retail Planner Briefing Note 18 (October 2020).
- 9.12 To estimate available expenditure in the survey area, we have applied growth rates based on economic forecasts published by Experian Business Strategies, ensuring due consideration to the consequences of Covid-19 (Retail Planner 18, October 2020). These trends are discussed in detail in Section 3.
- 9.13 There was a food shopping boom during 2020 as people when through a period of lockdown 'panic-buying' amid fears of food shortages, and restaurants and pubs closed removing the option to 'eat out'. This is forecast to substantially decline during 2021, thereby cancelling out this fluctuation, with growth per head returning to pre-Covid levels. For convenience goods we have applied growth rates of 0.2% per annum in 2022; 0% 2023-2027; and 0.1% for the period 2028-40.
- 9.14 Comparison goods are expected to benefit as an improvement in confidence and incomes help stimulate discretionary spending next year. We have already seen retail spending bounce back swiftly following the easing of lockdown during summer 2020. Volumes are expected to reach pre-Covid levels in 2022, and whilst the growth outlook remains similar to before, in levels terms, spending is likely to average 9% below levels expected before the pandemic. For comparison goods, we have applied growth rates of -8.5% 2020; 6.5% 2021; 3.8% 2022; 3.0% 2023-2027; 2.9% 2028-2040.
- 9.15 Using the growth rates above and applying relevant deductions for SFT, total available expenditure across the survey area has been grown in five-year intervals (including 2025, 2030, 2035, 2040) up to 2040, and also including short-



term interim year 2023 given the uncertainties around trends as a consequence of the pandemic. Total expenditure is forecast as follows:

- Appendix 1, Table 3 applies per capita expenditure to the population forecasts, which indicates that total available **convenience** goods expenditure within the survey area is £730m (2020). This is forecast to fall to £698m by 2023, £699m by 2025, £710m by 2030, £719m by 2035 and to a total of £727m by 2040. This equates to an overall drop of £2.5m between 2020 and 2040 (Appendix 1, Table 3).
  - **Comparison** goods expenditure within the survey area at 2020 is £966 million. This is forecast to grow to £1.171 billion by 2025, £1.336 billion by 2030, £1.534 billion by 2035, to a total of £1.772 billion by 2040. This equates to an overall growth for comparison goods expenditure in the survey area of £806 million between 2020 and 2040 (83% growth) (Appendix 2, Table 3).
- 9.16 Longer term projections should be treated with caution due to the potential for changing economic circumstances and growing margins of error over the longer term. The projections are subject to greater than usual uncertainty due to the unprecedented nature of the Covid-19 pandemic.

## Convenience Goods Assessment – Cambridge City Council

### Turnover/Shopping Patterns

- 9.17 Convenience goods floorspace in the Cambridge City administrative area is located across the city centre, district and local centres and five major out-of-centre foodstores/food superstores. Table 9.1 below lists the most popular foodstores in the local authority area by turnover derived from the survey area (Zone 1-11). The data reaffirms that the four most popular stores are the food superstores in out-of-centre locations, closely followed the Aldi Histon Road district centre store.
- 9.18 In Cambridge City Centre, the most popular store is the Little Waitrose at the Grafton Centre, followed by Sainsbury’s Sidney Street, Tesco Express Grafton and M&S Market Square. Sainsbury’s in Eddington is the most popular Local Centre foodstore.

Table 9.1: Most Popular Foodstores in Cambridge City Council by Turnover

Ranking	Foodstore	Turnover (£m)	Sequential Location
1	Sainsbury’s Superstore, Coldham’s Lane	£48.6m	Out-of-Centre
2	Waitrose, Trumpington	£48.2m	Out-of-Centre
3	Asda, Beehive Centre	£34.0m	Out-of-Centre
4	Tesco Superstore, Cheddars Lane	£32.7m	Out-of-Centre



Ranking	Foodstore	Turnover (£m)	Sequential Location
5	Aldi, Histon Road, Cambridge	£32.5m	District Centre
6	Waitrose (Little), The Grafton Centre	£11.8m	City Centre
7	Sainsbury's Superstore, Eddington	£9.7m	Local Centre
8	M&S Simply Food, Beehive Centre	£6.2m	Out-of-Centre
9	Co-Op, Mill Road East	£6.0m	District Centre
10	Sainsbury's, Sidney Street, Cambridge	£5.9m	City Centre
11	Co-Op, Mitcham's Corner	£4.5m	District Centre
12	Co-Op, Hills Road/Cherry Hinton Road	£4.2m	Local Centre
13	Co-Op, Arbury Road/Milton Road	£4.1m	Local Centre
14	Tesco Express, The Grafton Centre	£4.0m	City Centre
15	M&S Simply Food, Market Hill/Square	£3.9m	City Centre
16	Sainsbury's Local, Mill Road West	£3.9m	District Centre
17	Cambridge City Centre Historic Core (Other)	£3.6m	City Centre
18	Budgens, Arbury Court	£3.3m	District Centre

9.19 Within the survey area (Zones 1-11), the city-wide network of foodstores combined (listed in Table 5, Appendix 1) have a market share of 41.2% (£300.5m). This level of trade retention is not a cause for concern given the extent of the survey area outer boundary and localised nature of convenience goods shopping. Zones 1, 2 and 4 most closely correlate to the Cambridge City authority boundary, within which the network of foodstores have a market share of 79.0%, 79.4% and 74.0% respectively. A small area of Zone 3 falls within the Cambridge City administrative area, and foodstores in Cambridge therefore have a lower market share of 43.7% within this zone.

9.20 We identify the three most popular foodstores for those living within each of the central survey zones (1-4) as follows:



- Zone 1: Sainsbury's Superstore Coldham's Lane (24% Zone 1 market share)
    - Tesco Superstore, Fulbourn (14.1%)
    - Asda, Beehive Centre (11.4%)
  - Zone 2: Waitrose, Trumpington (39.8% Zone 2 market share)
    - Sainsbury's Superstore, Coldham's Lane (6.8%)
    - Tesco Superstore, Fulbourn (6.4%)
  - Zone 3: Tesco Superstore, Milton (24.6% Zone 3 market share)
    - Aldi, Histon Road (13.4%)
    - Tesco Extra, Bar Hill (5.6%)
  - Zone 4: Tesco Superstore, Cheddars Lane (22.7% Zone 4 market share)
    - Tesco Superstore, Milton (17.5%)
    - Sainsbury's Superstore, Coldham's Lane (11.8%)
- 9.21 Sainsbury's Eddington is highlighted in the data as having a particularly low market share in its location zone. The store is located in Zone 3 where it has a market share of just 1.7%. Residents are instead choosing to travel to Tesco Milton in Zone 4 (24.6%), Aldi Histon in Zone 3 (13.4%), Tesco Extra Bar Hill in Zone 7 (5.6%), Asda Beehive Centre in Zone 1 (5.5%), and Tesco superstore Cheddars Lane in Zone 4 (5.1%).
- 9.22 Unlike the main out-of-centre food superstores across Cambridge City, Sainsburys Eddington is located off the main road network and is considerably smaller than the main food superstores, designed to serve a more local catchment area. The store opened in September 2017 as one of the first phases of a strategic residential growth area to the north west of the city centre, and a direct route across the wider site to the store is currently only open to vehicles at the weekend. Performance is likely to improve as further phases are completed, the store becomes more established, and when adjoining retail units are fully occupied and open.
- Cambridge City – Floorspace Performance**
- 9.23 Our methodology estimates the trade draw and performance of foodstore destinations across Cambridge City administrative area. Key 'town centre' foodstores in the city centre include Sainsbury's Superstore on Sidney Street, M&S Simply Food on Market Hill, Sainsbury's Local on St Andrews Street, and Waitrose and Tesco Express at The Grafton Centre. The data concludes that the larger foodstores in the historic core – Sainsbury's Sidney Street and M&S Market Hill – are underperforming, whilst the smaller foodstores in the Grafton Centre – Waitrose and Tesco Express – and the Sainsbury's Local St Andrews Street are performing well.
- 9.24 Based on a convenience goods turnover of £5.9m and a floorspace of 1,193 sq m net, we estimate the Sainsbury's Superstore on Sidney Street has an average convenience goods sales density of £4,946 per sq m net. This is lower than company average sales (£12,191 per sq m net) but is not a dissimilar level to that identified in the 2013 study. Given the town centre location, the recorded figure is likely to be buoyed by top up passing trade, students and local employee



spending from those living further afield. Rather than a main or top up food shopping destination, the store is instead likely to perform a 'passing trade' function.

