

North East Cambridge (NEC)

Retail/Town Centre Evidence Base Study

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Introduction

Background

1. Cambridge City Council and South Cambridgeshire District Council (the Councils) are currently preparing an Area Action Plan for North East Cambridge which will form part of the development plan for Greater Cambridge. The Councils held an Issues and Options Area Action Plan consultation in 2019, followed by the publication of the Draft North East Cambridge Area Action Plan (Draft Area Action Plan) (Regulation 18 consultation). The Draft Area Action Plan was consulted upon between 27th July and 5th October 2020.
2. Urban Shape have been instructed by ‘the Councils’ to prepare the Greater Cambridge Retail and Leisure Study to inform the emerging Joint Local Plan and the North East Cambridge Area Action Plan. The Draft Area Action Plan recognised that the intensification of employment use and substantial new housing will drive a need for new provision. The Retail Town Centre Evidence Base Study, February 2020 was based on the assumed development mix and Spatial Framework in the Draft Area Action Plan. This document is an update to that 2020 report, based upon the revised 2021 Spatial Framework and draws on evidence collated, and focuses on the North East Cambridge area, setting out the required response to the Study Brief in order to inform the next stage of the Area Action Plan.
3. Based on sound evidence, we advise on the scale and mix of retail and leisure floorspace within the North East Cambridge, addressing the opportunities and challenges for the site and identifying how provision will relate to existing town centres and also the needs of surrounding existing communities.
4. We provide conclusions on the most appropriate scale of retail and leisure floorspace to ensure the new development meets the needs of the emerging new community whilst seamlessly integrating into the existing network and hierarchy of centres. The Councils require this piece of work to provide assurance that the new centre uses and retail floorspaces will support the daily needs for people living, working and studying at North East Cambridge without having a detrimental impact on existing centres. The outputs provide recommendations in respect of retail policy to inform preparation of the preferred option Area Action Plan.

Site and Surrounding Area

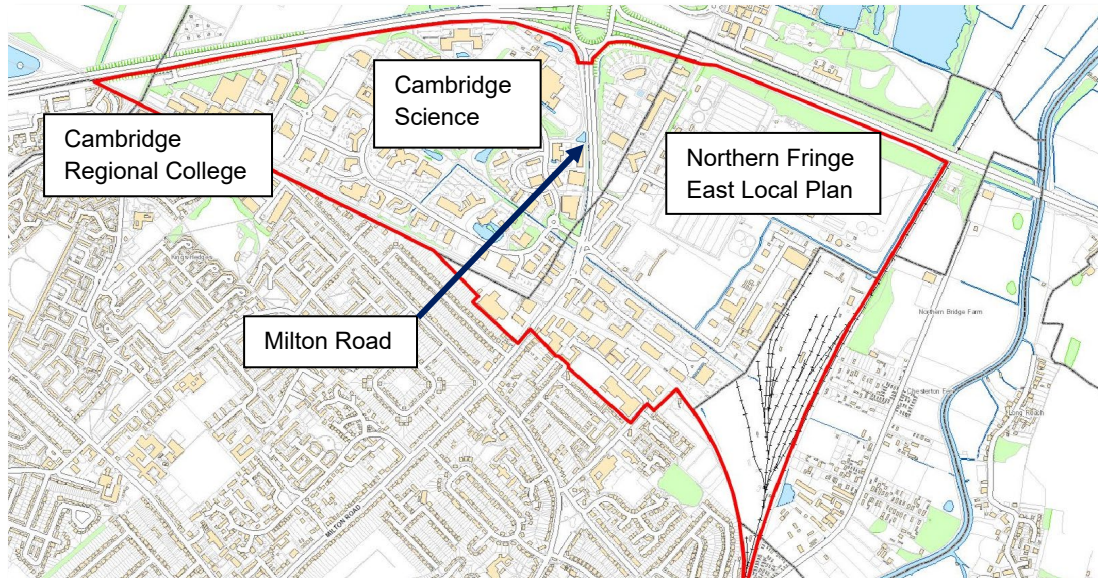
5. North East Cambridge is situated between the A14 to the north, the Cambridge to King's Lynn railway line to the east, and the Chesterton, Arbury and Kings Hedges residential areas to the south (Fig.1.1). It is bisected by Milton Road, which then continues north as the A10 towards Ely and Kings Lynn. It is approximately 3km from Cambridge City Centre. Milton Country Park, which provides access to woodlands and lakes, as well as a visitor centre and children's play areas, is located across the A14 to the north. The River Cam corridor, to the east of North East Cambridge, includes walking and cycling opportunities.

Figure 1.1: North East Cambridge Location Context Plan



6. The boundary of North East Cambridge has evolved over time, but now includes the Cambridge Northern Fringe East Local Plan allocation, Cambridge Science Park and Cambridge Regional College (Fig.1.2). The boundary crosses the administrative boundary of Cambridge City Council and South Cambridgeshire District Council (see Figure 1.9 later in report).

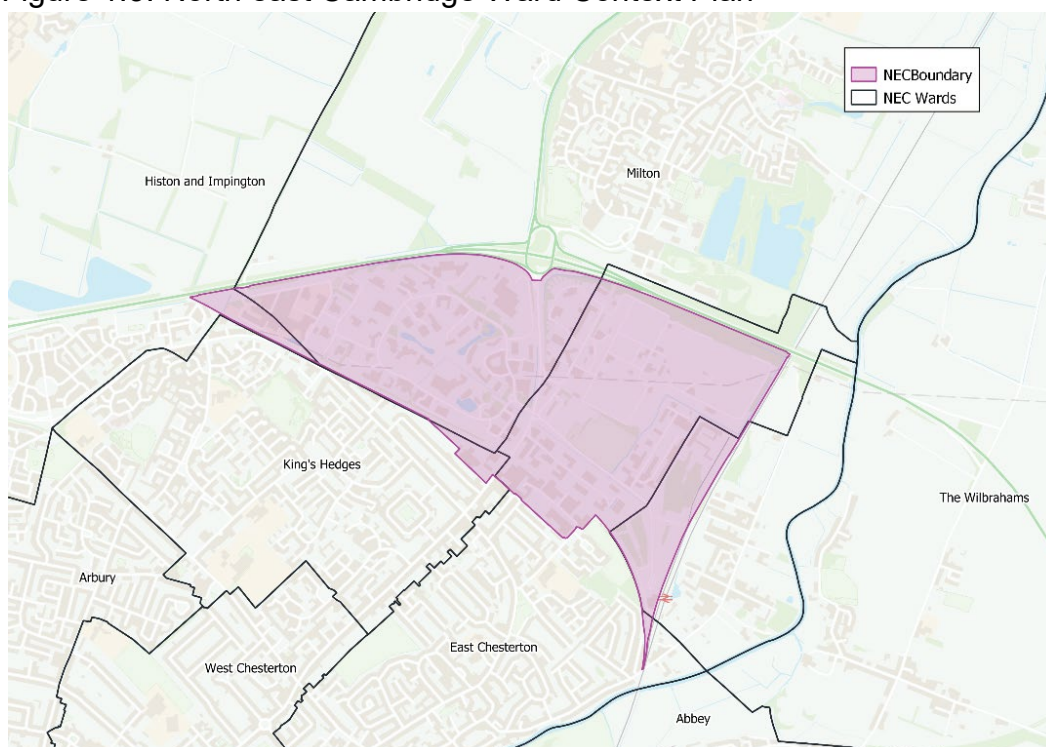
Figure 1.2: North East Cambridge Boundary Plan



