Greater Cambridge Retail and Leisure Study

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Contents

Introduction

1.1 Urban Shape was instructed in September 2019 by Cambridge City Council and South Cambridgeshire District Council ('the Council') to undertake a Retail and Commercial Leisure Study (RCLS). The previous evidence is out-of-date in light of recent planning reform, continued economic fluctuations, and the fast-paced evolution of the high street, and it is timely to revisit and refresh the Council's retail and town centre strategy.

1.2 This up-to-date assessment forms a key part of the evidence base in support of the Joint Cambridge and South Cambridgeshire Local Plan. The RCLS will also remain at the Council's disposal to assist in the determination of planning applications for new development.

1.3 Over the last ten years the retail and leisure sector have continued to undergo a period of unprecedented change. Since the publication of the previous Cambridge Sub-Regional Retail Study 2008, and 2013 Update, town centres have had to evolve to become more than simply a place to shop, presenting themselves as multi-purpose 'destinations'. For many this is work in progress, and the need for a robust town centre strategy is more crucial now than ever.

1.4 This study provides 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, sets out current and future needs for additional floorspace to the period 2040, and details robust strategic and detailed planning policy recommendations. Hatch prepared the town centre health checks.

1.5 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.

1.6 In addition to on-site and desk-based research, this report is informed by a Household Telephone Survey covering 1,100 households across 11 survey zones;

interviewing was undertaken in November 2019. 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.

1.7 An in-centre shopper survey, engaging 500 visitors to Cambridge historic core and the Grafton 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 outputs have informed different parts of the study and are referenced throughout.

Study Timeline

1.8 This Retail and Leisure study commenced in September 2019, ensuring the successful collection of survey and on-site audit data prior to the Covid-19 pandemic and consequent UK 'lockdown' which commenced on 23rd March 2020.

1.9 The progress of the study through to completion was paused by the Council to allow a considered and informed approach to forecasting over the plan period as the nation emerged from the Covid-19 pandemic; and also to follow the Local Plan preparation programme.

1.10 The programme adjustment has enabled the consideration of new and up-to-date published commentary in respect of economic scenarios, wider world events, cultural shifts, commercial pressures and opportunities, and the implications for our high streets. New and up-to-date economic forecasting has been incorporated.

1.11 The extended timeframe also enabled consultation with key stakeholders and shopping centre owners as they emerged from various periods of 'lockdown' closures and entered new phases of budgetary constraints. The programme has followed the progress of the many major strategic sites across Greater Cambridge, as set out in this report.

Report Structure

1.12 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.

Policy Context and Legislative Change

1.13 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 (2024)

1.14 The most up-to-date National Planning Policy Framework (NPPF) was published in December 2024. 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.

1.15 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.

1.16 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.

1.17 In respect of Development Management, paragraph 91 of the NPPF 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 (or expected to become available within a reasonable period) should out of centre sites be considered. Paragraph 92 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.

1.18 Paragraph 94 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 square metres 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).

1.19 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 94, it should be refused.

Planning Practice Guidance (PPG)

1.20 In March 2014 the Department for Communities and Local Government (DCLG) launched online Planning Practice Guidance (PPG). It was last updated in July 2021. 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.

1.21 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

1.22 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. Alongside strong population and visitor growth, 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).

1.23 Paragraph 2.15 quotes a previous version of 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 square metres net of comparison retail floorspace to the period 2022, and no capacity for additional convenience goods floorspace.

1.24 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.

1.25 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 square metres 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.

1.26 The hierarchy of town centres in Cambridge is set out in Policy 6, as identified below.

City Centre (total number: 1)

Designated centres: City Centre boundary and primary shopping area (PSA). This is linked to policies 10 and 11.

District Centres (total number: 6)

Designated centres: Arbury Court, Cherry Hinton High Street, Histon Road, Mill Road East, Mill Road West, Mitcham's Corner. This is linked to policy 72.

Local Centres (total number: 8)
Designated centres: 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. This is linked to policy 72.

Neighbourhood Centres (total number: 14)
Designated Centres: Adkins Corner, Akeman Street, Campkin Road, Carlton Way, Chesterton High Street, Ditton Lane, Fairfax Road, Grantchester Street (Newnham), Green End Road, Hawthorn Way, King's Hedges Road, Norfolk Street, Wulfstan Way, Victoria Road. New Centre coming forward: Clay Farm. This is linked to policy 72.

1.27 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.

1.28 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.

1.29 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.

1.30 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.

1.31 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.

1.32 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.

1.33 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 square metres 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.

1.34 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).

1.35 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 is dependent on the relocation of current activities at the airport, which is scheduled to begin after 2027. 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.

1.36 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.

Areas of Major Change and Opportunity Areas

Policy 12

- Area of Major Change: Fitzroy/Burleigh Street/Grafton [no site-specific proposal sites]
- Principle land use: Retail and Leisure (Use Class A1/2/3/4 and D2), with residential and student accommodation on upper floors. Up to 12,000 square metres of additional comparison goods floorspace could be accommodated.

Policy 15

Area of Major Change: Cambridge Northern Fringe East & New Railway Station [no site-specific proposal sites]

Principle land use: Primarily employment uses with supporting retail, leisure and residential. [Now subject of Draft Area Action Plan 2021, discussed later in this section]. Joint strategic site with South Cambridgeshire District Council.

Policy 16

Area of Major Change: South of Coldham's Lane [no site-specific proposal sites]
Principle land use: Urban Country Park

Policy 17

Area of Major Change: Cambridge Bio-Medical Campus (including Addenbrooke's Hospital) [including site allocation M15]
Principle land use: 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.

Policy 18

Area of Major Change: Southern Fringe (Clay Farm, Trumpington Meadows, Bell School and Glebe Farm) [including site allocation R42a, R42b, R42c, R42d]
Principle land use: 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

Policy 19

Area of Major Change: West Cambridge [site allocation M13]
Principle land use: 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.

Policy 20

Area of Major Change: Land between Huntingdon Road and Histon Road (NIAB 1) [site allocation R43]
Principle land use: New neighbourhood, mix of residential with complementary primary school, new local centre, food store (up to 2,000 square metres), community facilities, open space, allotments and facilities for children and teenagers.

Policy 21

Area of Major Change: Station Areas West and Clifton Road [site allocations M2, M14 and M44]
Principle land use: Vibrant mixed-use areas. Residential, B1 employments, Use Class A retail, community uses, hotel and open spaces

Policy 22

Opportunity Areas: Mitcham's Corner
Principle land use: Sustainable transport modes/pedestrian cycling rather than vehicle, place-making, delivery of local shops and services, reinforcing the high street feel.

Policy 23

Opportunity Areas: Eastern Gate
Principle land use: 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.

Policy 24

Opportunity Areas: Mill Road
Principle land use: 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.

Policy 25

Opportunity Areas: Cambridge Railway Station, Hills Road Corridor to the Cen
Principle land use: 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.

Policy 26

Opportunity Areas: Old Press/Mill Lane
Principle land use: 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.

1.37 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.

1.38 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 unit.

South Cambridgeshire Local Plan (2018)

1.39 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. It is important to note there are no NPPF 'town centre' designations in South Cambridgeshire, at present. However, the larger settlements will likely be allocated as 'town centres' within the new Local Plan, addressed throughout this report.

1.40 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).

1.41 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 paragraph 8.73 concluded that – in South Cambridgeshire – "additional needs were generally related to serving the planned major developments such as Northstowe".

1.42 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).

1.43 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.

1.44 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.

1.45 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.

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

Strategic Sites on the Edge of Cambridge

2.4: New Settlement Strategic Sites, South Cambridgeshire

Policy SS/1
Site: Orchard Park/Cambridge Northern Fringe (West)

Principle land uses: 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 square metres B1 Business development, a primary school, a local centre, public open space.

Policy SS/2
Site: Land between Huntingdon Road and Histon Road (Northwest Cambridge) (Darwin Green 2 / NIAB 2)

Principle land uses: 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 food store.

Policy SS/3

Site: Cambridge East

Principle Land Uses: 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, a series of local centres, and primary and secondary school

Policy SS/4
Site: Cambridge Northern Fringe East

Principle Land Uses: Joint strategic site with Cambridge City authority.
Primarily employment uses with supporting retail, leisure and residential.

Policy NW/4
Site: North West Cambridge

Principle Land Uses: Joint Strategic site with Cambridge City authority. Subject of Cambridge Northwest Area Action Plan (2009) (see below).