- 9.25 M&S Simply Food has a turnover of £3.9m and sales density of £3,507 per sq m net; and like Sainsbury's this is below the company average sales density of £10,965 per sq m net. Our observations on a number of site visits recorded the store consistently busy with high footfall and check-out queues. M&S Simply Food stores across the country benefit from linked trips with adjoining shops and lunchtime trade from local employees – spend that would not necessarily be picked up in a household telephone survey. We conclude that the store is performing well, and likely to have a turnover greater than that recorded.
- 9.26 The Sainsbury's Local on St Andrews Street and Tesco Express in the Grafton Centre are performing well, in line with expected company average sales densities. The strongest performing store in the city centre is Little Waitrose, Fitzroy Street in the Grafton Centre, with an estimated convenience goods turnover of £11.8m. Based on a floorspace of just 265 sq m net, we estimate that the Waitrose store has an average convenience goods sales density of over £44,000 per sq m net – substantially higher than company average sales of £13,431 per sq m net.

#### District and Local Centres – Floorspace Performance

- 9.27 The network of district and local centres are generally performing well, in-line with company average expectations. The most popular stores in respect of turnover include Co-op, Mill Road East; Co-op, Mitcham's Corner; Co-op, Hills Road/Cherry Hinton Road; Co-op, Arbury Road/Milton Road; Sainsbury's Local, Mill Road West; and Budgens, Arbury Court (Table 12, Appendix 1).
- 9.28 It is clear from the data that almost all convenience stores in the local and district centres have a good floorspace performance, with the strongest being the four Co-op stores in Mill Road East, Mitcham's Corner, Hills Road/Cherry Hinton Road, Arbury Road/Milton Road. Aldi on Histon Road has a convenience goods turnover of around £32.5m, and based on a convenience goods floorspace of 1,030 sq m net we estimate that the store has an average convenience goods sales density of £31,553 per sq m net. This is substantially higher than company average sales (£9,930 sq m net) and reflects the popularity of deep discount retailers in the marketplace.
- 9.29 As discussed above, Sainsbury's Eddington is a relatively new store with limited impact on market share to date. The store currently has a turnover of around £9.7m. Based on a convenience goods floorspace of 1,600sq m net, we estimate that the store has an average convenience goods sales density of £6,063 per sq m net, compared to company average levels of £12,191 per sq m net.
- 9.30 Two further exceptions are the relatively new local foodstores at CB1 – M&S Simply Food and Sainsbury's Local. The data highlights that both stores have low turnovers and floorspace performances of £1,899 and £2,035 per sq m net respectively. This compares poorly with company average sales densities of £10,965 per sq m net (M&S) and £12,191 per sq m net (Sainsbury's).



- 9.31 Both stores are located close to Cambridge mainline railway station, and will benefit from substantial passing footfall from commuters, visitors, students and local shoppers – spend that would not always be picked up in a household telephone survey. Performance should be monitored, but the local scale foodstores are likely to perform well in this location, consistent with qualitative observations during site-visits.

### Out-of-Centre Foodstores – Floorspace Performance

- 9.32 Sainsbury's superstore, Coldhams Lane is located in Zone 1 of the survey area, access directly from the A1134 east of the city centre. It is the strongest performance out-of-centre foodstore in the city area, and has a convenience goods turnover of around £48.6m – estimated to comprise around 60% of net floorspace with the remainder occupied by comparison and other goods. Based on this turnover, and with a net convenience goods sales area of 2,499 sq m, we estimate the sales density to be around £19,448 per sq m net, higher than Sainsbury's company average of £12,191 per sq m net. This is an improved performance since 2013.
- 9.33 Waitrose Trumpington is the only full sized Waitrose store in the Greater Cambridge study area, and it is performing particularly well. We estimate that the store currently has a turnover of around £48.2m, higher than the level recorded in the 2013 study (£37.7m). Based on this turnover, and with a net convenience goods sales area of 2,678 sq m, we estimate the sales density to be c.£17,999 per sq m net, higher than company average levels of £13,431 per sq m net. The floorspace performance of this store has improved since the 2013 study, when it achieves a sales density of £14,080 per sq m net.
- 9.34 Asda, Beehive is located in Zone 1 of the survey area, east of the city centre. The 2013 study concluded that this store was underperforming considerably; and this up-date-analysis concurs with this conclusion albeit the store has improved its performance. We estimate that the store currently has a turnover of around £34.0m, higher than the level recorded in the 2013 study (£23.3m). Based on this turnover, and a net convenience goods floorspace of 2,274 sq m, we estimate the sales density to be c.£14,952 per sq m net – lower than company average (£17,285 per sq m net) but higher than concluded in the 2013 study (£8,658 per sq m net).
- 9.35 The 2013 study concluded M&S to be under-performing quantitatively, but seemingly well used and popular during site visits and qualitative observations. The new evidence supports these findings and presents a consistent performance. Situated close to the Asda superstore, the M&S Simply Food currently has a turnover of around £6.2m – higher than that identified in 2013 (£4m). Based on this turnover and a net convenience goods floorspace of 973 sq m, we estimate the sales density to be c.£6,372 per sq m net – higher than that calculated in 2013 (£4,087 per sq m net), but lower than company average expectations (£12,911 per sq m net).
- 9.36 Qualitatively, both Asda and M&S at the Beehive Centre appeared busy and well used, and have been established shopping destinations for a number of years. They are, however, in close proximity to a number of other major food



superstores including Sainsburys Coldham's Lane, Tesco Cheddars Lane, Tesco Milton and Tesco Fulbourn, and are not as competitive in terms of market share/trade draw across Zone 1, 3 or 4.

- 9.37 Tesco Cheddars Lane is located in Zone 4 of the survey area, to the north east of the city centre. It is the second largest foodstore and we estimate it currently has a turnover of around £32.7m – only marginally higher than identified in the 2013 study (£28.6m). Based on this turnover and a net convenience goods floorspace of 2,449 sq m, we estimate the sales density to be c.£13,352 per sq m net – higher than that calculated in 2013 (£10,766 per sq m net) and marginally above company average expectations (£12,911 per sq m net).

## Convenience Goods Assessment – South Cambridgeshire District Council

### Turnover/Shopping Patterns

- 9.38 Convenience goods floorspace in South Cambridgeshire District is located across the network of 'Village Settlements', and in policy terms they are all 'town centre' foodstores. There are a large number of smaller local convenience stores across the large rural catchment (Table 5, Appendix 1), with the most popular stores – in terms of turnover – including Tesco Express, Histon & Impington; Co-op, Melbourn; Co-op, Great Shelford; and Tesco Express, Great Shelford.
- 9.39 Table 9.2 below lists the most popular foodstores in the local authority area by turnover derived from the survey area (Zone 1-11). The data reaffirms that the four most popular stores are the food superstores typically of a size and format found in out-of-centre locations, but in this case defined in policy as Village Settlements. Within the survey area (Zones 1-11), the network of foodstores across South Cambridgeshire combined (listed in Table 5, Appendix 1), have a market share of 24.7% (£172.2m).