7. Existing land uses were identified in the earlier 2019 Issues and Options document as follows:
- A) Anglian Water's Water Recycling Centre, 38.6ha;
 - B) Cambridge North Station, 8.36ha (opened 2017, and adjoining hotel, now complete);
 - C) Chesterton Rail Sidings, 13.19ha;
 - D) Former Park & Ride, 6.45ha (became vacant when new site created north of the A14);
 - E) Cambridge Commercial Park/Cowley Road Industrial Estate, 7.8ha (low-density industrial and commercial uses and a bus depot);
 - F) St John's Innovation Park, 9.53ha (serviced office space/innovative clusters housing over 80 companies);
 - G) Cambridge Business Park, 9.43ha (12 office technology buildings, gated site, no permeability);
 - H) Nuffield Road Industrial Estate and Trinity Hall Farm Industrial Estate, 6.36ha (industrial/manufacturing businesses, open storage/car repair activities);
 - I) Orwell Furlong, 1.84ha (small office and industrial units);
 - J) Open space alongside the Cambridgeshire Guided Busway, 3.25ha (includes Bramblefields Local Nature Reserve and Nuffield Road allotments);
 - K) Cambridge Science Park, 61.9ha (located west of Milton Road, it has been a successful part of the Cambridge economy since the 1970's. Range of science and technology-based industries, with a range of

- supporting facilities. Planning permission granted for some buildings to be demolished and replaced with new more intensive commercial buildings);
- L) Cambridge Regional College (CRC), (further and higher education facility with a catchment including Cambridgeshire, Essex, Hertfordshire and Suffolk. The existing CRC site supports 9,000 full-time further and higher education students.
8. The majority of the proposed residential development and intensification of existing employment centres are not expected to start until the existing on-site Waste Water Recycling Centre (WWRC) has been relocated. This is expected to take place over the next 5-10 years.
9. Adjoining North East Cambridge, to the east of the railway line, there are a number of Gypsy and Traveller sites located along Fen Road. Of the three wards adjoining the site, two fall within the twenty most deprived wards in Cambridgeshire in terms of indices of multiple deprivation, namely the King's Hedges and East Chesterton wards (Fig.1.3).

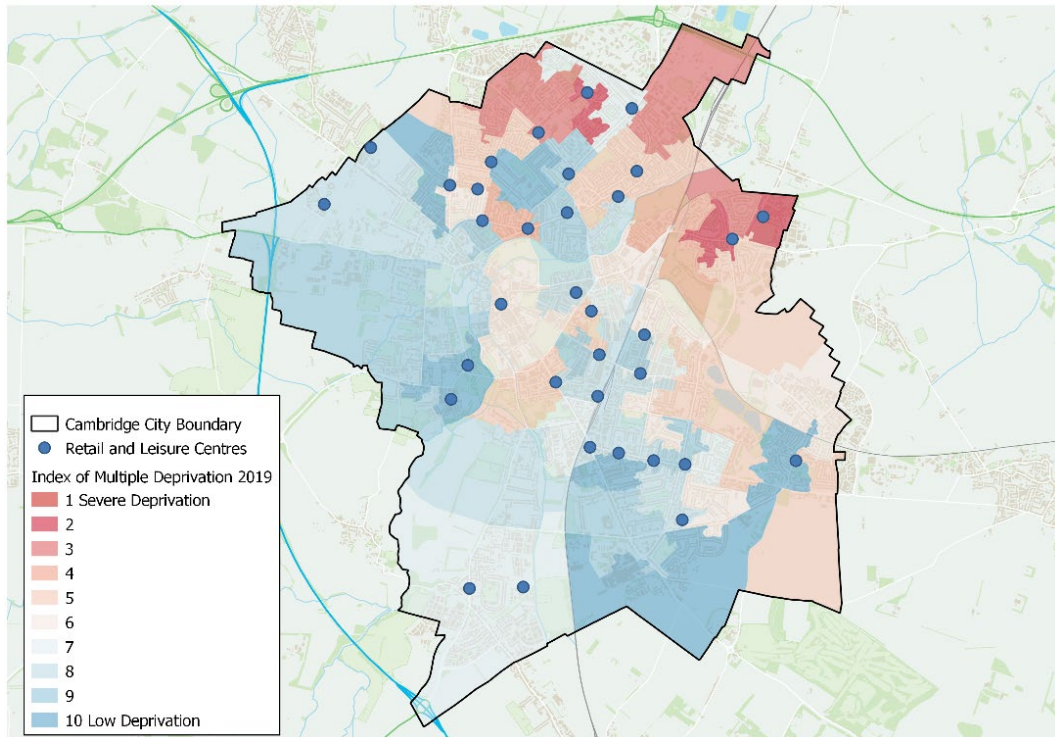
Figure 1.3: North east Cambridge Ward Context Plan



Note: Three Wards boarder North East Cambridge: King's Hedges, East Chesterton, Milton

10. The [Retail and Leisure Study - Baseline Report 2021](#) evidence document, prepared to support the emerging Greater Cambridge Local Plan, confirms the high levels of deprivation in and around the North East Cambridge area. Figure 1.4 below illustrates the high levels of ward deprivation compared to the wider Cambridge City authority area.

Figure 1.4: Cambridge City Authority, Multiple Deprivation by Ward



11. Land uses to the south of the A14 are predominantly residential in character with employment and industrial areas in and around North East Cambridge. To the north of the A14 lies the village of Milton, 0.8km north of North East Cambridge (Figure 1.5) with an out-of-centre Tesco food superstore and Milton Country Park.

Figure 1.5: North East Cambridge Surrounding Land Use Context/Character



Transport and Movement

12. North East Cambridge benefits from a range of existing walking and cycling, public transport and road connections. In terms of cycling and walking, there are a range of routes available from the area towards destinations in Cambridge. The area is also connected to Milton via the Jane Coston Bridge, and to St Ives on the Guided Busway. The quality of existing routes is mixed. There are severance issues in a range of places, which make moving within and beyond the North East Cambridge area more challenging, such as difficulties in crossing Milton Road, the boundaries of business parks and their lack of permeability, the A14 and the railway line.
13. There are also existing public transport connections. Cambridge North Station opened in May 2017, providing services to London, Ely, King's Lynn and Norwich. The Cambridgeshire Guided Busway provides access to Cambridge Science Park and links to Cambridge North station. There are also other existing local bus connections that focus on providing north-south connections on Milton Road. South of Butt Lane to the west of Milton is the Milton Park and Ride site. We understand from data held by the Council that the transport and road networks are working at full capacity and as a result, a trip budget approach is being applied to future development at North East Cambridge. It will therefore be important to internalise activities within North East Cambridge whilst also limiting car parking for all development uses to ensure vehicle movements do not exceed the trip budget.

The Vision

14. The Draft Area Action Plan presents the vision for North East Cambridge as follows:

“We want to create an inclusive, walkable, low-carbon new city district with a lively mix of homes, workplaces, services and social spaces, fully integrated with surrounding neighbourhoods.”
15. The extent and ambition for the area’s regeneration has grown over time following the confirmation of the Housing Infrastructure Fund (HIF) bid to relocate the Waste Water Treatment Plant to an off-site location. Combined with the delivery of significant new transport infrastructure serving North East Cambridge, there is now an opportunity to realise comprehensive regeneration which can deliver a balance, mixed and self-sustaining new city district. North East Cambridge is planned around walking, cycling and public transport first, discouraging car use, in order to address climate change and not exceed the trip budget for the site.
16. Key objectives presented in the 2019 Issues and Options and 2020 Draft Area Action Plan include the aspiration to bring together a diverse range of business and employment opportunities, education and training, living options, and retail and recreation in a vibrant, safe and integrated mixed-use district. North East Cambridge is intended to demonstrate resource efficiency through net zero carbon living, walkable districts, sustainable transport modes, a new model for low car dependency living, and integration with surrounding communities spreading the benefits of development beyond the AAP boundary.
17. Development is intended to support the knowledge economy of Cambridge with a local and global reach. It will provide a layered economy that includes large, small and start-up businesses, facilitating collaboration with educational institutions and businesses, and supported by a range of other community facilities including cafes, leisure, hotels and service providers. North East Cambridge will make a significant contribution to the housing needs of the Greater Cambridge area including affordable housing by providing a range of housing types and tenures.
18. North East Cambridge will promote legibility centred around new centres of activity and focussed on a new green space network and sustainable transport infrastructure. The whole of the Area Action Plan area is within a 10-minute cycle ride or a 30-minute walk from Cambridge North station. The

street network will not only form an important part of the public realm and sense of 'place' but it will also enable a seamless transfer from public transport to walking, cycling and other forms of micro-mobility. The Draft Area Action Plan includes new and improved crossings across Milton Road, the A14, the Guided Busway and other major routes, linking surrounding neighbourhoods with the new ones that will be forming.