Policy SS/5
Site: Northstowe Extension

Principle Land Uses: Subject of Northstowe Area Action Plan (2007) (see below).
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

Policy SS/6
Site: Waterbeach New Town

Principle Land Uses: 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. One town centre and 3 local centres. A long term development opportunity, taking place over the plan period and beyond. Supplementary Planning Document (SPD) adopted 2019.

Policy SS/7
Site: New Village at Bourn Airfield

Principle Land uses: c.3,500 new homes and all necessary community facilities and services, reference to two primary schools and one secondary school.
A long term development opportunity, taking place over the plan period and beyond. One village centre. Supplementary Planning Document (SPD) 2019.

Table 2.5: Sustainable Village Strategic Sites, South Cambridgeshire

Policy SS/8

Site: Cambourne WestPrinciple land uses: 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. Food store up to 500 square metres (gross) within a 600 metre walk of the great majority of homes.

1.47 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).

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

Cambridge East Area Action Plan (2008)

1.49 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.

1.50 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.

1.51 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.

1.52 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 Northwest Area Action Plan (2009)

1.53 The Cambridge Northwest 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.

1.54 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.

1.55 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 square metres net supermarket.

DRAFT Northeast Cambridge (NEC) Area Action Plan (2021)

1.56 The Council are developing plans for a new city district in Northeast Cambridge (NEC), and the Area Action Plan will be the planning policy framework that guides this process. In Autumn 2021, the Proposed Submission Plan (Regulation 19) was considered by councillors at both Councils and was approved (November 2021). This included proposed revisions to the Plan, following a consultation on the Draft Plan in 2020 and further evidence and stakeholder engagement undertaken between Autumn 2020 and Summer 2021.

1.57 The vision for NEC 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 Northeast 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.

1.58 Five new centres (1 District and 4 Local) are planned within Northeast 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, distributed throughout the planned area where they will help to serve and integrate new and existing communities – including those around Cambridge North Station, St John's Innovation Park and on the edge of the Cambridge Science Park near Cambridge Regional College. The larger district centre – with shops and restaurants, community and cultural facilities – will be located centrally to the main area of new development.

1.59 NEC 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)

1.60 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.

1.61 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)

1.62 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.

1.63 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).

1.64 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.

1.65 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

1.66 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. SPDs 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.

1.67 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.

1.68 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.

1.69 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.

1.70 The 2013 Retail and Leisure Study Update identified a need for 14,141 square metres 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 square metres could be provided in the area.

1.71 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

1.72 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.

1.73 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.

1.74 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.

1.75 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."

1.76 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.

1.77 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 B1a, 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.

1.78 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 280m2. 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

1.79 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.

1.80 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’.

1.81 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 LPAs 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, this includes 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 Bourn 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 square metres, and were previously used for at least 2 years for commercial, business or service use.

National Context

1.82 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.

1.83 Trends in recent years have been well documented, driven predominantly by Brexit, the Covid-19 pandemic and now the war in Ukraine. 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.

Economic Context – Recent Trends and Outlook

1.84 In January 2024, Experian report that the UK economy – like much of the rest of the world – continues to face significant headwinds in the form of surging inflation, high energy costs and supply chain disruption. Even as the impact of the Covid-19 pandemic eases, the economic consequences of the war in Ukraine continue to reverberate in the form of high energy prices. UK GDP remains 0.8% lower than pre-pandemic levels putting it in a unique position as the sole G7 nation that has not fully regained the output lost during the Covid-19 pandemic.

1.85 The UK fell into a mild recession in the second half of 2023 after two consecutive quarters of contraction. The return to growth lacked momentum hampered by stubborn inflation, tight fiscal policy and heightened uncertainty. Experian report that consumer sentiment is already at a low ebb and the squeeze in household incomes is set to continue. Meanwhile, it is expected that labour market conditions will deteriorate as cost pressures and uncertainty dent hiring intentions, with a rise in unemployment expected. Interest rate and tax rises, and spending cuts point towards a weak economic outlook. Inflation has eased considerably during 2024.

1.86 Central bank policy has loosened slightly in 2024, with cuts in interest rates, but risks remain. The global economic backdrop is uncertain and subject to dynamic changes, with the current focus on the developments of the war in Ukraine, and economic impacts stemming from it. Experian emphasise that the longer it takes to normalise the situation and ease geopolitical tensions, the larger the down-side risk to the economy becomes, namely prolonged supply-chain disruptions, constrained trade, volatility and elevated material and energy prices, resulting in wide-spread inflationary pressures.

1.87 In respect of consumer spending, squeezed household budgets due to double-digit inflation and rising interest rates is underpinning a continued weakness in consumer and business confidence. Real personal disposable income is expected to decline by at least 2% this year and next, particularly for those households with mortgages that are coming off fixed-rate loans. The latest ONS report on retail sales showed that shop sales volumes experienced a decline of 1% in December, following a 0.5% drop in the previous month suggesting that consumers continue to curb their spending.

1.88 Fine-grained trends reflect consumer behaviour responding to wider economic concerns and restricting non-essential expenditure. The 'significant' 0.8% decline in non-food sales (December 2022) was primarily due to a 6.2% decrease in common gift categories such as toys, cosmetics, jewellery, and sports equipment, which offset the modest growth in clothing and furniture sales.

1.89 Looking ahead, Experian forecast that spending growth over the course of 2025 is clouded by consumers' wider economic constraints, namely a cost-of-living squeeze. There is a continued challenge in balance pay growth, inflation and real personal disposable incomes – which has curbed consumer spending throughout 2024. Convenience, comparison and leisure expenditure is expected to experience small growth in the near future. According to figures from Experian's Goad database, the UK retail store vacancy rate has been rising since 2012 (14.4%), reaching 19.2% in July 2022, up from 18.6% in July 2021.

1.90 The recovery over the coming years will be shaped by the continued after-shocks from the pandemic, the extent of potential scarring to the UK's longer term economic potential and the supply-chain disruption due to shutdowns and continued Brexit impacts. 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; and the unprecedented nature of these issues means all forecasts will be subject to greater than usual uncertainty.

1.91 Key variable factors include the success of government measures to prevent widescale business insolvencies and containing the pace of job shedding; the longevity of the war in Ukraine; and the adjustment to the new trading environment post-Brexit and impacts of trade agreements.

The Evolving Role of the Town Centre

1.92 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 – particularly in the larger cities. 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.
- The mix of food and beverage in the form of cafes, restaurants, and bars, for example. These remain important contributors to diversity, with spending in restaurants and cafes rebounding strongly post-Covid, but now subject to the household spending squeeze. Nevertheless, they remain important businesses in the overall town centre mix.
- 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.

1.93 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."

1.94 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.

1.95 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.

1.96 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.

1.97 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’.

Online and Multi-Channel Retailing

1.98 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.

1.99 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.

1.100 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.

1.101 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.

1.102 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

1.103 Research indicates that the click and collect market will grow by a further 46% by the end of 2025. 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.

1.104 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".

1.105 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

1.106 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.

1.107 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.

1.108 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:

> M&Co (2022), Joules (2022), AMT Coffee (2022), Made.com (2022), Sofa Workshop (2022), TM Lewin (2022), 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)

1.109 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.

1.110 It is predicted that the wider economic uncertainty driven by the Covid-19 pandemic and wider world events, will drive a substantial amount of retail property into the hands of insolvency practitioners over the next few months.

Commercial Leisure Sector

1.111 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.

1.112 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. A short-lived post-Covid return to boom trading is not expected to last, with the leisure sector also being impacted by the economic downturn and squeezed household expenditure.

The Convenience Sector

1.113 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

1.114 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.

1.115 According to research from CACI1, 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,

[1] Analytical research company, providing operator trend data.

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

1.116 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 – 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.

1.117 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.

1.118 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.

1.119 The combined effects of Covid-19 and new, more flexible planning legislation brought retail parks back into favour. It was reported (Workman[2], 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.

1.120 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'.

1.121 Workman state:

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[2] Workman is the largest, independent commercial property management and building consultancy firm in the UK.

"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."

1.122 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.

1.123 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 by their owners over the Local Plan period in the context of market trends and new planning legislation. The role of retail at these retail parks should be monitored moving forwards, as out-of-centre retail parks will also be impacted by the uncertain economic climate.

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, new planning legislation, and wider economic trends have and will continue to accelerate these trends. Away from the high street, the composition and role of out-of-centre retail parks will almost certainly evolve towards more mixed uses spaces and places as a consequence of the same trends.
- An increasingly diverse town centre with a wider range of uses 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 environmental and public realm projects alongside longer-term major development/redevelopment can have far-reaching positive benefits to the performance of a town centre.