Table 9.2: Most Popular Foodstores in South Cambridgeshire by Turnover

Ranking	Foodstore	Turnover (£m)	Sequential Location
1	Tesco Superstore, Milton	£46.3m	Village Settlement
2	Tesco Superstore, Fulbourn	£40.2m	Village Settlement
3	Morrisons, Cambourne	£32.7m	Village Settlement
4	Tesco Extra, Bar Hill	£43.5m	Village Settlement

- 9.40 Aside from the main food superstores, the data analysis demonstrates the important role of smaller local convenience stores across the network of village settlements. The following list sets out the market share of each foodstore in each survey zone – this will form the baseline when considering planning for sustainable communities, new development and consequent impact:

- **Zone 5:** Waitrose, Trumpington (19.9%); Tesco Extra, Royston (10.2%); Co-op, Great Shelford (7.8%); Tesco Superstore, Fulbourn (7.6%); Tesco



Express, Great Shelford (6%); Co-op, Sawston (5.4%); and Tesco Extra, Bar Hill (5.1%);

- **Zone 6:** Tesco Extra, Royston (50.1%); Aldi, Royston (11%), Morrisons, Royston (10.7%); and Co-op, Melbourn (6.6%);
- **Zone 7:** Morrisons, Cambourne (34%); Tesco Extra, Bar Hill (19.2%); Sainsbury's, Eddington (8.8%); and Aldi, St Neots (5.7%);
- **Zone 8:** Tesco Extra, Bar Hill (36%); Co-op, Cottenham (8.2%); Aldi, Histon (7.2%); Co-op, Longstanton (6.4%); and Co-op, Willingham (5.0%);
- **Zone 9:** Tesco Superstore, Milton (16.6%); Waitrose, Newmarket (11.4%); Tesco Superstore, Fulbourn (11%); Tesco Extra, Newmarket (8.9%); Bottisham Village Centre (7.7%); and Co-op, Burwell (7%);
- **Zone 10:** Tesco, Fulbourn (19%); Sainsbury's Superstore, Haverhill (17.4%); Co-op, Linton (11.2%); Co-op, Fulbourn (8.3%); and Aldi, Haverhill (6.8%);
- **Zone 11:** Tesco Extra, St Neots (26.4%); Waitrose, St Neots (8.9%); Co-op, Gamlingay (8.3%); Morrisons, Cambourne (8.1%); and Aldi, St Neots (6.7%).

9.41 It is evident from the data that residents of some zones are more likely to visit foodstores outside Greater Cambridge. This is particularly the case in Zone 6 and Zone 11, where foodstores in Greater Cambridge have more limited influence on food shopping patterns.

#### Village Settlements – Floorspace Performance

- 9.42 Tesco Superstore, Milton is located in Zone 4, within close proximity to Zone 3 and Zone 9, and to the north east of the city centre. We estimate that the store has a convenience goods turnover of £46.3m. Based on a convenience goods floorspace of 2,244 sq m net, we estimate that the Tesco store has an average convenience goods sales density of £20,633 per sq m net. This is higher than the Tesco company average levels (£12,911 per sq m net), and broadly in line with that last recorded in the Council's 2008 evidence base (£20,385 per sq m net).
- 9.43 Tesco Superstore, Fulbourn is located towards the outer edge of Zone 1, to the north east of the city centre and close to the boundary with Zone 9 and 10. We estimate that the store has a convenience goods turnover of £40.2m. Based on this turnover, and with a net convenience goods sales area of 2,458 sq m, we estimate the floorspace performance sales density to be around £16,354 per sq m net. This is marginally higher than Tesco company average levels (£12,911 per sq m net), and higher than last recorded in the 2008 evidence base (£13,694 per sq m net).
- 9.44 Morrisons, Cambourne is located within the western part of Zone 7, close to the boundary with Zone 11. We estimate that the store has a convenience goods turnover of around £32.7m. Based on a convenience goods floorspace of 2,693 sq m net, we estimate that the Morrisons store has an average convenience



goods sales density of £12,143 per sq m net. This is broadly in line with company average expectations (£11,300 per sq m net), and higher than last recorded in the 2008 evidence base (£8,540 per sq m net).

- 9.45 Tesco Extra, Bar Hill is located within the eastern part of Zone, close to the boundary with Zone 8. We estimate that the store has a convenience goods turnover of £43.5m. Based on this turnover, and with a net convenience goods sales area of 4,031 sq m, we estimate the floorspace performance sales density to be around £10,791 per sq m net. This is lower than Tesco company average levels (£12,911 per sq m net), and also lower than last recorded in the 2008 evidence base (£13,240 per sq m net) when it had a turnover of around £53m.
- 9.46 Floorspace performance density has improved in the Tesco Fulbourn and Morrisons Cambourne stores, stayed broadly similar in the Tesco Milton store, but declined in the Tesco Bar Hill store.

### **Convenience Goods – Need Forecasts, Greater Cambridge**

- 9.47 Based on population and expenditure growth, and the detailed performance analysis of existing floorspace, the analysis identifies a level of residual expenditure sufficient to support additional convenience goods floorspace across Greater Cambridge. Consistent with growth in expenditure on convenience goods, the short term outlook in respect of the sales efficiency of existing floorspace has been upgraded to reflect the boost to spending on food. This is a consequence of social distancing measures such as working from home and spending more time at home, and being unable to eat out in restaurants and cafes.
- 9.48 Experian assume an increase in sales efficiency rate for existing floorspace of 5.4% during 2020, but this is expected to unwind over the medium/longer term, with rates of -4.8% in 2021, 0.7% in 2022 and 0.3% thereafter.
- 9.49 The analysis is based on existing floorspace and committed development i.e. those planning applications that have been granted planning permission but not yet constructed/open for trading. When open, these schemes will claim a proportion of residual expenditure and must therefore be taken into consideration when forecasting over the longer term. The following larger scale commitments have been factored, as detailed previously in Section 8:
- Waterbeach District Centre, 1 x foodstore c.2,000 sq m net;
  - Northstowe District Centre, 1 x foodstore c.2,000 sq m net.
- 9.50 As discussed in Section 8, there is a substantial amount of new retail/town centre floorspace committed across Greater Cambridge throughout the strategic growth areas. Many of these are 'local centres' and have not been factored in to the need assessment as a 'claim on expenditure'; they will be self-supported by new housing and population growth. The two 'district centres' are intended to provide larger anchor foodstores, which – like Eddington – will draw trade from a wider catchment area and divert some trade from existing foodstores. These two foodstores are located within the largest strategic growth areas, with the largest levels of planned and committed retail floorspace.



9.51 The projections are summarised in Table 13, Appendix 1, which indicates that by 2025/2030 there will be an identified residual expenditure of £29.6m, followed by a fall to £28.5m in 2035, and £25.8m in 2040. Based on an average sales density of £12,000 per sq m net (grown according to recommended sales efficiency rates set out above), need forecasts are set out in Table 9.3 below, demonstrating no significant change over the plan period once the level of current need is met.