19. The Draft Area Action Plan emphasises the importance of improved linkages from the North East Cambridge area to the existing residential communities in King's Hedges and East Chesterton Wards to the south of the regeneration area. This will include safe pedestrian and cycle access.

Planning Policy Framework

National Planning Policy Framework

20. The Draft Area Action Plan references the National Planning Policy Framework (NPPF), stating that the document must be consistent with national policy prepared by the Government. The most recent NPPF (July 2021) identifies a range of social, environmental and economic policies that will need to be considered.
21. Of relevance to this retail report/evidence base, Section 8 promotes healthy, inclusive and safe places which promote social interaction, including opportunities for meetings between people who might not otherwise come into contact with each other – for example, through mixed-use developments, strong neighbourhood centres, street layouts that allow for easy pedestrian and cycle connections, and active street frontages (para.92(a)).
22. Paragraph 92(c) adds that places should enable and support healthy lifestyles, especially where this would address identified local health and well-being needs – for example through the provision of safe and accessible green infrastructure, sports facilities, local shops, access to healthier food, allotments and layouts that encourage walking and cycling.
23. Paragraph 93 emphasises that to provide the social, recreational and cultural facilities and services the community needs, planning policies and decisions should plan positively for the provision and use of shared spaces, community facilities (such as local shops, meeting places, sports venues, open space, cultural buildings, public houses and places of worship) and other local services.
24. Section 5 addresses the supply of new homes, clarifying that the supply of large numbers of new homes can often be best achieved through planning for larger scale development, such as new settlements, provided they are well located and designed, and supported by the necessary infrastructure and facilities (Para.73). Policy-making authorities are encouraged to ensure that their size and location will support a sustainable community, with sufficient access to services and employment opportunities.
25. Section 7 aims to ensure the vitality of town centres with planning policies encouraged to support the role that town centres play at the heart of local

communities, by taking a positive approach to their growth, management and adaptation. Planning policies should define a network of and hierarchy of town centres and promote their long-term vitality and viability. Policies should allow them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, and allow a suitable mix of uses (including housing) and reflects their distinctive characters.

26. Paragraph 86b adds that planning policies should define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre.

Local Plan Policies

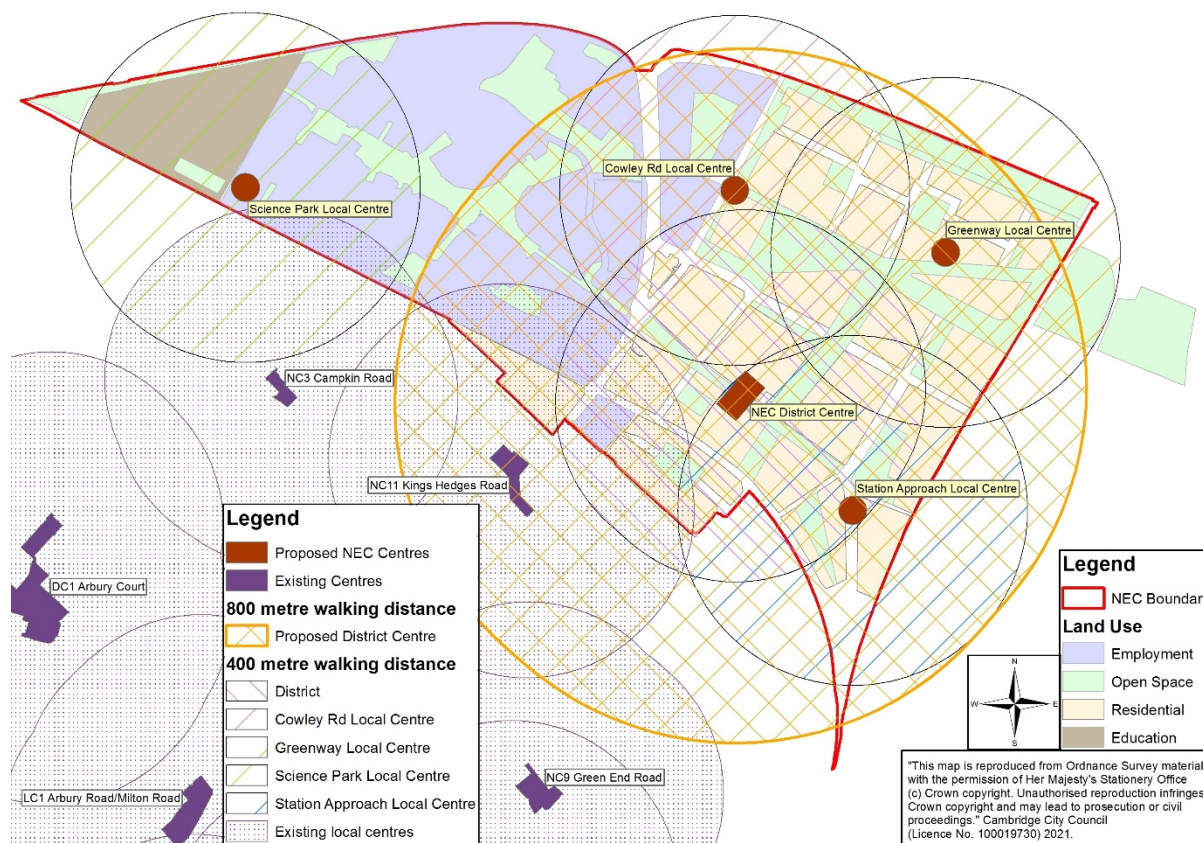
27. Both Councils adopted new Local Plans in 2018. These allocate a range of major development sites in the Greater Cambridge area, including North East Cambridge, which crosses the administrative boundary of Cambridge City Council and South Cambridgeshire District Council. Both Councils have included a policy on North East Cambridge within their local plans; Cambridge City Council (Policy 15) and South Cambridgeshire District Council (Policy SS/4). At that time, the North East Cambridge boundary was constrained to just Cambridge Northern Fringe East (see paragraph 5, above), the majority of which lies within Cambridge City Council.
28. The policies allocate the area for a high-quality mixed-use development with a range of supporting uses, and state that the jointly prepared Area Action Plan will determine site capacities, and the viability, phasing and timescales of development. The policy wording is consistent in both local plans, and confirms the focus on employment use (B1/2/8) at that time, with other uses (commercial, retail, housing, leisure) to be 'supporting' uses. As the boundary has evolved and broadened, residential development has become a larger focus of the emerging Area Action Plan, and an opportunity to help meet the housing needs of the Greater Cambridge Area. This will be reflected in the early review of each respective Local Plan which commenced in 2019.