Sub-Regional Context

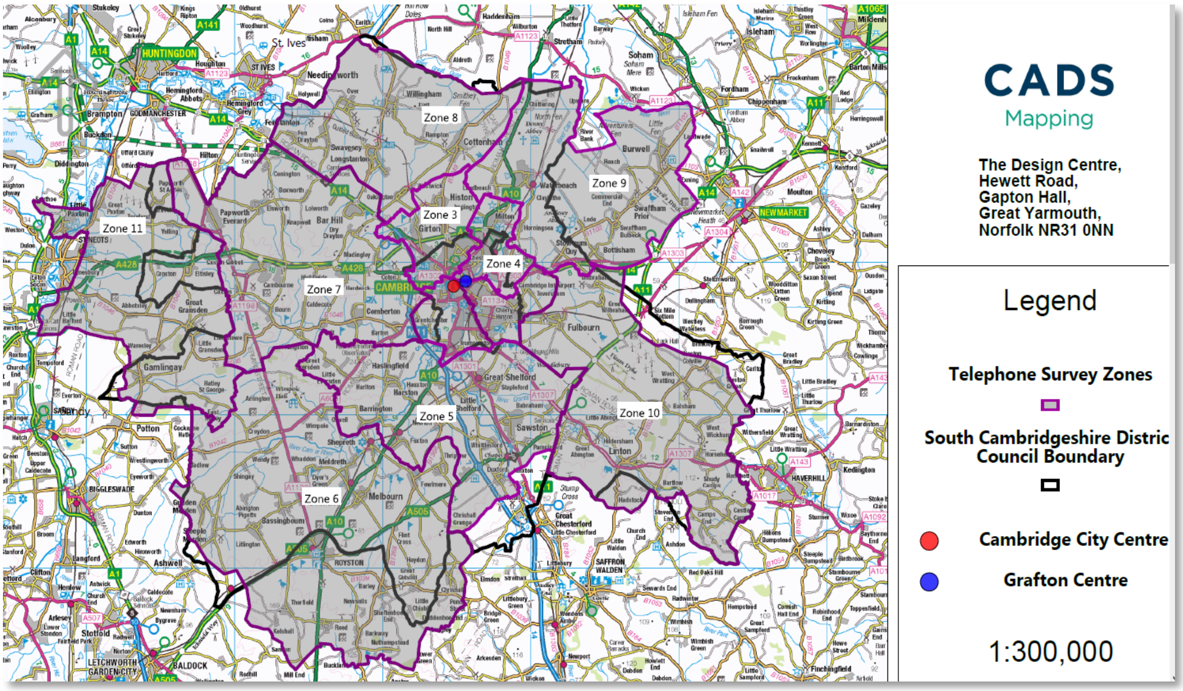
1.124 In this section, we set out the sub-regional context within which the town centres in Greater Cambridge operate. Administrative areas are not 'closed systems' and it is natural to expect a degree of expenditure inflow from beyond the Greater Cambridge study area, and also expenditure leakage to the surrounding network of town centres and other shopping destinations outside Greater Cambridge.

1.125 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

1.126 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.

Figure 4.1: Household Telephone Survey Area



1.127 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.

2013 Retail & Leisure Study Update - Overview

1.128 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.

1.129 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.

1.130 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.

1.131 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.

1.132 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.

1.133 The 2013 study identified baseline 'need' to support c.14,000 square metres net of comparison goods floorspace by 2022, growing to c.30,000 square metres 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

1.134 The retail and town centre offer in South Cambridgeshire was last surveyed and analysed in 2008 as part of the previous 'Cambridge Sub-Regional Retail Study'. Health checks of thirteen Rural Centres were undertaken, and a qualitative and quantitative analysis of the major food stores completed. It was concluded that the centres in South Cambridgeshire do not have 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.

2023 Sub-Regional Shopping Patterns

1.135 Consistent with the 2008 and 2013 studies, the up-to-date household telephone survey 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. Market shares are applied to expenditure forecasts to calculate and present the 2023 baseline turnover and performance for this Study; 2023 is the 'baseline year' in this study.

1.136 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, 2023

Location	**Drive Time from Cambridge City Centre**	**2023 Trade Draw (£m)**	**2023 Trade Draw (%)**
Cambridge City Centre (Historic Core)	-	£491.4m	50.1%
Grafton Shopping Centre, Cambridge City Centre	-	£34.7m	3.5%
Cambridge City Centre – combined	-	£526.1m	53.6%
Cambridge Retail Park, Newmarket Road	1.5 miles	£104.6m	10.7%
Beehive Centre, Coldhams Lane (including Asda)	1.5 miles	£27.1m	2.8%
Bar Hill (including Tesco Extra)	8.0 miles	£20.7m	2.1%
Tesco Extra, Old North Road, Royston	15.0 miles	£17.7m	1.8%
Royston Town Centre	14.0 miles	£17.0m	1.7%
Retail Warehousing, Newmarket Road	1.5 miles	£16.0m	1.6%
Tesco Superstore, Milton	4.0 miles	£13.3m	1.4%
St Neots Town Centre	19.0 miles	£13.3m	1.4%
Newmarket Town Centre	14.0 miles	£10.7m	1.1%

Location	Drive Time from Cambridge City Centre	2023 Trade Draw (£m)	2023 Trade Draw (%)
Huntingdon Town Centre	20.0 miles	£10.6m	1.1%
Biggleswade Retail Park, Biggleswade	20.0 miles	£8.1m	0.8%
Letchworth Town Centre	27.0 miles	£6.5m	0.7%
Saffron Walden Town Centre	15.0 miles	£6.2m	0.6%
Stevenage Town Centre	30.0 miles	£6.1m	0.6%
Ely City Centre	17.0 miles	£5.2m	0.5%
Bedford Town Centre	30.0 miles	£2.9m	0.3%
Haverhill Town Centre	18.0 miles	£2.7m	0.3%

Source: Household Telephone Survey / Experian Retail Planner February 2024

1.137 Cambridge city centre is located most central to the survey area, drawing £526.1m of comparison goods expenditure (53.6%) from Zones 1-11. Table 4.2 identifies the market share of Cambridge city centre (including the Grafton Centre) across each survey zone, demonstrating its strength as a key attractor destination in the sub-region.

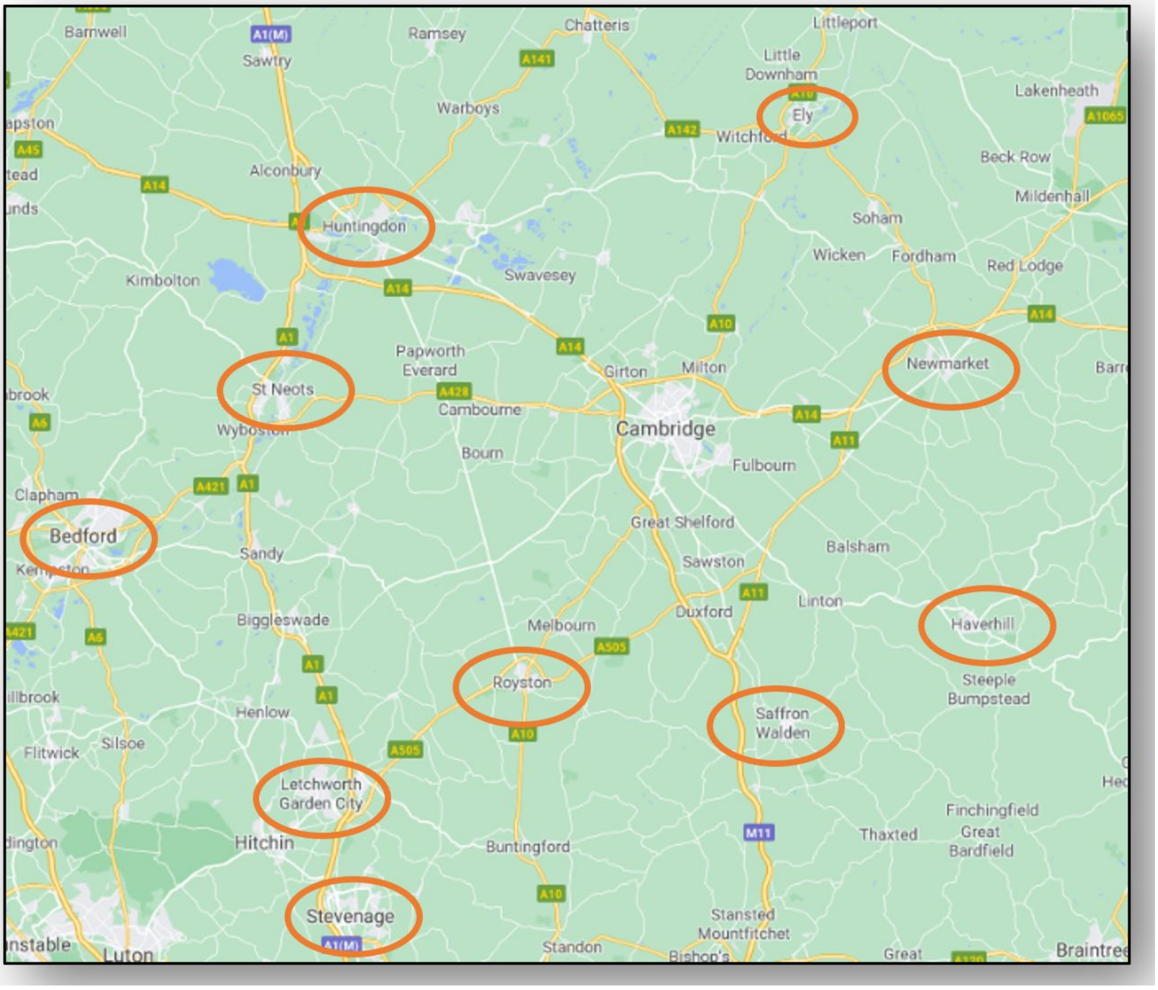
Table 4.2: Cambridge City Centre Market Share (Comparison Goods)
Source: Household Telephone Survey