**Table 9.3: Convenience Goods Floorspace Need, Greater Cambridge (sq m net)**

2023	2025	2030	2035	2040
2,608	2,422	2,381	2,260	2,018

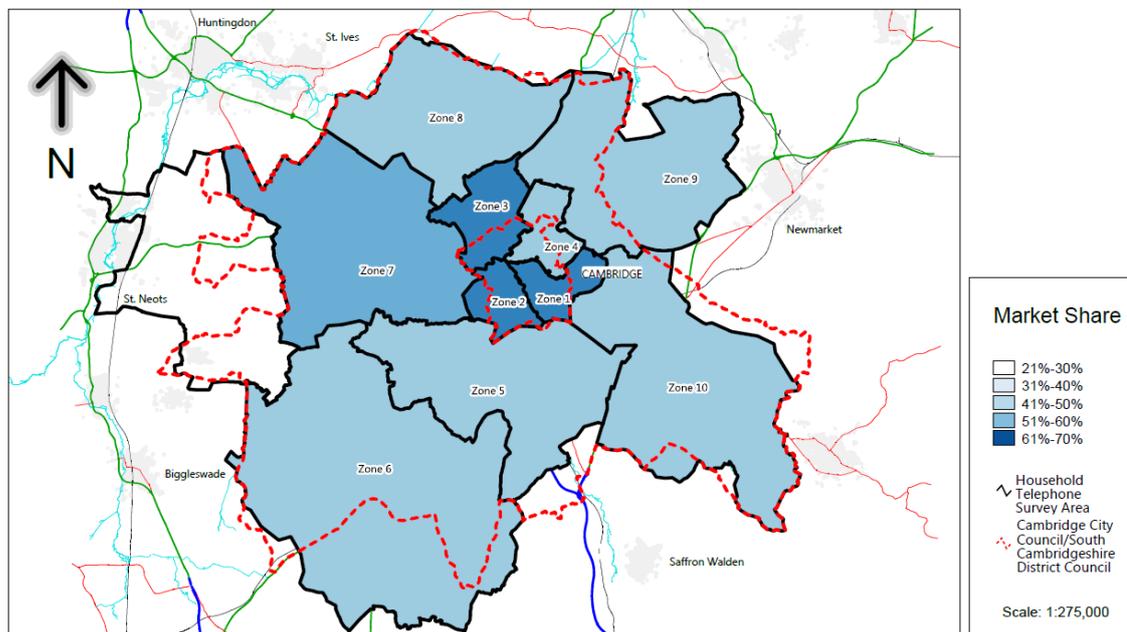
### **Comparison Goods Assessment – Floorspace Performance**

9.52 Figure 9.2 (below) illustrate the market share of Cambridge City, including the Grafton Area, across the full survey area. The plan highlights where the city is most dominant in terms of comparison goods trade draw, identifying Zones 1, 2 and 3 as key zones with market shares of 64.1%, 69.2% and 63.6% respectively.

9.53 Within the survey area, Cambridge City Centre draws 53.7% of total available comparison goods expenditure (£518.9m), and also benefits from a 32% inflow of trade from beyond Zones 1-11 (£244.2m). We estimate that the city centre has an overall comparison goods turnover of £763.1m. Based on a comparison goods floorspace of 60,856 sq m net, we estimate Cambridge City Centre to have a sales density of approximately £12,539 per sq m net. This is a strong performance for a city centre, and is much improved since the 2013 Study (£7,497 per sq m net) despite a small fall in market share and level of trade 'inflow'.



Figure 9.2: Cambridge City Centre (including Grafton) Comparison Goods Market Share



9.54 This increase in floorspace performance per sq m, is driven primarily by the reduction in comparison goods floorspace in the city centre, down from 87,677 sq m net in 2013 to 60,856 sq m net in 2020. This downward trend adjustment to retail business composition is consistent with national trends across most town and city centres in the UK. The findings are also consistent with the latest published research from Experian which notes that sales densities for comparison stores have risen at a strong pace. We discuss this further below.

## Comparison Goods Floorspace Need

### Floorspace Efficiency

- 9.55 In forecasting quantitative capacity for future comparison goods floorspace beyond the baseline (2020), we have drawn on economic commentary published by Experian in February 2020 and October 2020. In particular, our analysis and need assessment has regard to the implications of Covid-19 on floorspace efficiency; i.e. the rate in which existing floorspace will absorb any growth in expenditure over the plan period. This has a direct impact on the levels of floorspace need arising.
- 9.56 To the period February 2020 (pre-Covid-19), Experian confirmed that sales densities for comparison stores had risen at a strong pace, and were expected to continue to do so – remaining between 3.2% and 3.6% to the period 2026. Budgetary challenges, rising costs and tight margins were driving retailers to either close down or seek floor space efficiencies.
- 9.57 Experian explained that lacklustre demand for retail property, stubborn levels of vacant units and a lull in retail construction point to limited prospects for expansion in retail floorspace over the next few years. In this context, it was



expected that existing comparison goods floorspace would continue to absorb a greater proportion of any growth in retail expenditure as businesses sought to improve the quality and interest of their shops for visitors.

- 9.58 In current commercial markets, Experian concluded that there would not therefore be a strong demand for additional comparison goods retail space, with a growing proportion of expenditure growth being directed to the internet and the consolidation and improvement of existing floorspace – particularly in stronger city centres. These trends explain the considerable improvement in the performance of comparison goods floorspace in Cambridge City Centre (per sq m) in recent years.
- 9.59 Subsequent to the publication of these trends in February 2020, the Covid-19 pandemic had far reaching consequences for our high streets and town centres as all but essential shops and services closed for long periods of time. The Experian Retail Planner October 2020 revised sales efficiency forecasts in the context of Covid-19, stating that sharp swings in retail spending due to the temporary closure of businesses as well as ongoing social distancing restrictions have led to volatile sales densities in 2020. Whilst this is expected to correct once the spending recovery becomes more established, the medium-term forecast for sales densities has been revised lower in line with the downgrade in the outlook for retail spending.
- 9.60 The last 12-18 months represent a retail expenditure anomaly, and for the purposes of medium to longer term forecasting we have applied a medium to longer term subdued sales density of 2.8% over the plan period. This is lower than pre-Covid levels in line with reduced spending forecasts.
- 9.61 The comparison goods need assessment has assumed that Cambridge City Centre will maintain existing market share and the model has forecast the need for new comparison goods floorspace to the years 2025, 2030, 2035 and 2040. By virtue of growth in population and expenditure, we have projected that increases in available comparison goods expenditure will create a residual expenditure of £57.1m by 2025, £57.5m in 2030, £64.8m in 2035 and £82.3m by 2040.
- 9.62 This translates into surplus capacity to accommodate an additional 4,973 sq m net by 2025 but falling to 4,363 sq m net by 2030 and 4,282 sq m net by 2035. The increase in population and expenditure is not sufficient to out-pace expenditure claims in the form of online shopping and existing floorspace improving their business efficiency. Cumulative forecast expenditure growth leads to a marginally greater need for comparison goods floorspace later in the plan period (4,739 sq m by 2040).
- 9.63 We recommend the Local Plan should 'plan' to accommodate around 4,500 sq m net of comparison goods floorspace across Greater Cambridge to the period 2040.

## Summary

- Smaller convenience stores in Cambridge historic core have mixed performance data, with the larger stores including Sainsbury's Sidney Street



and M&S Market Hill underperforming, and the smaller store, Sainsbury's, St Andrew Street performing very well. The Tesco Express and Waitrose in the Grafton Centre are performing strongly, with Little Waitrose achieving a substantial sales density.