Retail and Leisure Floorspace

Retail and Leisure at North East Cambridge

29. Being primarily an employment area, the current North East Cambridge area has little by way of existing retail or local services. The revised Spatial Framework 2021 recognises that the intensification of employment use and substantial new housing will drive a need for new provision.
30. North East Cambridge provides an opportunity to deliver new shops, services and infrastructure that can offer opportunity and improve amenities in this part of Cambridge. The form and function of this requires careful consideration; the quantity and type of retail and leisure provision should fully meet local needs (residents, businesses and visitors) but should not emerge as a 'destination' seeking to compete with the City Centre, which will continue to provide higher order services and facilities for this new community (Draft Area Action Plan, Section 6.4).
31. The Draft Area Action Plan identifies that such centres can help provide a focus for community, cultural and civic life. To fulfil this function, it is emphasised that they will need to be welcoming, attractive, vibrant and inclusive, adding to the character and appreciation of North East Cambridge, rather than becoming another indistinguishable generic local centre or shopping parade. In this respect, a mix of unit sizes should be provided to cater for both national as well as independent traders and should enable a diverse range of retail and leisure uses, including shops, local small supermarkets, bars, cafes, and restaurants, as well as public and private sector services.
32. Additional information provided by the Councils identifies the broad locations of the new centres within North East Cambridge. These include a larger district centre towards the centre of North East Cambridge and four local centres: Station Approach, Cowley Road, Greenway and Science Park (Figure 1.6, below). The centres' indicative locations and distribution across the area will provide good access to a broad range of retail and leisure services across North East Cambridge. The following sections of this report provide the robust and sound evidence and analysis to inform policy recommendations in respect of the appropriate scale and mix of retail and leisure uses across each of these four locations.

Figure 1.6: North East Cambridge Proposed Town Centre Locations



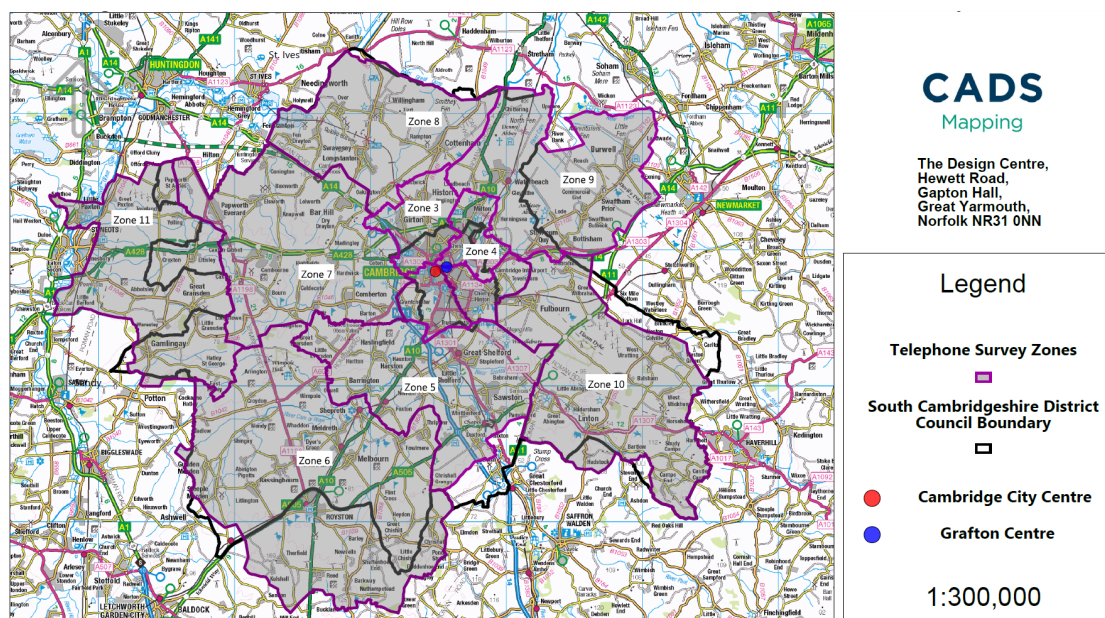
33. The following sections identify and describe the evidence that has been commissioned, analysed and drawn upon to inform both the Retail and Leisure Study and the North East Cambridge Area Action Plan; sets out the qualitative local retail context within which the new town centres will sit; and provides a quantitative analysis of spend forecasts being driven by the existing catchment, and employment, educational and residential development. This exercise will provide floorspace thresholds for new town centre development, and – incorporating a commercial sense check – the outputs advise on mix and upper thresholds of unit number/size necessary to ensure local and district centre allocations once complete.

Household Telephone Survey

34. A new Household Telephone Survey was undertaken in November 2019 in order to identify patterns of food and non-food shopping, and commercial leisure activities. The survey interviewed 1,100 residents across 11 survey zones (Fig.1.7, below), with 100 of these interviews being undertaken ‘on-street’ in Cambridge City Centre in order to capture the shopping habits of

students who rarely have land-line telephones installed in student accommodation.

Figure 1.7: Greater Cambridge Household Telephone Survey Area

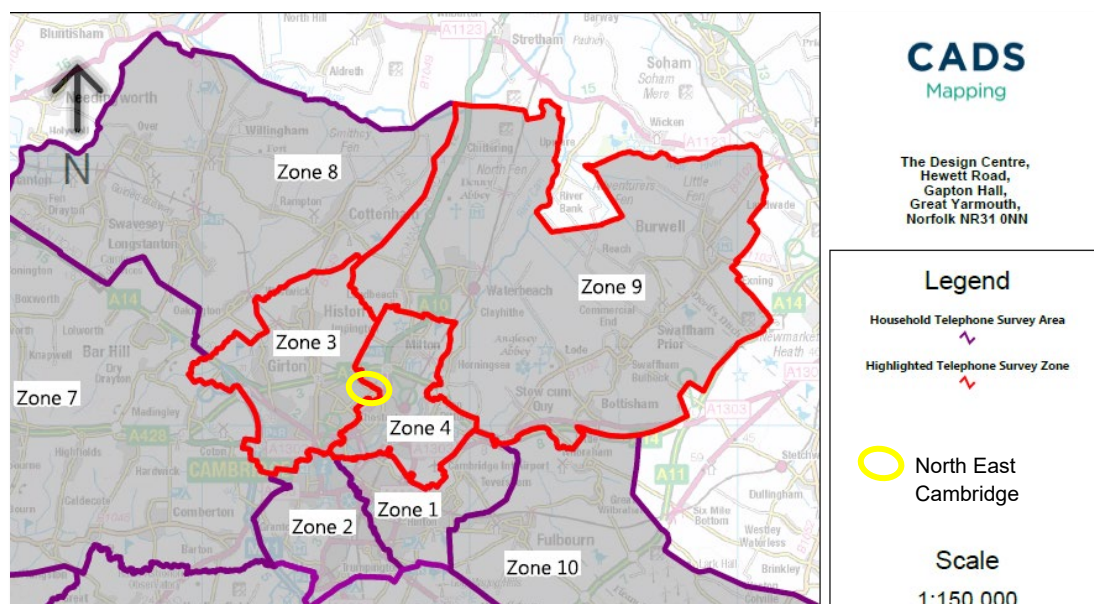


35. The outputs from the telephone survey enable the identification of shopping patterns, catchment areas, trade retention and leakage and the performance of retail floorspace by town centre and 'other' destinations (including out-of-centre food stores). This is a key input to the wider Greater Cambridge Retail and Leisure Study currently being prepared.
36. Of relevance to North East Cambridge, the results identify where existing residents in the local vicinity are undertaking their food and non-food shopping, and which town centres they are visiting for their local shopping goods. It is important to understand the current retail context to understand how those living and working in North East Cambridge might shop, and where they might travel to access different types of goods that are not available within the newly created town centres. The survey results provide a robust comparable source to inform these conclusions.
37. The Area Action Plan 'vision' is to provide local day-to-day shopping and service requirements, rather than the creation of a 'destination' seeking to compete with the City Centre. The City Centre will continue to provide higher order services and facilities for this new community (p178, Draft Area Action Plan). North East Cambridge residents will travel to alternative destinations for their higher order and main shopping trips. Nevertheless, in an emerging new community, driven by low car dependency, the ability of residents and

other members of the community to access key local shops, services and main foodstore destinations will be important considerations. The analysis will help us understand what geographical area the catchment is likely to comprise – including those living adjoining and beyond North East Cambridge.