Zone	Cambridge City Centre Market Share (comparison goods) (%)
1	64.1
2	69.2
3	63.6
4	49.3
5	47.9
6	45.6%
7	55.7%
8	46.3%

9	44.9%
10	46.6%
11	21.4%

1.138 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



1.139 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 4.2 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 4.2 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%)

1.140 In total, £114.0m 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 11.6% 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

1.141 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.

1.142 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 15.7% - a reduction of 8%. 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.

1.143 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.

1.144 Experian stated in February 2024 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 25.5% 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.

1.145 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 2023. This compares favourably to physical out-of-centre retail floorspace which experienced a larger decline in market share of 8% over the same time period.

1.146 Experian expect the SFT market share to continue to increase over the forecast period, reaching 29.1% by 2035 and around 29.7% of total retail sales by 2040. The implications of this increase have been factored into the quantitative need forecasting in later sections.

1.147 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 comparison goods 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

1.148 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%.

1.149 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 23.7% to 15.7%. 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 22.8% in 2023).
- 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.

Cambridge City Centre

1.150 This section provides a review of the current vitality and viability of Cambridge City Centre, developing a picture of its overall composition and performance. The assessment is based on key indicators of town centre vitality and viability set out in the PPG. The research and analysis in this section is led and reported by Hatch.

Overview

1.151 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 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, and was only out-performed by Westfield London and Knightsbridge.

1.152 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).

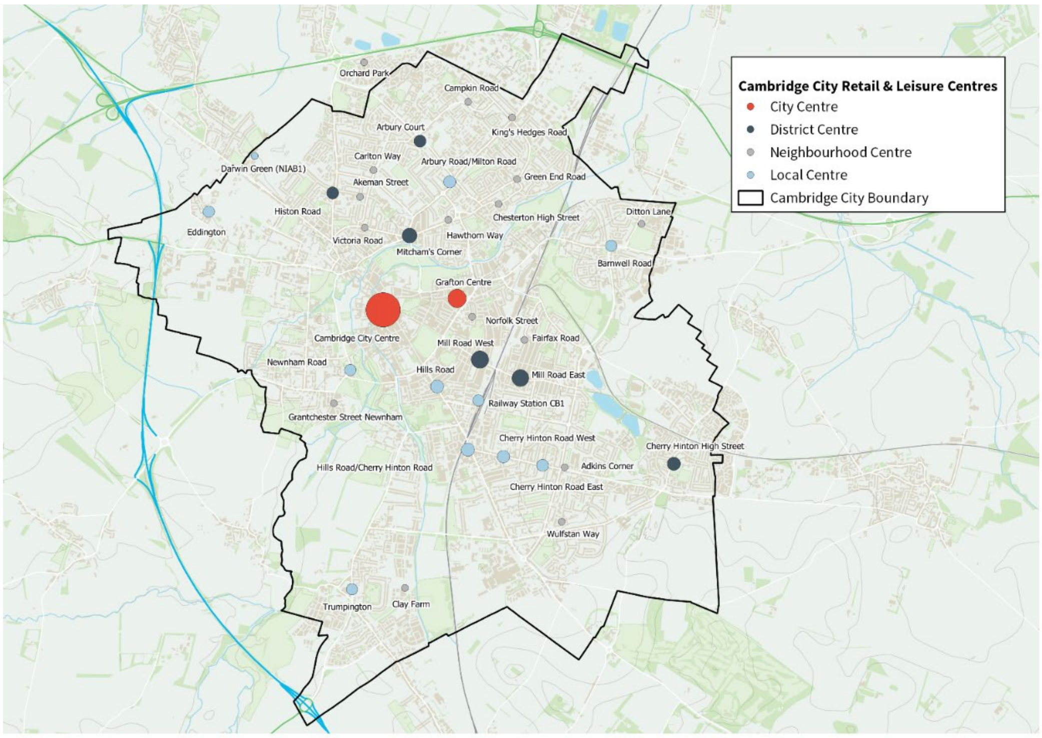
1.153 The Cambridge City Council area is also served by District, Local and Neighbourhood Centres, as categorised in both the 2008 and 2013 Retail Studies. The relative size of each town centre within Cambridge City is shown in the map below (Fig.5.1). Further analysis of the District and Local Centres is provided in the next chapter.

1.154 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

1.155 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.

Figure 5.1: Retail Hierarchy, Cambridge City Council



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

1.156 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

Convenience

- Shops selling food, drinks, tobacco, newspapers, magazines, cleaning materials etc.

Comparison

- Shops selling clothes, furniture/carpets/home furnishings, DIY, domestic appliances, specialist non-food (e.g. antiques, bookshops, music shops)

Service

- Banks, building, societies, restaurants, takeaways, pubs, local public facilities such as libraries etc.

Leisure

- Restaurants, cafes and bars, cinemas, theatres and museums, recreation and sport, hair and personal grooming, betting shops

Vacant

- Units which are currently vacant

Cambridge City Centre: Historic Core

1.157 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.

1.158 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.

1.159 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.

1.160 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.

1.161 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

1.162 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.

1.163 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 les than in 2013.

1.164 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.

1.165 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

Store Type	**Cambridge Historic Core No of Units**	**Cambridge Historic Core %**	**Cambridge Historic Core Variance from UK**	**Cambridge Historic Core 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%
Total	581	100%	-	+37	100%

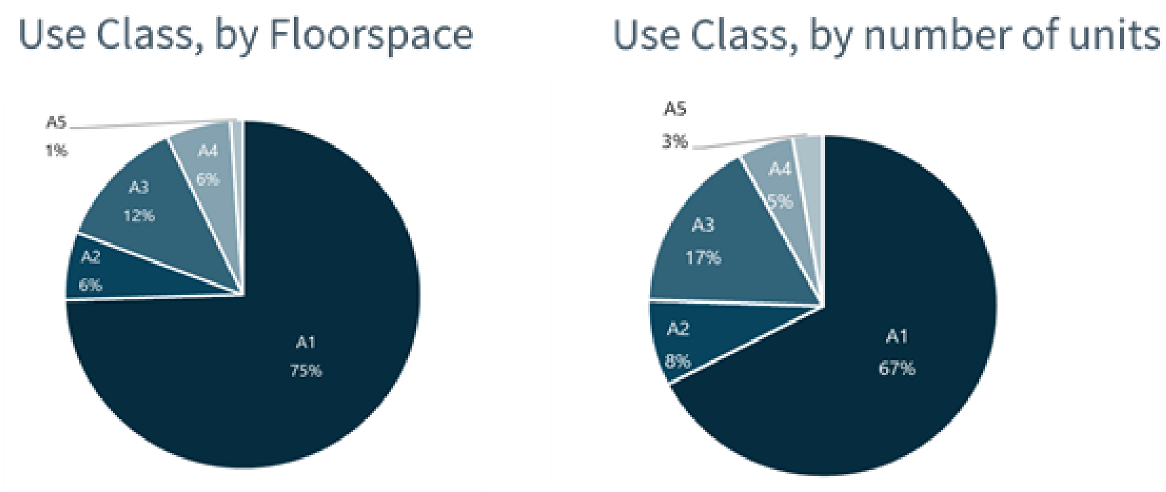
Source: GOAD, 2018, Hatch Town Centre Walkarounds (conducted November 2019)