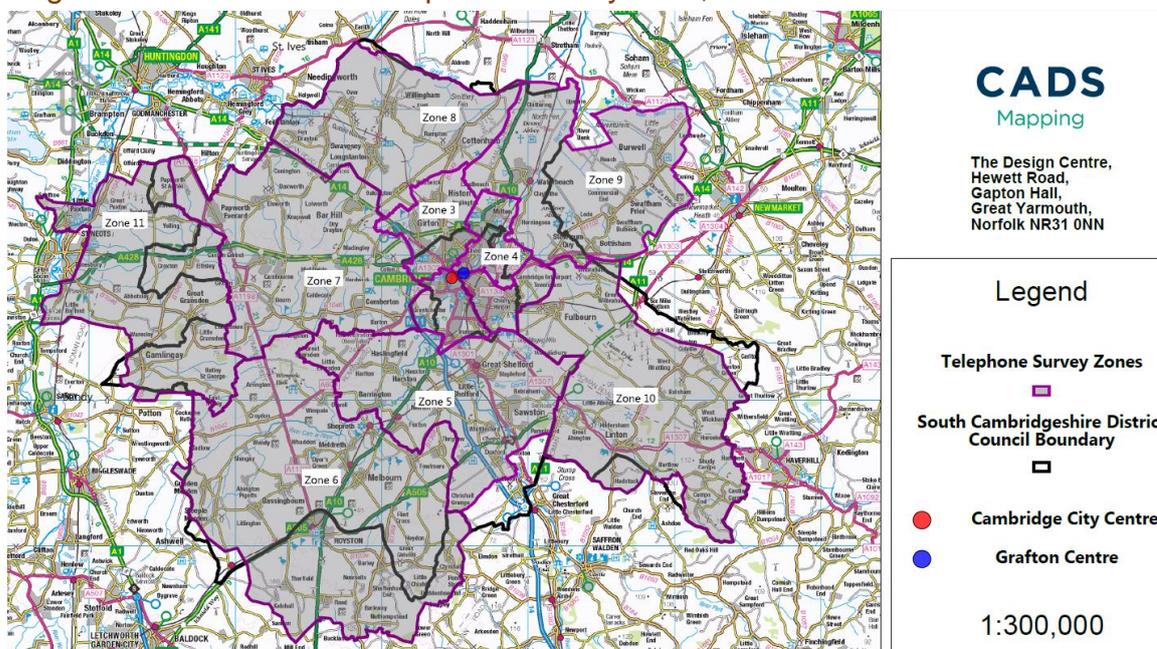
- All district and local centres across the city are performing well, aside from Sainsbury's Eddington which is still settling into new trading patterns. The data suggests that new local convenience stores at CB1 are underperforming, but in practice are likely topped up by substantial passing through-trade via the station.
- The four major out-of-centre food superstores in Cambridge City are the strongest in terms of turnover, closely followed by Aldi, Histon Road. Sainsbury's, Coldhams Lane and Waitrose, Trumpington are performing very well; Tesco, Cheddars Lane is performing adequately; but Asda and M&S Beehive are underperforming according to the data recorded.
- In South Cambridgeshire, the data demonstrates the important role of smaller local convenience stores throughout the network of village settlements, achieving strong market shares in their location zones. The analysis has highlighted that whilst three of the four major out-of-centre foodstores remain strong operators, Tesco Extra, Bar Hill is underperforming.
- On the basis of current market share and forecast growth in population and expenditure, we have identified capacity to support around 2,000-2,500 sq m net of convenience goods floorspace over the plan period. Given fluctuations in economic trends, this figure remains relatively unchanged in the period 2020-2040.
- Cambridge City Centre continues to be the most dominant comparison goods shopping destination in Greater Cambridge and the wider sub-region, achieving an overall market share of 53.7%. Section 4 has already reported that the city's market share remains almost unchanged since the previous 2013 study. In the context of a falling comparison goods floorspace and growth in population and expenditure to the period 2020, the city's performance sales density has experienced a strong increase from £7,497 per sq m net in 2013 to £12,539 per sq m net in 2020.
- Based on the current market share of the city centre and out-of-centre retail provision, our analysis identifies baseline capacity to support 4,363 sq m net of comparison goods floorspace by 2030, 4,282 sq m net by 2035 and 4,739 sq m net by 2040.



## 10. Leisure Assessment

- 10.1 Commercial leisure and cultural uses have played an increasingly important role in the vitality and viability of town centres by providing complementary uses that strengthen both the daytime and evening economies. This section of the report considers the current provision of commercial leisure uses throughout the study area, including patterns of visits to restaurants, cafes, cinema, pubs and bars, nightclubs, health and fitness, family entertainment venues, and cultural venues.
- 10.2 Drawing on the qualitative analysis of current provision, commercial trends, and a broad overview of the economic growth in leisure expenditure over the forthcoming plan period, we provide commentary on the potential need for different leisure uses. For the purposes of this leisure assessment we have analysed leisure travel patterns across the combined area of the central core zones 1-4, and the individual outer zones 5-11 (See Fig.10.1).

Figure 10.1: Household Telephone Survey Area, 2019



- 10.3 The telephone survey achieved the target response of 1,100 interviews, and within that sample 90% stated that they took part in a leisure or cultural activity. In respect of sampling, 34% were male respondents and 66% were female; and the age classifications were as follows:

■ 18-24	-	10.9%
■ 25-34	-	14.5%
■ 35-44	-	19.8%
■ 45-54	-	18.4%
■ 55-64	-	15.2%
■ 65+	-	21.3%



## Commercial Leisure Choices

10.4 The household survey results enabled the identification of the most popular leisure activities across the sub-region, the most frequent being 'cinema' and the least frequent being 'nightclubs':

▪ Cinema	-	62.2%
▪ Evening Eating Out/Restaurants	-	60.6%
▪ Cafes	-	57.8%
▪ Cultural/Arts Venues	-	55.3%
▪ Pubs and Bars	-	50.8%
▪ Daytime Eating Out/Restaurants	-	46.0%
▪ Health and Fitness/Gyms	-	26.8%
▪ Family Entertainment	-	22.4%
▪ Nightclubs	-	7.5%

### Cinema

10.5 The telephone survey results identify three dominant cinema destinations in the central Cambridge area, which also act as a significant draw across much of the wider survey area:

- **Vue, Grafton Centre:** This cinema first opened in 1995. It is located inside the Grafton Centre and benefits from an adjoining multi-storey car park which provides direct access (from level 4) into the cinema foyer. In 2004, the cinema converted from a Warner Cinema to a Vue branded cinema, and currently has 8 screens and over 500 seats. In 2011 the cinema obtained a license to sell alcohol and in 2015 the cinema underwent refurbishment converting all seats to luxury full reclining. Visitors enjoy 2D and 3D releases, with Sony 4K picture quality and Digital Dolby surround sound. It is the most popular cinema in the Cambridge sub-region.
- **Light Cinema, IMAX:** This cinema underwent refurbishment and opened as an IMAX in July 2017. The cinema has one IMAX screen, with a capacity of 189, and 8 regular screens ranging from 78 to 263 seated capacity. It offers bespoke premium seating, 2D and 3D visuals with new high end digital picture and sound audio, licensed café/bar, and discounted car parking at the leisure park. The IMAX cinema screen offers a fully immersive big screen cinema experience. It is the second most popular cinema in the Cambridge sub-region.
- **Arts Picturehouse, Historic Core:** A 2-screen cinema first opened at 38-39 St Andrew Street in 1937. The original cinema closed in 1997 and the site was taken on by Wetherspoons and reopened in 1999, with a pub on the ground floor and the 3-screen 'Arts' Picturehouse above street level. The cinema format champions art-house and repertory film, and offers a café, restaurant and licensed bar, and plays host to the annual Cambridge Film Festival. Regular organised screenings take place throughout the week for different groups, including babies, toddler time, autism and



dementia friendly, and silver screen. It is the third most popular cinema in the Cambridge sub-region.

- 10.6 For those living within the central urban area (Survey Zones 1-4), the three cinemas discussed are relatively equal in popularity. The Light IMAX cinema has a market share of 32.2%, the Arts Picturehouse has a market share of 31.3%, and the Vue cinema at The Grafton Centre has a market share of 29.4%. There is almost no leakage from the core urban area to alternative destinations beyond and further afield. The three existing venues provide a good choice across alternative cinema formats, from blockbuster through to arts, and with all providing a café, restaurant, bar offer.
- 10.7 Table 10.1 identifies the most popular cinemas for those people living within Zones 5-11. Outside Zones 1-4, the Cineworld brand is dominant, with venues in Stevenage, Huntingdon, Ely, Haverhill and St Neots. Despite the geographic spread of the Cineworld brand, the three cinemas in Cambridge continue to prove attractive to much of the Cambridge sub-region, aside from Zone 11 which looks almost entirely to St Neots and Huntingdon.