38. For the purposes of the North East Cambridge analysis, the focus on local shopping patterns is limited to Zones 3 and 4 (Figure 1.8 following page), and more specifically those in King’s Hedges and East Chesterton wards. This area reflects the broad geographical catchment and localised retail context within which North East Cambridge will be located according to the ‘meeting local needs/day-to-day shopping’ vision. North East Cambridge is located on the boundary of Zones 3 and 4 (Figure 1.8 below).

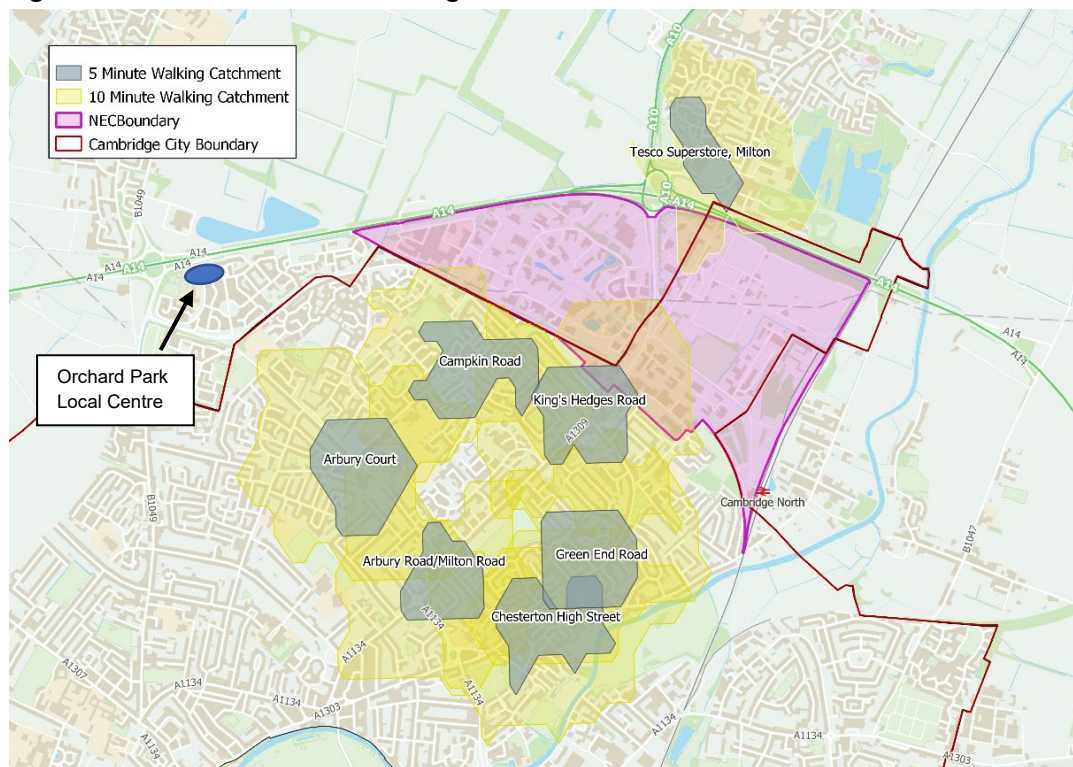
Figure 1.8: Zone 3 and 4 – The North East Cambridge Catchment



Local Retail Context

39. Figure 1.9 below illustrates those centres and main out-of-centre food superstores in close proximity to North East Cambridge. Campkin Road and King’s Hedges are defined as neighbourhood centres in the Cambridge City Local Plan and are closest in distance to North East Cambridge. The 5- and 10-minute walk-in catchment area of Campkin Road borders North East Cambridge, and King’s Hedges Road 10-minute walk-in catchment area overlaps with North East Cambridge. The 10-minute walk-in catchment of the out-of-centre Tesco food superstore at Milton does overlap marginally with North East Cambridge aided by the A14 footbridge; existing connectivity between the store and North East Cambridge is established.

Figure 1.9: North East Cambridge Local Retail Context



40. In the context of the vision for North East Cambridge, the walk-in catchments of Campkin Road and King's Hedges Road neighbourhood centres will likely evolve to overlap further with North East Cambridge following improved connectivity and linkages with these existing neighbourhoods. This is consistent with the Area Action Plan vision to improve connectivity to adjoining, existing neighbourhoods in a north/south direction – across the guided busway.
41. Orchard Park local centre is small in scale, with 7 units occupied by a charity shop, estate agent, barbers, Pizza Hut and a small convenience store shortly to be occupied by Tesco Express. The local centre is separated from the study area, serving a small local community to the north west. It is unlikely to have any influence on the shopping patterns of those living/working in North East Cambridge or King's Hedges Ward and has been excluded from this analysis.
42. Arbury Court district centre, Arbury Road/Milton Road local centre, Chesterton High Street neighbourhood centre and Green End Road neighbourhood centre are located further afield, c.25-30 minutes walking distance from North East Cambridge. To the north of the A14 is Milton village centre, although this is separated in connectivity by the main road and has a limited level of

provision. North East Cambridge will promote a new underpass is being promoted, this is more for linking to Milton Country Park and Waterbeach via the proposed Greenway rather than to Milton Village, access to which will continue to be via the Jane Coston Bridge. This means Milton village centre will not be within a reasonable walking distance of the main residential areas at North East Cambridge. Future residents are therefore unlikely to look at these existing, alternative destinations for their local shopping requirements.

43. The shopping and service offer adjoining the North East Cambridge boundary in Campkin Road neighbourhood centre and King's Hedges neighbourhood centre is limited. Campkin Road has a Tesco Express convenience store and a Chinese take-away outlet, and King's Hedges has a Co-Op convenience store. This offer is important to immediately adjoining existing residents but will not meet the needs of a new residential and employment community in North East Cambridge, particularly given the barrier of the east/west guided busway.
44. Existing residents in King's Hedges and East Chesterton wards lie broadly equidistant between North East Cambridge and the larger centres of Arbury Court District Centre and Arbury Road/Milton Road Local Centre. These two centres can be reached within a short 10-minute walk from both wards in the opposite direction to North East Cambridge.
45. They both have around 20 units with the district centre anchored by Budgens and the local centre anchored by a small Co-Op convenience store. Complementary uses include take-aways, pharmacy, café, hairdressers, florist, carpets and flooring, garment repairs, pc repairs and betting shops, for example. Arbury Court has a Post Office, butchers, library and greengrocers, bakers, bike shop, locksmiths and dog grooming parlour. Many everyday requirements are met, more so in Arbury Court District Centre.
46. Residents of King's Hedges and East Chesterton ward will have the choice of travelling in both directions for their shopping and service needs, and their destination of choice will depend on proximity, mix and quality of offer in North East Cambridge, and improved accessibility to North East Cambridge across the guided busway.

Main Food Superstore Provision

47. Table 1 below sets out the indicative travel times from North East Cambridge to the closest main food stores on foot, by bicycle and in a car. The closest main food stores to North East Cambridge all occupy out-of-centre locations within a 15-minute drive-time. The furthest main food store is within an approximate 15-minute cycle ride and a 40-minute walk. The Chisholm Trail, currently under construction will improve access between North East Cambridge and Newmarket Road where several food stores are located including the Tesco Superstore, on Cheddars Lane and Asda, at the Beehive Centre.

Table 1: Indicative travel times (in minutes) from North East Cambridge to the closest main food stores

Destination	Walking	Cycling	Drivetime
Tesco Superstore, Milton	15	5	5
Aldi, Histon Road	40	15	10
Tesco Superstore, Cheddars Lane	30	5-10	10-15
Asda, Beehive Centre	35-40	10	10-15

48. The main food stores' location and proximity to North East Cambridge are illustrated in Figure 1.10 below. In the absence of such provision in the North East Cambridge, residents are likely to choose to travel to one of these destinations which are closest, unless they have an operator preference for an alternative. If that is the case, Little Waitrose is located in the Grafton Centre and the closest Sainsbury's store is located at Sidney Street.