Table 5.4: Cambridge Historic Core Composition by Floorspace

Store Type	Cambridge Historic Core No of Units	Cambridge Historic Core %	Cambridge Historic Core Variance from UK	Cambridge Historic Core 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%
Total	123,080	100%	-	-25,625	100%

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

Figure 5.2: Use Classes in Cambridge Historic Core, 2020

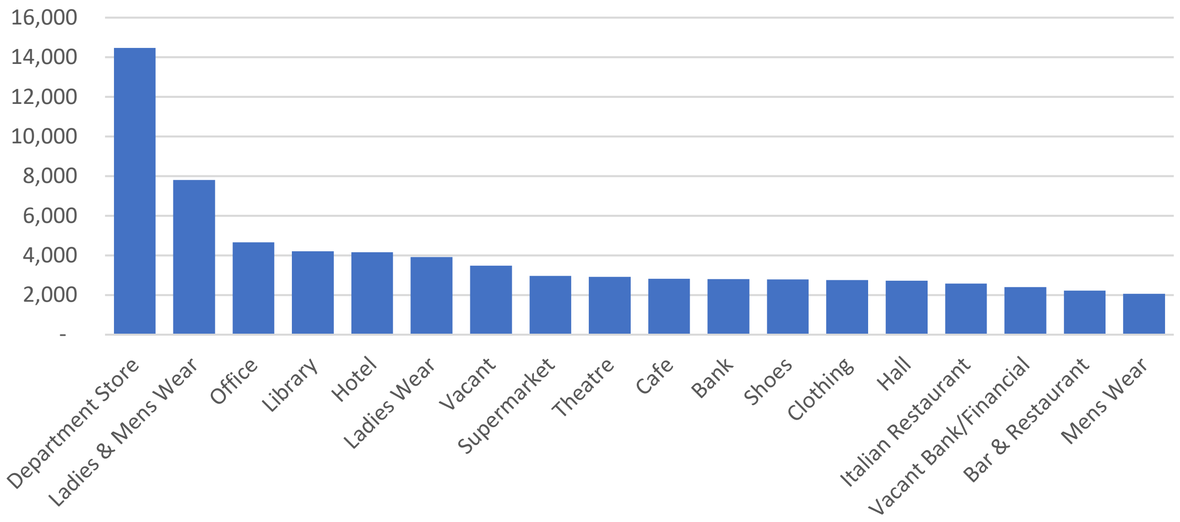


Source: GOAD, 2018

1.166 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.

1.167 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

1.168 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: Sidney Street / St Andrews Street

Key Characteristics: 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&M, Zara, Sports Direct and John Lewis. There is a wide mix of retailers, from high-end to budget located in this area.

Character Area: Trinity Street / Market

Key characteristics: 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). There is a growing service offering to reflect the high tourist footfall in this area. This includes both restaurants (e.g. Franco Manca and Gardenia) alongside cafes and fast-food takeaways (e.g. Five Guys and McDonalds).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.

Character Area: Kings Parade: Key Characteristics: 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.

Character Area: Regent Street: Key characteristics: 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.

Character Area: Bridge Street: Key characteristics: 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.

Customer Views and Behaviour

1.169 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.

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%).

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%
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%

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

1.170 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.

1.171 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.

1.172 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.

1.173 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.

1.174 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

Unit Type	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 Town Centre Walkarounds (conducted November 2019)

Table 5.8: Fitzroy / Burleigh Street Composition by Floorspace

Unit Type	Floorspace (sqm)	%	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 Town Centre Walkarounds (conducted November 2019)

1.175 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.

1.176 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

1.177 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

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

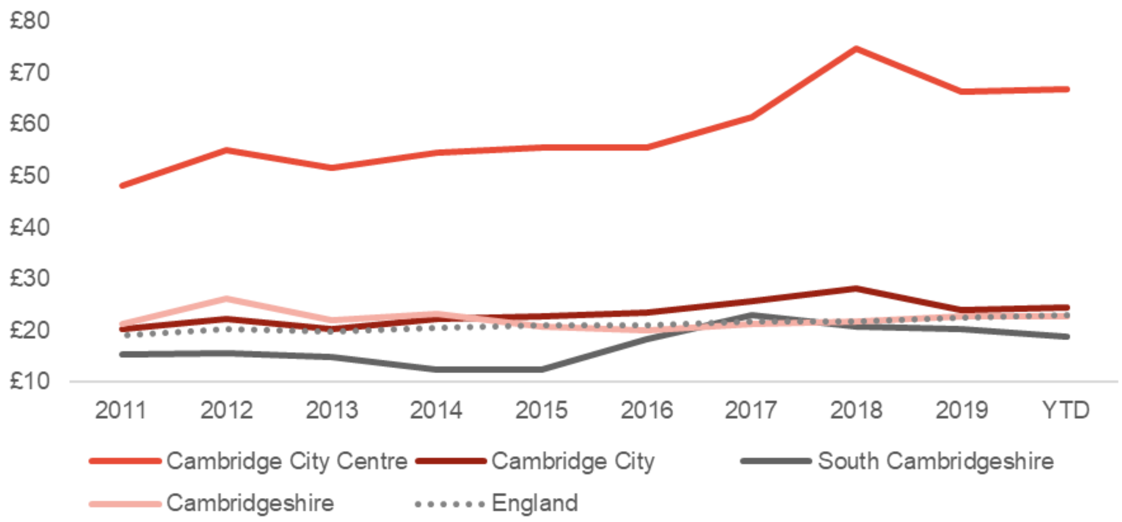
xv. The in-centre visitor survey sought to understand linked trips between the Grafton Centre and the historic core. When asked whether they would also visit the historic core on the same day/outing as their visit to the Grafton Centre, 21% stated that they had/would.

Recent Commercial Market Performance

1.178 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).

1.179 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.

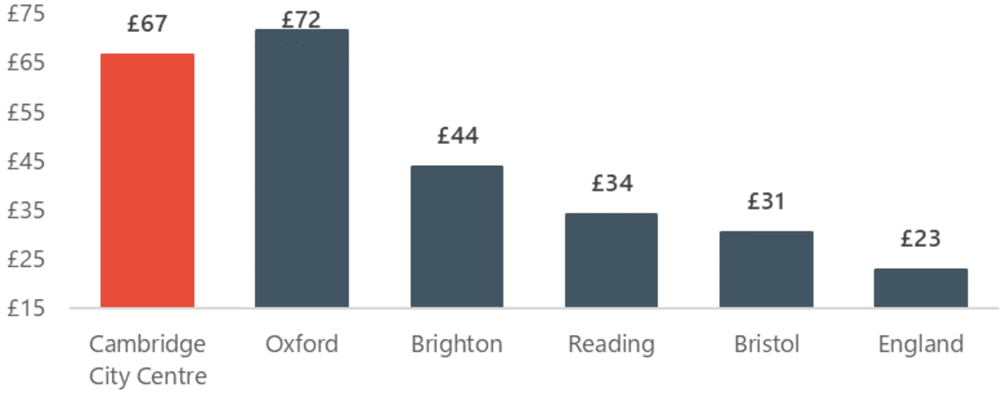
Figure 5.4 Retail Rent per Square Foot, 2011-2020



Source: CoStar, 2020

1.180 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).