**Table 10.1: Cinema Choices Zone 5-11**

Zone	Cinema Choices	Zone	Cinema Choices
Zone 5	The Light Cinema, IMAX (38.0%) Vue, The Grafton (37.%) Arts Picturehouse (24.4%)	Zone 9	Vue Cinema, The Grafton (30.9%) The Light Cinema, IMAX (27.%) Arts Picturehouse (19.3%) <b>Cineworld, Ely (17.9%)</b>
Zone 6	<b>Cineworld, Stevenage Leisure Park (31.2%)</b> The Light Cinema, IMAX (24.9%) Vue Cinema, The Grafton (14.2%) Arts Picturehouse (7.0%)	Zone 10	<b>Cineworld, Haverhill (27.8%)</b> The Light Cinema, IMAX (24.3%) Arts Picturehouse (16.1%) Vue Cinema, The Grafton (13.4%)
Zone 7	Vue Cinema, The Grafton (37.3%) <b>Cineworld, Huntingdon (24.2%)</b> Arts Picturehouse (15.7%) The Light Cinema, IMAX (13.8%)	Zone 11	<b>Cineworld, St Neots (71.2%)</b> <b>Cineworld, Huntingdon (14.9%)</b> Arts Picturehouse (4.7%)
Zone 8	Vue Cinema, The Grafton (48.6%) Cineworld, Huntingdon (24.1%) Arts Picturehouse (15.3%)		



Zone	Cinema Choices	Zone	Cinema Choices
	<b>The Malting, Ship Lane, Ely (6.3%)</b>		

- 10.8 Traditional cinema venues are changing and adapting in response to wider TV, movie and streaming trends, and whilst the presence of cinemas in the leisure sector appears secure at present, the future is somewhat uncertain. From an historic high immediately post-war of 1.64 billion admissions during 1946, UK cinema admissions gradually declined to an all time low of just 54 million in 1984. Since that time, the advent of the multiplex and record levels of investment in improving the theatrical experience, has seen admissions recover and since 2000 they have remained above 150 million.
- 10.9 There has been much uncertainty in the cinema market given the advent of on-demand streaming services such as Netflix, a cheaper option in the comfort of your own home. Nevertheless, a serious detrimental impact has not yet occurred, with cinemas experiencing their highest admission figures in 2018 and 2019 since 1971.
- 10.10 Reasons for the market growth is varied. The industry has focused on the release of major blockbuster movies drawing in the crowds, and – importantly – include a more diverse genre from musicals to superhero and animated family films. Alongside films, cinemas have sought to diversify to offer live theatre and opera screenings, providing an alternative entertainment experience, and making West End productions affordable to a wider audience.
- 10.11 Alongside film release has been the significant investment in the actual cinema venues and the creation of an attractive cinema-going experience. Consumer expectations have risen, and cinemas have become places of comfy sofas, licensed bars, and good quality food and drink. Big cinema chains have installed higher-quality screens and are beginning to introduce monthly subscription plans similar to the ‘streamers’. Notably, the industry has seen the rise of more boutique operators such as Everyman; and chain that has tripled its number of venues and level of attendance across the UK over the last 4 years by offering a high end, boutique, quality cinema experience.
- 10.12 Crucially, as the younger generation question the need for cinema visits, preferring to stream more cost effectively at home, the largest growth has been in the older age categories. These groups, with a greater disposable income, often enjoy a pre-film dinner in the bar with friends, followed by a drink in the comfy reclining chairs on offer.
- 10.13 A relatively new trend in the cinema market is the growth of the ‘pop-up’ cinema, estimated to be worth around £10 million in 2019, and growing at between 20-25% per year. A pop-up cinema is a mobile or temporary cinema, usually set-up in locations such as a park, beach, the grounds of a visitor attraction, on a city centre roof-top or other distinctive indoor or outdoor venue. Sometimes, for example, they are decorated seasonally, such as the Christmas themed secret cinemas. They tend to screen timeless classics or popular modern films that consumers are very familiar with, enjoying the experience of watching them again



in a very different environment. Operators include Luna, Rooftop Film Club, Sundown Cinema, Backyard Cinema and Secret Cinema, for example.

10.14 In Cambridge, these trends would suggest that the three existing cinemas will remain viable, but that there is unlikely to be a need for any additional cinema facilities over the plan period. The city has a good mix of cinema format, with two venues occupying important city centre locations which must be protected. Cinemas were continuing to perform well throughout 2019, but a post Covid world and the continued march of streaming services like Netflix and the Pop-Up Cinema trend, retain a level of uncertainty over what the future for the cinema industry might look like and what direction it might take.

### Restaurants

10.15 Eating out in the evening is the second most popular leisure activity for those living within the Cambridge sub-region. Within the central urban core zones 1-4, over half (55.6%) are visiting the historic core in Cambridge City Centre as their destination of choice for this activity. Alternative destinations are scattered considerably amongst the retail parks and many local and village centres nearby on the outskirts of Cambridge. These include:

- Histon Village Centre (5.1%);
- Mill Road, Cambridge (3.8%);
- Cambridge Leisure Park (3.2%);
- Grantchester Village Centre (2.6%);
- Hills Road, Cambridge (1.6%);
- East Road, Cambridge (1.6%);
- Cambridge Retail Park (1.4%);
- Cherry Hinton Road (1.2%);
- Milton Road, Cambridge (1.1%)

10.16 When analysing 'eating out in the evenings' for the whole survey area, the historic core of Cambridge City Centre has a market share of 58.4%; a small increase since the 2013 Retail Study which identified a 55.1% market share. The 2013 Retail Study identified that 1.8% of the survey area was choosing to visit the Fitzroy/Burleigh Street area, but this destination was not cited in the up-to-date survey.

10.17 Table 10.2 identifies the most popular evening restaurant destinations for those people living within Zones 5-11, and it is clear that Cambridge historic core is the most popular destination in Zones 5-10. The data also demonstrates the importance and popularity of the village centres and nearby town centres – such as Ely, Newmarket and St Neots – within the Cambridge sub-region; and also the role of the leisure parks for those living in Zone 9.



**Table 10.2: Eating out in the Evenings - Choices Zone 5-11**

Zone	Locations	Zone	Locations
Zone 5	Cambridge Historic Core (56.4%) Great Shelford Village Centre (10.1%) Sawston Village Centre (7.3%) Fulbourn Village Centre (3.9%) Bartlow Village Centre (3.9%)	Zone 9	Cambridge Historic Core (35.1%) Newmarket (9.0%) Ely (8.4%) Cambridge Retail Park (7.5%) Cambridge Leisure Park (6.0%) Waterbeach Village Centre (5.7%) Burwell Village Centre (5.3%)
Zone 6	Cambridge Historic Core (47.0%) Royston Town Centre (27.2%) Biggleswade Retail Park (4.4%) Hitchin Town Centre (4.1%) Central London/West End (3.4%)	Zone 10	Cambridge Historic Core (53.5%) Saffron Walden (9.1%) Linton Village Centre (6.7%) Great Abington Village Centre (4.4%) Newmarket (3.2%)
Zone 7	Cambridge Historic Core (75.9%) Central London/West End (4.0%) St Neots (3.9%)	Zone 11	St Neots (33.6%) Cambridge Historic Core (16.1%) St Ives (5.4%) Great Paxton Village Centre (5.4%) Gamlingay Village Centre (5.4%)
Zone 8	Cambridge Historic Core (66.8%) St Ives (10.6%) Bourn Village Centre (4.6%)		

Note: Highest responses only

10.18 The patterns for those eating out in the daytime are broadly similar to those for the evening, albeit a greater proportion are staying 'closer to home'. Within core zones 1-4, 60.5% of residents are choosing to eat out during the daytime in the historic core, compared to 55.6% in the evening. In comparison, just 2.7% are choosing the Grafton Centre as a daytime eating destination.