Table 2: Zone 3 Main Food Shopping Patterns

Destination	Zone 3 Market Share
Tesco Superstore, Milton	38.5%
Aldi, Histon Road	17.3%
Tesco Extra, Bar Hill	8.4%
Tesco Superstore, Cheddars Lane	7.5%
M&S, Beehive Centre	3.8%
Asda, Beehive Centre	3.6%

Source: Household Telephone Survey, November 2019

Table 3: Zone 3 Top-Up Food Shopping Patterns

Destination	Zone 3 Market Share
Tesco Express, High Street, Histon	17.1%
Co-Op, Station Road, Histon	13.2%
Budgens, Arbury Court	11.5%
Tesco Express, Campkin Road	10.9%
Aldi, Histon Road	7.3%
Co-Op, Histon Road	4.4%

Source: Household Telephone Survey, November 2019

51. Tables 4 and 5 below set out the shopping patterns of those living within Zone 4 for their main food and top-up food shopping. The Tesco superstore at Milton is the second most popular destination for main food shopping and top-up food shopping, and the Co-op store in Arbury Road/Milton Road Local Centre is popular for top-up food shopping.

Table 4: Zone 4 Main Food Shopping Patterns

Destination	Zone 4 Market Share
Tesco Superstore, Cheddars Lane	27.2%
Tesco Superstore, Milton	21.7%
Sainsbury's Superstore, Coldhams Lane	12.9%
Asda, Beehive Centre	10.6%
Aldi, Histon Road	7.7%
Co-Op, Arbury Road/Milton Road	3.0%

Source: Household Telephone Survey, November 2019

Table 5: Zone 4 Top-Up Food Shopping Patterns

Destination	Zone 4 Market Share
Tesco Superstore, Cheddars Lane	15.0%
Tesco Superstore, Milton	11.9%
Sainsbury's Superstore, Coldhams Lane	10.0%
Aldi, Histon Road	9.0%
Co-Op, Arbury Road/Milton Road	7.0%
Co-Op, Chesterton Road	3.3%

Source: Household Telephone Survey, November 2019

52. Depending on provision in the North East Cambridge area, it is likely that the new North East Cambridge population could look to the Tesco store at Milton for their main food shopping requirements, and possibly even their top-up food shopping. Of those centres closest to North East Cambridge, the Tesco Express at Campkin Road is popular for top up food shopping for those living in Zone 3, but the Co-Op at King's Hedges Neighbourhood Centre has a much lower response rate.
53. The quantitative analysis of the Tesco Superstore at Milton has identified the store to be substantially over-trading by c.£12m. Impact on this out-of-centre destination is not a material planning consideration, but its performance demonstrates it to be a good performing store with a substantial level of customer loyalty/market share across this part of the local catchment area.

North East Cambridge Population Growth

54. When considering the scale and type of retail to be implemented within North East Cambridge, it is first necessary to understand the scale of population that the newly defined town centres will be serving. This will include residential, employment, student and existing neighbouring communities.
55. Residential mix is set out in Table 6 below, highlighting the predominantly flatted development (94%), with a smaller number of 3 and 4-bed houses (6%). The proposed number of residential units within the whole North East Cambridge area will be circa 8,350, equating to a total population of 16,362 people.

Table 6: North East Cambridge Residential Housing Mix and Total Unit Count

Type	Total Units	% of Total
1 Bed Flat	2,673	32.0%
2 Bed Flat	4,773	57.20%
3 Bed Flat	434	5.20%
4 Bed Flat	0	0.00%
2 Bed House	141	1.70%
3 Bed House	282	3.40%
4 Bed House	47	0.60%
Total units	8,350	100%

Source: Greater Cambridge Councils

56. There will also be considerable employment growth across North East Cambridge, with an additional 15,700 new jobs in addition to the 12,000 currently on site. Total employment numbers will equate to around 27,700.
57. The Cambridge Regional College, located to the west of the North East Cambridge area, currently supports 9,000 full-time further and higher education students every year (<https://www.camre.ac.uk/about/>). Around 80% (7,200) of students are located at the Cambridge King's Hedges campus within North East Cambridge, whilst 20% are located some distance away in Huntingdon. The closest town centre for the Cambridge campus students is currently Orchard Park, but this is limited in scale and offer, and students will almost certainly choose new facilities within North East Cambridge for their retail/shopping requirements once open.
58. Student spending potential and wider shopping and leisure requirements should be taken into consideration when forecasting retail floorspace need/supportable space. We note, however, that many are evening class or part-time students and only a small proportion of their spend should be taken into consideration when forecasting 'need' for new retail floorspace. In these circumstances, we have assumed that around half of students (3,600) may visit and spend in the new district and local town centres within North East Cambridge.

59. Earlier in this report, it has been assumed that a proportion of existing residents living in East Chesterton and King's Hedges Wards would visit North East Cambridge for their shopping requirements – particularly if north/south connections are improved as is the vision in the Area Action Plan. Based on the retail context and geography analysis discussed above, it can be estimated that around one third of ward residents would visit North East Cambridge's centres – these residents would be located less than a 10-minute walk, and closer to North East Cambridge than the alternative centres of Arbury Court and Arbury Road/Milton Road.
60. Based on Cambridgeshire County Council's 2018-Based Population Forecasts, the total population of the two wards combined would be 19,490 by 2036. One third of this population equates to 6,497 by 2036. It can be assumed that an upper threshold of around 6,497 existing residents living in King's Hedges and East Chesterton wards are likely to visit North East Cambridge for their local shopping and leisure requirements once the development is complete.
61. The total residential, employment and student population supporting North East Cambridge retail and town centre floorspace will be approximately 54,159 people.

Retail Expenditure and Floorspace Capacity

62. The new population will generate retail expenditure to support new floorspace across North East Cambridge. The Experian E-Marketer system provides estimates of per capita expenditure for convenience and comparison goods expenditure; 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 are derived from Experian Retail Planner Briefing Note 17 and are discussed in more detail in the [Retail and Leisure Study - Baseline Report 2021](#).
63. For comparison goods, the analysis identifies an annual spend of £4,000 per capita for comparison goods and £2,070 per capita for convenience goods. Table 7 below sets out total available expenditure for convenience and comparison goods to the period 2036. This level of expenditure is – as set out above – driven by existing and new population both within and adjoining North East Cambridge.

Table 7: Total Available Expenditure, North East Cambridge 2036

Population	Convenience Goods £m	Comparison Goods £m
56,266	£112.1m	£216.6m

64. When considering retail floorspace and the scale required to serve the North East Cambridge, it must be set in the context of the Draft Area Action Plan vision discussed earlier in this report. For clarity, new facilities should ensure sustainable communities by offering essential local day-to-day shopping and service requirements within walking distance, ensuring residents don't have to regularly travel further afield via alternative modes of transport to gain access to such 'local' goods. The Area Action Plan vision of self-sufficiency does not equate to all shopping and service needs being met in North East Cambridge. It does however explain clearly that new retail and leisure floorspace should be of a local scale and not compete with Cambridge City Centre (page 176-178); and we highlight the following relevant extracts:

- A key aspect of sustainable communities is easy access to shops and other local services such as cafés and restaurants which help meet the day-to-day needs of the local communities. It is therefore important that both new and existing communities have easy access to these types of facilities to reduce the need for residents to travel and maintain vibrant and viable district, local and neighbourhood centres.
- It is important that any new proposed centres at North East Cambridge are sustainable, but do not undermine the viability of nearby existing retail centres.
- It is the intention of the area to provide a balanced range of shops and services that meet the needs of local residents, employees and visitors to the area.
- It is important that North East Cambridge meets local needs but is not a 'destination' location for people living further afield who may travel to the area by car, in order not to exceed the agreed 'trip budget' for Milton Road. It is therefore necessary to resist any proposal that will create a need for specific car parking provision.
- Local appropriately scaled commercial leisure uses such as pubs and restaurants will be an acceptable use in the North East Cambridge's centres. However, given the need to ensure North East Cambridge remains a sustainable destination but not a destination location, which attracts high volumes of car-based travel from beyond the local area, it is not intended for North East Cambridge to accommodate any large-scale cultural, entertainment or leisure facilities such as a cinema complex or a ten-pin bowling facility

65. District and local centres usually contain a convenience/food store and a selection of other services, cafes, and top up shopping facilities. Only a small proportion of comparison goods expenditure will be available to support new floorspace in North East Cambridge, with the remainder being spent in the higher order shopping centres. Taking into consideration the wide selection of higher order comparison goods categories and the intended role of district and local centres, we estimate that around 5% of total available comparison goods expenditure would be available to support new floorspace in North East Cambridge. Incorporating an industry informed sales density of £5,000 per sq m, we forecast need for the following levels of comparison goods floorspace (rounded):
- 2,200 sq m net / 2,700 sq m gross (80% net: gross for efficient new build, rounded)
66. Local top up shopping is generally estimated to form a larger proportion of locally available expenditure than for comparison goods. It is assumed that around 30% of expenditure is available to support local convenience goods shopping. In this case, based on the large employment and student population, it can be assumed that the overall average percentage would be lower, with the majority of North East Cambridge workforce/students undertaking some or most of their top up shopping nearer to their home address. Assuming a claim of 20% of expenditure, and incorporating an average sales density of £10,000 per sq m net, we forecast need for the following levels of convenience goods floorspace (rounded):
- 2,200 sq m net / 3,200 sq m gross (70% net: gross, additional food store storage required, rounded)

Unit Size and Mix

67. The Greater Cambridge Team have expressed the intention to incorporate flexible shop floor plates with the ability to adjust according to operator requirements, in order for retail provision to be flexible to accommodate future business and operational needs. Policy figures should be stated in gross square metres. Commercially, units located within a local or district centre would require smaller-format units of between 80-150 sq m gross. The incorporation of flexibility should be supported in the context of a fluctuating and fast-moving retail and leisure sector in terms of demand and operator requirements.

68. Convenience food stores in the designated centres should be large enough to act as an anchor food store, to provide a range of goods and services for local people, to attract footfall to the centre and support smaller, independent retail units in the same centre. These will therefore also need to be of a size that allows these other independent retail units to operate, without stifling competition as well as not requiring a separate car park or acting as a 'destination' for shoppers living beyond North East Cambridge, to ensure vehicle movements do not exceed North East Cambridge trip budget.
69. Small to medium sized convenience food stores typically occupy floor plates of between 1,200 and 2,000 sq m gross, examples include a larger Co-Op, a medium to full-format Aldi or Lidl, a small-medium sized Sainsbury's or Tesco. Smaller format food stores occupy floor plates of between 150 and 400 sq m gross, examples include Co-Op stores, Sainsbury's Local or Tesco Express.

Comparison Goods

70. Based on the identification of supportable retail floorspace (above), this scale of unit (80-150 sq m gross) would support a maximum of 34 comparison goods operators within North East Cambridge, and a minimum of 18 units, or an average of 26 units assuming a mix of unit size between 80-150 sq m gross.

Convenience Goods

71. We recommend that a small to medium sized convenience store is provided as part of the sustainable new community. These occupy floor plates of between 1,200 sq m and 2,000 sq m gross. Based on earlier analysis in respect of the socio-economic profile and nature of North East Cambridge's residential development, operators might include a Co-Op, Aldi, Lidl, Sainsbury's or Tesco, for example. This convenience store should be directed to the proposed district centre, designed and located to provide an anchor operator and to encourage footfall.
72. A food store of 2,000 sq m gross would likely drive operator need for a certain level of car parking, contrary to the car free vision of North East Cambridge. Operator consultation will be required to confirm this. It is more likely that a car free food store would be in the region of 1,200 sq m gross, and we recommend allowance is made for an anchor food store of this smaller size in the North East Cambridge Area Action Plan. A larger food store could be accommodated provided the operator can commit to 'car free' or 'limited' car parking.

73. In addition to the small/medium sized anchor convenience store, we recommend small convenience stores are located within each of the four local centres: Cowley, Greenway, Science Park and Station Approach. Based on the need for convenience goods floorspace set out above, we recommend allowance is made in North East Cambridge for four small convenience stores (c.200 sq m gross each) in the four local centres.
74. The five 'anchor' food stores combined equates to c.2,000 sq m gross of convenience goods floorspace, leaving residual c.1,200 sq m gross for smaller independent operators such as bakers and butchers. Based on a unit size of 80 sq m gross this equates to an additional 15 units across North East Cambridge. It is more likely for smaller convenience stores – baker, butchers, delicatessens, newsagents, tobacconists etc – to occupy the smaller units within a full unit range. The size of the food stores will need to be large enough to act as an anchor store for the centre but small enough to encourage and support independent retailers to create mixed and balanced centres.
75. Further discussions with food store operators should be undertaken to gauge floor plate, location and car parking requirements to ensure deliverability and inform scheme design. The health check audits of the largest district centres in Greater Cambridge (Mill Road West and East and Mitcham's Corner) identified 13, 8 and 9 convenience goods operators respectively.
76. The level of convenience goods floorspace need identified does not drive the need for a major food superstore with North East Cambridge. The analysis of current provision and shopping patterns earlier in this report identifies a range of existing facilities in close proximity to North East Cambridge for the new resident population. Car ownership would be required to access these stores, and their usage is inevitable, but a store of the size recommended (c.1,200 sq m gross / 840 sq m net) supplemented with independent operators would provide the best balance, providing for some food shopping needs thereby reducing the need to travel by car.
77. It should be noted that Aldi and Lidl food store formats are popular at the current time, highlighted by the strong performance and catchment area of the Aldi at Histon. The provision of one of these operators in the North East Cambridge district centre would likely generate a substantial inflow of car borne shoppers – depending on car parking provision. Operators including Co-Op, Sainsbury's and Tesco more frequently occupy local and district town centres without the provision of store-dedicated car parking. As noted earlier, operator consultation is advised.

Other Town Centre Uses

78. The district and four local centres would require a range of ‘other’ town centre uses in addition to comparison and convenience goods floorspace. According to Experian Goad, convenience and comparison goods floorspace – on average – occupy 47% of town centre floorspace, whilst 53% is occupied by alternative ‘other’ town centre uses including retail services, commercial leisure services and financial and business services.
79. Based on a requirement for 4,400 sq m net (5,900 sq m gross) comparison and convenience goods floorspace, this equates to an additional need for c.5,000 sq m net (6,700 sq m gross) of ‘other’ town centre floorspace. We estimate this level of ‘other’ town centre floorspace to require around 61 units based on a larger format store (110 sq m gross). Leisure and retail service operators such as bars/wine bars, cafes, restaurants and hairdressers often require these larger premises for preparation circulation space.
80. Commercial leisure uses should be local in scale to comply with the vision for North East Cambridge. Units would be sufficient in scale to accommodate cafes, restaurants and wine bars, for example, helping people meet their day-to-day needs and reducing the need to travel to access such facilities elsewhere. They should be limited in number to avoid the creation of a ‘destination’ within North East Cambridge which would attract car-borne visitors. North East Cambridge is not an appropriate location for larger commercial leisure facilities such as cinemas, ten-pin bowling and music/performance venues. This is because these uses normally have large catchment areas and are therefore often located in city centre or edge-of-city centre locations.