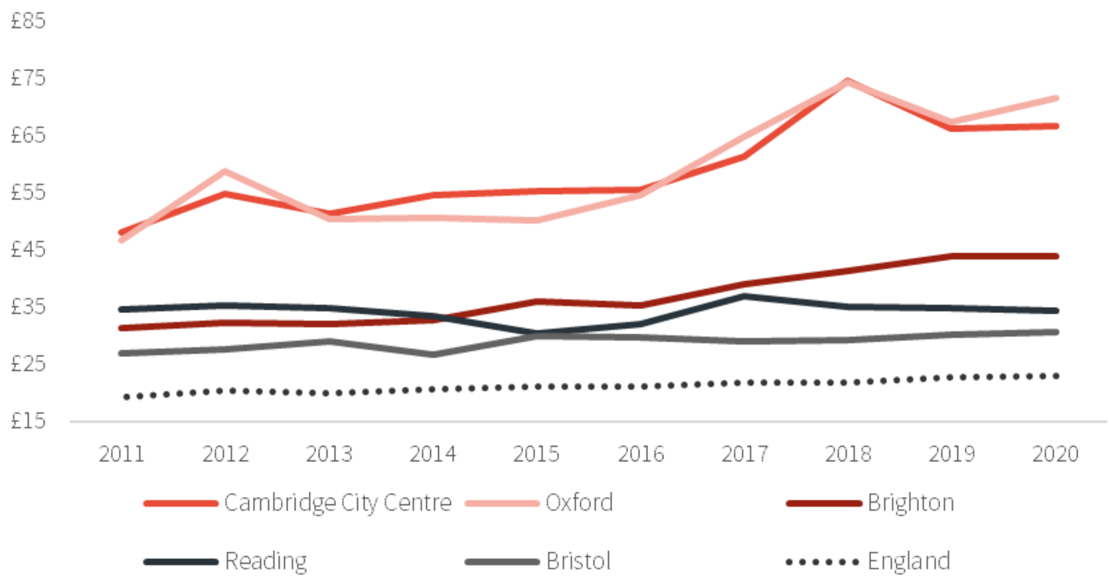
Figure 5.5 Retail Rental Values per Square Foot across Comparator City Centres, 2020



Source: CoStar, 2020

1.181 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.

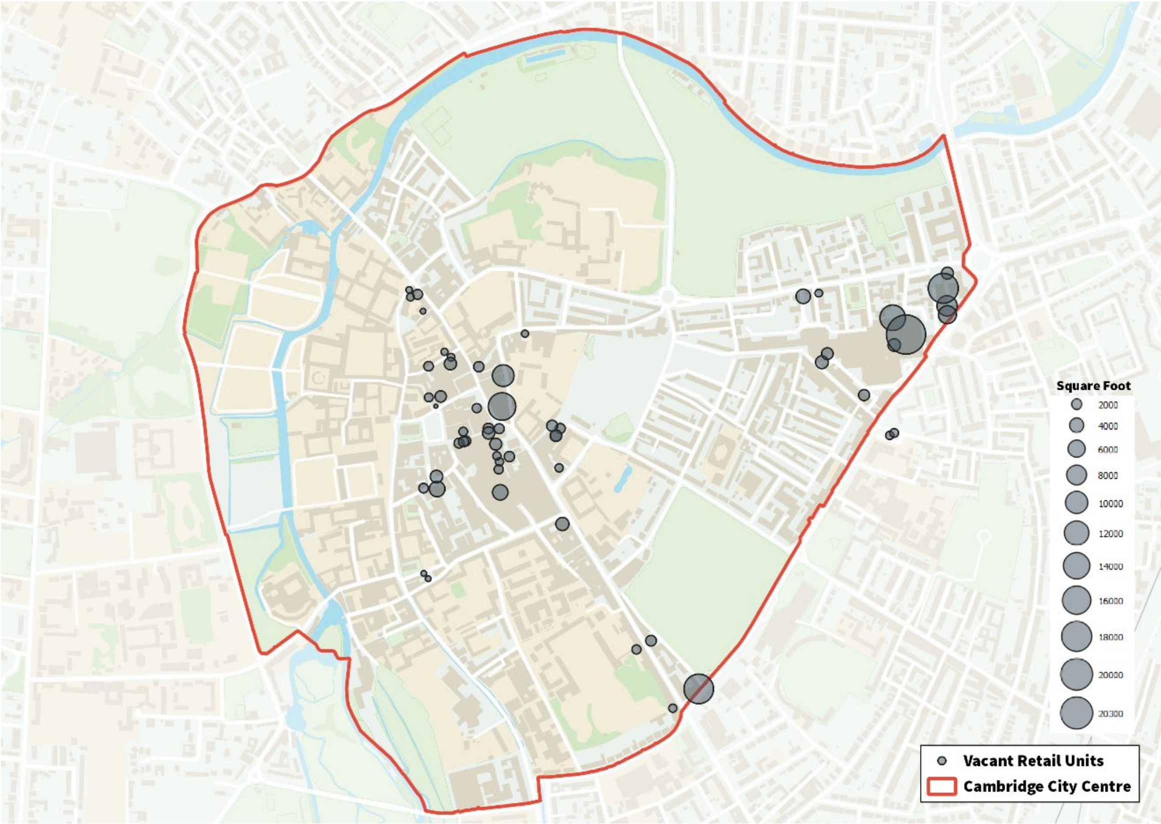
Figure 5.6 Retail Rental Values across comparator cities, 2011-2020



Source: CoStar, 2020

1.182 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 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.

Cambridge District and Local Centres

1.183 There are a number of smaller District and Local Centres which provide a local retail presence amongst suburbs outside Cambridge City Centre. This section sets out the composition and current performance of these Centres. The research and analysis in this section is led and reported by Hatch.

1.184 There is limited published data available (given their overall size), so Hatch undertook detailed on-site surveys of each Centre to record the type of unit present and its overall characteristics. Given the passage of time, and the need to update following the Covid-19 pandemic, the composition analysis has been updated by Greater Cambridge Shared Planning in late 2020, Spring 2021, Autumn 2021 and Autumn 2022. The findings are set out at the end of this section.

6.1: Recommended Retail Hierarchy from 2013 Retail Study

City Centre

- Cambridge

District Centres

- Mill Road East
- Mill Road West
- Mitchams Corner
- Arbury Court
- Cherry Hinton High Street
- Histon Road

Local Centres

- Arbury Road / Milton Road
- Barnwell Road
- Cherry Hinton Road West
- Cherry Hinton Road East
- Hills Road
- Newnham Road
- Trumpington

Optional Neighbourhood Centres

- Adkins Corner
- Akeman Street
- (Campkin Road
- Chesterton High Street
- Ditton Lane
- Fairfax Road
- Grantchester Street
- Green End Road
- King Hedges Road

- Norfolk Street
- Wulfstan Way
- Victoria Road

Source: Cambridge Retail & Leisure Study Update, 2013

1.185 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.

1.186 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.

1.187 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 12 optional Neighbourhood Centres, which have a similar role to Local Centres but are smaller in size.

1.188 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 6.2: District and Local Centres Composition, 2019

Retail Centre	Convenience	Convenience	Comparison	Comparison	Service	Service	Vacant	Vacant	Leisure	Leisure	Total
Mill Road West*	13	16%	15	18%	17	20%	9	11%	29	35%	83
Mill Road East*	7	9%	20	26%	18	23%	5	6%	27	35%	77
Mitchams Corner*	7	13%	9	17%	13	25%	6	11%	18	34%	53
Cherry Hinton High Street	7	21%	8	24%	7	21%	1	3%	10	30%	33
Histon Road	7	39%	3	17%	4	22%	1	6%	3	17%	18
Arbury Court	5	26%	3	16%	5	26%	0	0%	6	32%	19
Railway Station CB1	1	10%	1	10%	0	0%	1	10%	7	70%	10
Hills Road	4	13%	5	17%	5	17%	2	7%	14	47%	30
Barnwell Road	1	11%	1	11%	4	44%	1	11%	2	22%	9
Hills Road/Cherry Hinton Road	4	12%	4	12%	5	15%	1	3%	19	58%	33
Cherry Hinton Road West	2	8%	6	25%	6	25%	1	4%	9	38%	24
Cherry Hinton Road East	7	39%	1	6%	7	39%	1	6%	2	11%	18
Arbury Road/Milton Road	4	19%	5	24%	4	19%	0	0%	8	38%	21
Newnham Road	1	10%	0	0%	2	20%	1	10%	6	60%	10
Eddington	1	9%	1	9%	0	0%	9	82%	0	0%	11
Trumpington	1	13%	1	13%	4	50%	1	13%	1	13%	8
Orchard Park	1	14%	1	14%	5	71%	0	0%	0	0%	7
Darwin Green (NIAB1)	0	0	0	0	0	0	0	0	0	0	0
UK Average	-	9%	-	30%	-	25%	-	12%	-	24%	-

Source: Hatch, 2020

1.189 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.