10.19 Further afield, Table 10.3 below illustrates that the market share for the historic core is lower in Zone 5-11 for daytime eating out compared to evening eating out. Whilst the historic core remains popular, rather than travelling, the survey results demonstrate that a greater number of people are choosing to stay in their local villages or nearby town centres for daytime eating destinations; more so than for evening eating out. This is likely to be a consequence of geographic proximity and convenience.

**Table 10.3: Zone 5-11, Historic Core Market Share for Daytime and Evening Eating Out**

Zone	Historic Core Daytime Eating Out	Historic Core Evening Eating out
Zone 5	53.9%	56.4%
Zone 6	32.5%	47.0%
Zone 7	68.6%	75.9%
Zone 8	40.9%	66.8%
Zone 9	31.6%	35.1%
Zone 10	58.0%	53.5%
Zone 11	23.8%	16.1%

10.20 As you would expect for a regional city centre, the evening restaurant economy is driving visitor numbers across the wider Zone 1-11 study area to a greater extent than the daytime restaurant economy. This reflects the broader choice and quality of restaurant venues in Cambridge City Centre, attracting people from a large geographic area seeking a higher quality leisure experience.

### Cafes

10.21 Visiting cafes is the third most popular choice of leisure activity amongst those living in the survey area. Within the central zones 1-4, Cambridge historic core has a 56.4% market share, compared to just 3.5% for the Grafton Centre. Like restaurants, alternative destinations are scattered throughout peripheral areas on the outskirts of Cambridge, but Histon Village Centre (7.4%) and Mill Road (7%) are recorded as the most frequent choices after the historic core.

10.22 When analysing ‘cafes’ for the whole survey area, the historic core of Cambridge City Centre has a market share of 52.0%, compared to just 2.2% for the Grafton Centre. Table 10.4 identifies the most popular café destinations for those people living within Zones 5-11, and it is clear that Cambridge historic core is the most popular destination. The data also highlights a number of popular village centres for café visits, including Cambourne, Willingham, Linton and Sawston.

**Table 10.4: Café Choices Zone 5-11**

Zone	Locations	Zone	Locations
Zone 5	Cambridge Historic Core (50.4%) Sawston Village Centre (12.8%)	Zone 9	Cambridge Historic Core (58.9%) Newmarket (11.0%) Ely (7.3%)



Zone	Locations	Zone	Locations
	Great Shelford Village Centre (12.5%)		Bury St Edmunds (5.1%)
Zone 6	Cambridge Historic Core (38.0%) Royston (40.8%) Melbourn Village Centre (7.0%)	Zone 10	Cambridge Historic Core (47.5%) Saffron Walden (11.9%) Linton Village Centre (8.3%) Sawston Village Centre (5.9%)
Zone 7	Cambridge Historic Core (46.8%) Cambourne Village Centre (19.4%) Huntingdon (6.4%) Papworth Everard (5.0%)	Zone 11	St Neots (47.2%) Cambridge Historic Core (24.5%) Biggleswade Retail Park (8.6%)
Zone 8	Cambridge Historic Core (37.0%) Willingham Village Centre (20.6%) St Ives (16.1%)		Note: Highest responses only

### Public Houses (Pubs) and Bars

10.23 Visiting pubs and bars is the fifth most popular leisure activity for those living with the Cambridge sub-region. Within the central zones 1-4, less than half (46%) are visiting the historic core of Cambridge City Centre as their destination of choice for this activity. Alternative destinations include:

- Grafton Shopping Centre (3.7%);
- Histon Village Centre (10.2%);
- Mill Road (7.5%);
- Grantchester Village Centre (3.5%);
- Mitcham’s Corner (2.7%).

10.24 Cambridge historic core has the highest market share for pubs/bars across the full Zone 1-11 survey zone, recording a 53.5% market share. This compares well to the previous 2013 retail study, which recorded a lower market share of 46.3%. In comparison just 1.8% visit the Grafton Centre as their most frequent destination of choice. Table 10.5 sets out the most popular pub/bar destinations for those people living within Zones 5-11 and - like other leisure activities - Cambridge historic core is generally the preferred destination. The data does, however, highlight the popularity of a number of other town and village destinations within more localised catchment areas.



**Table 10.5: Pubs/Bars - Choices Zone 5-11**

Zone	Locations	Zone	Locations
Zone 5	Cambridge Historic Core (51.1%) Great Shelford Village Centre (11.6%) Sawston Village Centre (7.9%) Duxford Village Centre (5.8%)	Zone 9	Cambridge Historic Core (35.4%) Burwell Village Centre (10.7%) Waterbeach Village Centre (10.7%) Newmarket (7.8%)
Zone 6	Cambridge Historic Core (28.4%) Royston Town Centre (40.3%) Melbourn Village Centre (8.6%)	Zone 10	Cambridge Historic Core (42.3%) Linton Village Centre (18.4%)
Zone 7	Cambridge Historic Core (51.7%) Cambourne Village Centre (18.9%) Hardwick Village Centre (6.2%)	Zone 11	St Neots (28.9%) Cambridge Historic Core (14.5%)
Zone 8	Cambridge Historic Core (43.0%) Swavesey Village Centre (11.5%) Willingham Village Centre (11.4%) Boxworth Village Centre (6.6%)		

Note: Highest responses only

### Nightclubs

- 10.25 The nightclub industry has experienced a sharp decline in recent years, with over half of clubs closing down within a decade. This was partly attributed to the change of pub licensing laws in 2005, when pubs and bars could obtain licences to stay open later. This discouraged ‘moving on’ to the next venue once the pub had shut at 11am; with consumers able to stay in their pub and bar of choice until 12am or later.
- 10.26 More recently, nightclubs have not yet re-opened since the first Covid-19 lockdown in March 2020, and it is thought that for many the financial burden of closure will lead to many never re-opening. Aside from pub licenses and economic challenges, it is widely documented that ‘Generation Z’ – the younger generation that has never known a life without technology – are no longer



frequenting nightclubs as a staple weekend activity. There have been a number of growing trends in recent years:

- 'Generation Z' are more aware of healthy lifestyles, including lower alcohol consumption and healthier drinking and eating habits;
- Nightclubs are no longer the way to meet people. Meeting through friends and family, and online dating apps, is generally considered the preferred option;
- There is a lack of brand loyalty, with this generation not committing to visiting the same nightclub time and again, week in week out. Technology has opened the doors to different destinations and alternative leisure experiences;
- Millennials and Generation Z instead enjoy experiences from home, including take-aways, online movie streaming services, and luxury/varied drink offerings such as wine clubs, gin experiences and craft beer delivered straight to your door;
- The importance of 'human connection' has risen, with everyone so reliant on technology in their lives. When people meet up it is reported that they want to do it properly over a nice meal and conversation, with nightclubs not providing the right atmosphere or setting for this.

10.27 It is thought that there will always be a place for nightclubs in their current form, but perhaps fewer niche venues will specialise in becoming a 'clubbing paradise', whilst many others diversify instead to meet wider consumer needs. Hybrid venues are likely to rise in popularity, signalling a new era of nightclubs. Hybrid venues offer a daytime offering and nightlife scene too; from coffee and brunch in the morning through to cocktails and live music at night, extending the revenue period.