Use Classes & Class Use E

81. The current Use Class Use E includes a wide range of uses including shops, restaurants, financial and professional services, indoor sports, medical and health services, creche/day-nursery or daycentre, and business use compatible with a residential environment. These uses are deemed to have what is referred to as ‘permitted development rights’. This allows uses within Class Use E to change between one another without requiring planning consent. This means, in centres especially it is difficult to ensure there is a balance of different shops and services available to ensure local people can meet their day-to-day needs.

Conclusions & Recommendations

82. The analysis above identifies a need for approximately 107 units across one district centre and four local centres, including five anchor convenience stores. It is also helpful to 'sense check' this figure and compare it to the town centre health check audits undertaken as part of the [Retail and Leisure Study - Baseline Report 2021](#) evidence document. This demonstrates that district centre unit numbers across the Greater Cambridge area falls between 18 and 83, listed in Table 8 below, suggesting a relatively large North East Cambridge District Centre, and network of smaller North East Cambridge Local Centres.

Table 8: Number of Retail Units in Cambridge District Centres

District	No. of retail units
Mill Road West	83
Mill Road East	77
Mitcham's Corner	53
Cherry Hinton High Street	33
Arbury Court	19
Histon Road	18

83. Table 9 below summarises the scale of town centre floorspace and unit mix to be provided across North East Cambridge.

Table 9: North East Cambridge Proposed Floorspace and Unit Mix

Floorspace Type	Number of Units [circa]	Floorspace (Sq m net)	Floorspace (Sq m gross)
Comparison Goods	c.26	2,200	2,700
Convenience Goods	c.20	2,200	3,200
Other Town Centre	c.61	5,000	6,700
Total	c.107	9,400	12,600

Note: Convenience Goods includes one anchor food store (c.1,200 sq m gross) and four small local centre convenience stores (c.200 sq m gross)

84. Tables 10 below summarises, for each proposed new North East Cambridge centre, the number of units and the scale of town centre floorspace for convenience, comparison and other centres uses each centre, across North East Cambridge should provide.

Table 10: North East Cambridge Proposed Unit and Floorspace (sqm gross) Split by Centre

Type of Centre	Designated Centre	Units (circa)	Convenience	Comparison	Other Town	Total
District	District Centre	c.67	2,004	1,691	4,195	7,890
Local	Station Approach	c.10	299	252	626	1,178
Local	Science Park	c.10	299	252	626	1,178
Local	Greenway	c.10	299	252	626	1,178
Local	Cowley Road	c.10	299	252	626	1,178
Total	All	c.107	3,200	2,700	6,700	12,600

Note: Convenience Goods includes one anchor food store (c.1,200 sq m gross) and four small local centre convenience stores (c.200 sq m gross); Other Town Centre Uses (53% of total Units)

85. Total floorspace figures within this assessment have been rounded to provide clearer and, in some cases a more practical quantum for application. Policy should state all floorspace figures in sq m gross to ensure a maximum floorspace threshold and ability for internal flexibility/layout/adjustable walls, for example. We have proposed approximate anchor food store sizes, but there may be some flexibility within this convenience goods category, which will be informed by discussions with operators ensuring commercial delivery. Any changes within the overall floorspace threshold (i.e. larger store, more than one anchor store) must be considered alongside the car free vision for North East Cambridge and related issues around car parking levels.
86. Aside from the five anchor convenience stores, policy should encourage smaller unit sizes appropriate to district and local centres, between 80 and 150 sq m gross. This will ensure an appropriate selection of operator and goods type, and smaller and independent businesses serving communities for their local shopping and service requirements. Larger units would need to be justified and limited in number.

87. Policy should restrict the land uses within the defined district and local centre boundaries through the use of tightly worded policies, allocations and eventually conditions attached to planning permissions. This will assist the Council in managing the health of the district and local centres moving forwards, ensuring a truly sustainable community with access to an appropriate mix of retail and leisure services, avoiding the over-proliferation of particular uses.
88. Policy allocations specific to the district and local centres within North East Cambridge should allow the following Use Class E and Sui Generis uses, and should be defined in detail to ensure clarity as follows:
- Display or retail sale of goods, other than hot food, confined to 'comparison goods non-food retail' and 'convenience goods retail' in the form of food stores, bakers, butchers, fishmongers, delicatessens, newsagents, health food shops and off licences;
 - Sale of food and drink consumption (mostly) on premises, confined to include cafés, bars and restaurants;
 - public houses, wine bars, or drinking establishments / drinking establishments with expanded food provision (sui generis);
 - Financial and professional services;
 - Other appropriate services in a commercial, business or service locality, to include:
 - i. Dry cleaners
 - ii. Hairdressers
 - iii. Beauty salons
 - iv. Opticians
 - v. Photo processing
 - vi. Post offices
 - vii. Travel agents
 - viii. Clothing and fancy dress hire
 - ix. Repairs, alterations and restoration
 - x. Electronics and home entertainment
 - xi. Mobile phones and accessories
 - Provision of medical or health services – to cover dentist surgery's and other private, medical services.

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89. Policy allocations specific to the district and local centres within North East Cambridge should allow for the following floorspace split as set out in Table 9 above, and specify the percentage split for each use type as follows:
- Comparison and convenience goods – 47%
 - ‘Other town centre uses’ (as listed above in paragraph 81) – 53%
90. Policy allocations and conditions attached to planning permissions should prevent the proliferation of fast food take-aways (sui generis). The national average is currently 6%, and policy may wish to ensure the representation of fast-food take-aways (Sui Generis) does not exceed 3-5%, and each application should be considered on a case-by-case basis to take into account operating hours, proximity to education, and noise/public health and ventilation, for example. An allowance could be incorporated into the 53% floorspace split identified above.
91. Policy allocations and conditions attached to planning permissions should encourage active frontages, and uses which serve the public and enhance the function, vitality and viability of each centre as a shopping and leisure destination. High street retail areas should avoid and prevent ‘closed/dead’ frontages which are inactive and discourage vitality, vibrancy and pedestrian footfall. Policy should encourage transparent glazing, and high quality and consistent shop frontage design and signage.
92. Policy should ensure centres are anchored by appropriate retail, leisure and community uses and supported by other uses such as residential to maintain high levels of footfall, encourage linked trips by walking and cycling as well as make a positive contribution to creating vibrant places.
93. Policy should encourage meanwhile uses in vacant shop units, i.e. the use of temporary contracts that allow community groups, small businesses or individuals to move into these vacant spaces and set up shop, on the understanding that they will leave within an agreed period of time.
94. In it important any new centres are able to meet the needs of local people and maintain their vitality and vibrancy of new centres with a healthy balance of shops and services. This includes a minimum proportion of convenience shopping which is considered essential for any sustainable community. In practical terms, this means planning consent for new centres at NEC will need to consider the removal of certain sub-categories of permitted development rights to ensure the role and function of these centres can be protected and maintained. The removal of permitted development rights will ensure that any

planning applications for changes of use within defined Article 4 areas are assessed against the Council's development plan.

95. The withdrawal of the permitted development rights should not be interpreted as a default refusal for planning consent to be granted but rather as a means of protecting and maintaining the role and function of these centres. It will mean that the proposal will need to demonstrate how it will support the role and function of the centre and not adversely affect the centre's character, vitality and vibrancy. The removal of permitted development rights may extend to include E(d) Indoor sport, recreation or fitness, E(e) Provision of medical or health services, E(f) Creche, day nursery or day centre and E(g) Business uses not adversely affecting residential amenity.
96. Councils also have the power to remove national permitted development rights under what is known as an 'Article 4 Direction'. The Councils should consider the introduction of Article 4 Directions to remove permitted development from Use Class E within the town centres to residential uses. This is an effective mechanism to protect the retail function of the five centres within North East Cambridge.