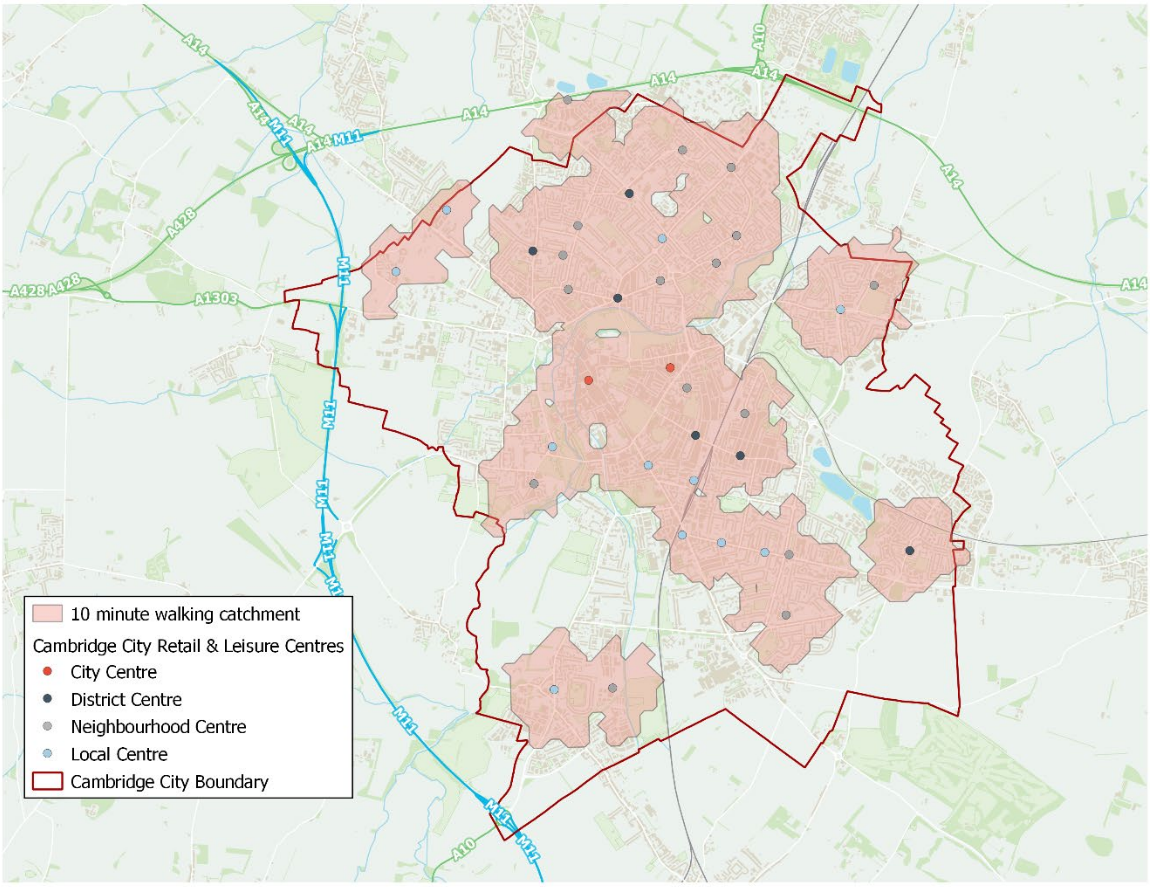
1.190 The map below (Fig.6.1, following page) highlights the spread of District and Local centres across Cambridge, and also shows 'walkable neighbourhood' areas around each centre (10 minute walk times), reflecting the coverage of town centres across Cambridge and their accessibility. It shows that 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.

Recent Change in Composition of Units

1.191 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.

1.192 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.

Figure 6.1: Walkable Neighbourhoods with Cambridge



Source: Hatch, 2019

1.193 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.

1.194 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 District and Local centres, with the city centre including 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 since previous study (Cambridge, 2013)

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
TOTAL *Also classified as District Centres in 2013 Study	1	-13	39	6

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

Update Analysis

1.195 Since the survey was completed in 2019, Greater Cambridge Shared Planning have undertaken internal reviews of the Cambridge City Centre retail units across the District, Local and Neighbourhood Centres. These surveys took place in 2020, Spring 2021, Autumn 2021, Autumn 2022, Autumn 2023 and Autumn 2024, capturing changes in uses, vacancies, and opening/closing of significant retail.

1.196 The 2020 survey provided some insight into the impacts of the Covid-19 pandemic on retail within Cambridge, but the findings were limited in presenting any major changes as it was too soon after the 2019 survey to analyse the vacancy rates and change of uses. Overall, for 2020 the district and local centres remained predominantly occupied by convenience and service and leisure provision. Some convenience units became vacant in 2020, but this equalled out with previously vacant uses becoming occupied with convenience use.

1.197 The Spring 2021 survey showed that there was a continued range in uses, with convenience and service & leisure remaining as the most common uses with little change in numbers. The data showed that most of the units that were vacant in 2020 remained vacant, with two units converting into residential use. There were some new comparison units, such as a glass/window salesroom, and a blinds/shutters and awnings salesroom, however, several other comparison units became vacant.

1.198 The Autumn 2021 survey highlighted several units changing to convenience use from vacant, with overall more convenience, service and leisure units than Spring 2021. A number of Centres had large units divided into smaller units with different uses for example, Adkins Corner was re-developed into a takeaway, dry cleaners, hairdresser and supermarket to replace the former Budgens supermarket. During this period, several buildings under construction/redevelopment were completed, including The Tivoli public house and two bar/restaurants were opened in Eddington.

1.199 The Autumn 2022 survey saw a few changes of occupants in convenience, service and leisure units, with vacant numbers remaining the same as Autumn 2021. There were a number of new cafes, bakeries, restaurants/takeaways, estate agents and barbers. There were also new comparison uses including a specialist furniture upholstery business.

1.200 This survey included an assessment of potential new Centres including Brookgate, Railway Station (CB1), Orchard Park, and other South Cambridgeshire Rural Centre locations including Cambourne, Great Shelford & Stapleford, Histon and Impington, Northstowe and Sawston to allow for comparison of their uses in future retail surveys.

1.201 The survey undertaken in Autumn 2023 remained largely the same from the 2022 survey, with new cafes in Mill Road East and Mill Road West. Mitcham's Corner had four units become vacant, as well as two new takeaways and a new dentist. Chesterton High Street had a unit changed to residential housing, alongside new a new vacant unit. Cherry Hinton Has three units temporarily vacant, relocated to Colville Road.

1.202 The Autumn 2024 survey identified a few changes in unit use, with new cafes, restaurants/takeaways, barbers, office pace and gyms. Vacancies remained relatively similar from the previous year; however, the new Centre of Orchard Park saw an increase in unit vacancy, as did Mitcham's corner. The Railway Station (CB1) and Eddington saw an increase in retail units in 2024.

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.

South Cambridgeshire Rural Centres

1.203 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.

1.204 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.

1.205 Within the South Cambridgeshire Local Plan, villages have been divided into four different groups depending on their relatively 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.

7.1: South Cambridgeshire Town Centre Hierarchy

Typology: Rural Centres

Centres:

- Cambourne
- Cottenham
- Great Shelford and Stapleford
- Histon and Impington
- Sawston

Description: 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.

Typology: Minor Rural Centres

Centres:

- Bar Hill
- Bassingbourn
- Comberton
- Fulbourn
- Gamlingay
- Girton
- Linton
- Melbourn
- Milton

- Papworth Everard
- Swavesey
- Waterbeach
- Willingham

Description: Have a lower level of services, facilities and employment, and often perform a role in providing services and facilities for a small rural hinterland.

Group Villages (total number: 34)