10.28 Cambridge city centre has always had an active nightclub scene, meeting the needs of local residents alongside students from more than one University. The household telephone survey results highlight the dominance of the Cambridge nightclub scene within the Cambridge sub-region, achieving a 91.9% market share across Zones 1-11. Central London/West End is the only other destinations cited by respondents, achieving a 16.2% and 37.5% market share in Zones 3 and 4. This is likely due to the direct trainline access from these central zones, alongside improved and safer trains.

10.29 The nightclub sector has, however, been directly impacted on by the Covid-19 pandemic and in some cases disputes over lease renewals. Popular nightclubs 'Fez' and 'Ballare' have both recently closed permanently (January 2021 and November 2020 respectively), leaving just 'Vinyl', Sidney Street and 'Lola Lo', Guildhall Place as the two traditional nightclub venues.

10.30 Societal trends and a deep commercial understanding of local markets will drive investment in any new nightclub venues in Cambridge City Centre. The composite analysis suggests that there is unlikely to be a need to plan for new nightclub venues over the plan period, but the replacement of lost facilities may be encouraged within this university city. A policy framework can manage the



introduction of new nightclub uses effectively – whether supporting or resisting – as they continue to fall under the ‘Sui Generis’ Use Classes classification. This is more often the remit of licensing as a consequence of potential noise and impact on residential amenity. Any applications should consequently be considered robustly on a case by case basis.

### Family Entertainment

- 10.31 Other commercial leisure facilities can be grouped together under family entertainment venues, and can include ice-skating rinks and tenpin bowling. More recently, new trends have emerged including trampoline parks and climbing venues, although – like the more traditional family entertainment venues – are generally located outside of town centres on retail parks or in industrial warehouse areas.
- 10.32 The telephone survey has identified the following dominant family entertainment venues in the sub-region, and records the most popular by market share:
- **Tenpin, Cambridge Leisure Park:** an out-of-centre tenpin bowling destination, with 28 bowling lanes, on-site bar, party deals, pool tables, table tennis, and karaoke booths (76.9% market share);
  - **Hollywood Bowl, Stevenage Leisure Park:** an out-of-centre tenpin bowling destination offering 28 lanes with VIP lane areas, a Hollywood licensed diner, and amusements (8.7% market share);
  - **Cambridge Ice Arena:** Situated off Newmarket Road the newly constructed Cambridge Ice Arena opened in August 2019. The state-of-the art facility contains a full sized ice-rink operated by the leisure and cultural social enterprise GLL, under its ‘Better’ brand on a 26-year lease. It offers activities including ice hockey, curling, figure skating, and parties. The venue is home to the Cambridge University Ice Hockey team. The venue has a 6.7% market share;
  - **Eat N Bowl, St Neots:** an out-of-centre tenpin bowling destination, offering 16 bowling lanes, children’s soft play, and licensed bar area (4% market share);
  - **Clip ‘N’ Climb, Clifton Road Industrial Estate, Cambridge:** an indoor climbing wall facility for age 4 upwards (1% market share).
- 10.33 Nationally, trampoline parks have become very popular representing a strong growth sector, doubling in number every year since 2013. Venues are located in nearby towns including St Neots and Stevenage, for example, but there are not yet any such venues in and around Cambridge. They require large spaces and are normally suited to out-of-centre industrial warehouse areas and retail parks, for example.
- 10.34 In respect of tenpin bowling, trend analysts report that the industry is currently half way “on a journey between the old-style bowling alley and its hoped-for new destination as a modern, multi-generational entertainment centre providing a light-hearted competitive social experience, where bowling is increasingly



blended with other forms of activity alongside an enhanced dining offer". Newer models – more suited to town centre locations – include themed boutique style venues, karaoke booths, virtual cricket nets, licensed bars and Hollywood themes, and include operators such as All Star Lanes.

- 10.35 The industry reports that 'what's old is new again', from vinyl records to drive-in theatres, highlighting the current trend that 'sometimes it's just fun to go retro'. This is particularly the case with boutique bowling alleys, which offer a strong mix of fun and attractions. People are looking for places to go where they can be interactive with their friends, family, and colleagues that are outside of a traditional bar or restaurant setting. Boutique bowling alleys 'combine an iconic game with great food and drinks to create a destination that fills that niche market'.
- 10.36 We note that there are no more modern luxury 'boutique' bowling venues in Cambridge, such as All Star Lanes. These offer American style venues, high quality bars, restaurants, karaoke booths and private party rooms. These can often be located in town and city centre locations, drawing customers from wide catchment areas with linked trip benefits for nearby restaurants, bars and hotels. They often complement multiplex venues such as Hollywood Bowl and Tenpin, and in the context of closing nightclubs, Cambridge may wish to consider facilitating the introduction of this type of alternative, quality venue over the plan period.
- 10.37 Traditionally located in out-of-centre destinations, the newer boutique bowling model is particularly well-placed to merge with existing retail and town centre locations. In difficult retail markets, developers are seeking to expand their leisure offering (beyond food and beverage) to create a wider customer experience, increasing footfall and extending dwell time. Boutique bowling alleys are well positioned to capitalise on this trend to help diversify town centres. This is an opportunity in the Cambridge market that could be encouraged over the plan period.

### Cultural/Arts Venues

- 10.38 The majority of respondents to this question cited Cambridge as their preferred destination for cultural and arts venues including theatres, museums and art galleries, with a strong market share across Zones 1-11 (78.3%).
- 10.39 The main **theatres** in Cambridge include the 670 seat Cambridge Arts Theatre, the 300 seat Cambridge University ADC Theatre on Park Street and the 270 seat Mumford Theatre within Anglia Ruskin University. All offer tiered seating in a traditional theatre setting.
- 10.40 There are three main **concert venues** in Cambridge including the Cambridge Corn Exchange on Wheeler Street, West Road Concert Hall on West Road, and The Junction on Clifton Way. Trinity College Chapel and Kings College Chapel are also important concert venues within the city.
- 10.41 There are a number of museums in Cambridge including:
- Cambridge and County Folk Museum;



- Cambridge Museum of Technology;
- Fitzwilliam Museum;
- Kettles Yard Museum and Gallery;
- Scott Polar Research Institute;
- Sedgwick Museum of Archaeology and Anthropology;
- University Museum of Classical Archaeology;
- University Museum of Zoology;
- Whipple Museum of the History of Science.

10.42 With the combined resources of the Universities, Cambridge has an extensive provision of museums including several which are globally renowned – the Sedgwick Museum of Earth Sciences, The Whipple Museum of the History of Science, the Museum of Archaeology and Anthropology, the Museum of Zoology and the Scott Polar Institute. Previous **Cultural Strategies** prepared by Cambridge City Council emphasise that this is a strength that the city can exploit.

10.43 The city also has a good provision of **Art Galleries**, including:

- Kettle’s Yard, Castle Street;
- Clare Hall Gallery, Herchel Road;
- The Ruskin Gallery at Cambridge School of Art;
- The New Hall Art Collection.

10.44 Outside of core zones 1-4, Central London/West End does increase its market at the expense of Cambridge, although Cambridge did remain the most frequently visited destination across every survey zone (Table 10.6).

**Table 10.6: Most Visited Destination for Arts and Culture**

Zone	Cambridge	Central London/West End
Zone 1	84.3%	6.2%
Zone 2	83.5%	15.5%
Zone 3	91.5%	4.1%
Zone 4	85.5%	8.7%
Zone 5	73.7%	20.7%
Zone 6	65.0%	24.7%
Zone 7	77.0%	16.5%
Zone 8	84.9%	9.7%
Zone 9	71.8%	15.9%
Zone 10	59.6%	26.0%
Zone 11	51.5%	21.8%



## 11. Conclusions & Recommendations

11.1 This section will be completed to inform the Draft Local Plan and will include:

- Identification of retail and leisure needs
- Assessment of sequential sites
- Needs of strategic developments
- Impact assessment thresholds
- Development management / policy advice