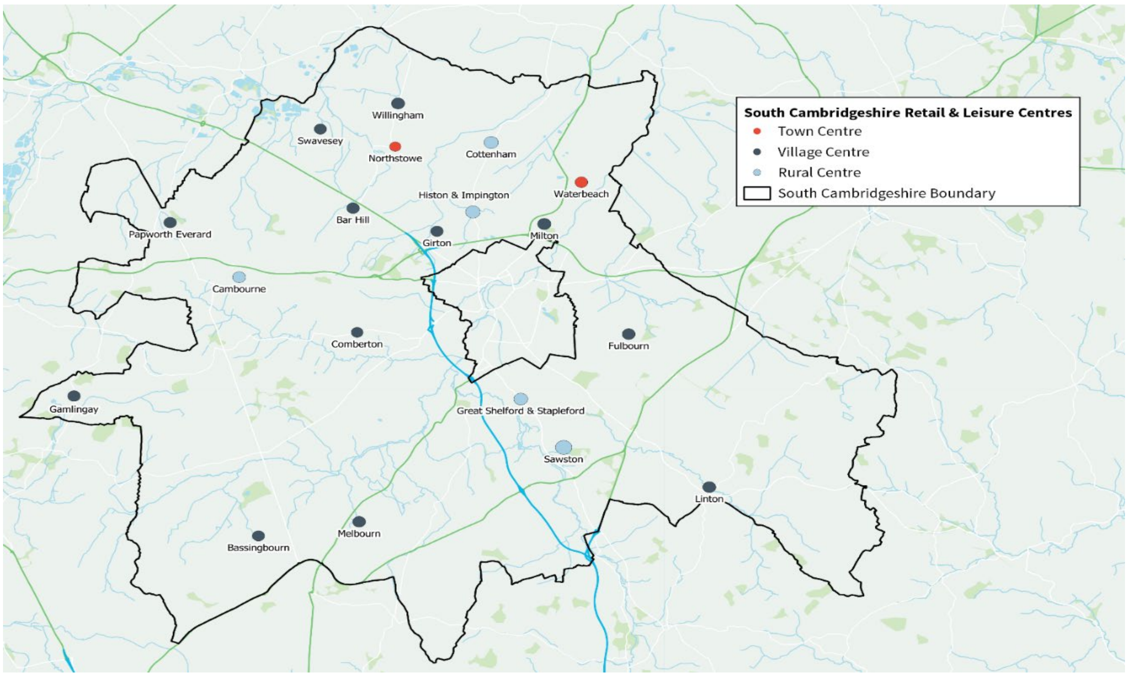
- Have fewer services and facilities, only meeting some of the basic day-to-day requirements for residents.

Infill Villages (total number: 57)

- 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 Town Centres



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

Town Centres

1.206 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) alongside two new retail centres that will be delivered in South Cambridgeshire. Given the size of their development, it is expected these will be designated, along with Cambourne 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

1.207 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 (in terms of number of retail units) and also provides the highest proportion of service units (at 63% of all units).

1.208 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. 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. The designation of a town centre boundary to focus the location of town centre uses in one area should also be considered.

1.209 Since the previous Retail Study was undertaken, there has been a noticeable shift away from convenience and comparison retail to service and leisure uses in a number of South Cambridgeshire's rural centres and minor rural centres, reflecting the trend also experienced in Cambridge City.

1.210 The retail survey undertaken in Autumn 2024 by Greater Cambridge Shared Planning showed no change in the unit use for Cambourne from the previous year, with Cambourne having a variety of services including cafes, supermarket, dry cleaners, takeaways, barbers and vets.

Table 7.2: South Cambridgeshire Rural Centres Composition 2019

Rural Centre	Convenience	Convenience	Comparison	Comparison	Service	Service	Vacant	Vacant	Leisure	Leisure	Total
Sawston	6	10%	7	12%	37	63%	4	7%	5	8%	59
Histon & Impington	5	14%	4	11%	19	51%	2	5%	7	19%	37
Great Shelford & Stapleford	3	10%	2	7%	16	53%	2	7%	7	23%	30
Cottenham	9	27%	3	9%	15	45%	2	6%	4	12%	33
Cambourne	1	5%	3	16%	10	53%	5	26%	0	0%	19
Rural Centre Average	24	13%	19	11%	97	54%	15	8%	23	13%	178
UK Average	-	9%	-	30%	-	25%	-	12%	-	24%	-

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

Change Since Previous Study

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
Total	-10	-28	15	8

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

Minor Rural (Village) Centres

1.211 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.

1.212 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 7.4: South Cambridgeshire Minor Rural Centre Composition 2019

Minor Rural Centre	**Convenience**	**Convenience**	**Comparison**	**Comparison**	**Service**	**Service**	**Vacant**	**Vacant**	**Leisure**	**Leisure**	**Total**
Milton	3	13%	5	21%	10	42%	1	4%	5	21%	24
Willingham	3	14%	1	5%	9	41%	2	9%	7	32%	22
Linton	5	24%	5	24%	6	29%	1	5%	4	19%	21
Fulbourn	4	21%	7	37%	2	11%	1	5%	5	26%	19
Melbourn	4	22%	2	11%	8	44%	1	6%	3	17%	18
Gamlingay	3	19%	3	19%	6	38%	0	0%	4	25%	16
Bar Hill	3	19%	3	19%	7	44%	0	0%	3	19%	16
Waterbeach	3	19%	1	6%	7	44%	1	6%	4	25%	16
Papworth Everard	1	7%	5	33%	5	33%	0	0%	4	27%	15
Girton	1	8%	3	23%	5	38%	1	8%	3	23%	13
Swavesey	2	18%	2	18%	4	36%	1	9%	2	18%	11
Bassingbourn	1	9%	1	9%	4	36%	1	9%	4	36%	11
Comberton	2	33%	0	0%	3	50%	0	0%	1	17%	6
Minor Rural Centre Average	35	17%	38	18%	76	37%	10	5%	49	24%	208
UK Average	-	9%	-	30%	-	25%	-	12%	-	24%	-

Source: Hatch Site Visits (November 2019)

Table 7.5: South Cambridgeshire Minor Rural Centre Composition Change (where possible)

Change Since Previous Study, 2008-19

Area	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
Total	-1	-9	7	2

Source: Hatch 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.

Strategic Sites

1.213 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.

1.214 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

1.215 On 1st 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.

1.216 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. The permission has not been implemented.

1.217 Since this permission, a new planning application (Ref: 23/02685/FUL) was validated in July 2023. The planning application proposes the redevelopment of the Grafton Centre from a predominantly retail/leisure destination to a mix of life sciences (research and development), hotel and retail/leisure uses. The proposals also include public realm enhancements and permeability improvements, opening up the Site to adjoining streets.

1.218 The submitted Retail Assessment explains that following the proposed development there will be a reduction of 20,970 square metres gross of retail and other main town centre use floorspace across the Grafton Centre; decreasing from 33,599 square metres gross to just 12,629 square metres gross. The existing cinema and gym (4,869 square metres gross total) (included within the 12,629 square metres gross) will be retained on site. The proposals will retain retail floorspace around the west entrance, continuing to form part of, and integrating with, the existing shop frontages outside the Grafton Centre on Fitzroy Street and Burleigh Street.

Cambridge Bio-Medical Campus, Area of Major Change

1.219 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.

1.220 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 square metres 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'.

1.221 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 square metres gross floorspace.

1.222 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.

1.223 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 square metres;
- An Amenities Hub of 3,261 square metres;
- Multi storey car park; and
- Temporary multi-use games area.

1.224 A new train station within the Cambridge Bio-Medical Campus is due to open in summer 2025. Operated by Greater Anglia the station will serve the campus and the adjacent Trumpington suburb and link to Cambridge City Centre and further afield including London and the wider national railway network. The station will support continued growth and investment.

1.225 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.

1.226 The Cambridge Bio-Medical Campus highlights significant investment in Greater Cambridge in the pharmaceutical, health and medical research and development sectors. The area is growing in terms of employees and workforce, contributing to population growth in the southern fringe area. The representation of retail and food and beverage units has increased over time at CBC, with a number located on the ground floor within Addenbrooke's Hospital.

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

1.227 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.

1.228 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.

1.229 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.

1.230 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)

1.231 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 square metres gross of floorspace at ground floor level, within the South Block. This will include one ‘anchor store’ (310 square metres gross) and two smaller units (80 and 60 square metres gross)”.

1.232 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.

1.233 Clay Farm: Clay Farm benefits from an outline planning permission (07/0620/OUT) granted on the 6th of 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.

1.234 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).

1.235 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 square metres GEA;
- A1 retail: 1 unit x 200 square metres / 1 unit x 150 square metres / 2 x 100 square metres (550 square metres GEA);
- A2 financial / professional services: 2 units x 120 square metres (240 square metres GEA);
- A3 Restaurant/café: 1 unit x 200 square metres (200 square metres GEA);
- A4 Drinking establishment 1 unit x 450 square metres (450 square metres GEA);
- A5 Takeaway: 3-unit x 120 square metres (360 square metres GEA);
- TOTAL: 12 units (2,300 square metres GEA)

- D1 Nursery: 1 x 600 square metres (600 square metres GEA)
- D1/sui generic alternative health treatment: 1 x 150 square metres (150 square metres GEA)
- Grand Total 14 units (3,050 square metres GEA)

1.236 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.

1.237 In November 2021, a full application reference 21/04795/FUL was approved for the amalgamation of two Retail Units at Hobson's Square Local Centre Parcel 8B, previously consented under reserved matters reference 15/0844/REM. The full application proposed the amalgamation of the convenience store and one of the retail units to create a single store of 496sqm. The application also made amendments to the servicing layby and details of operating hours for the retail units.

Northeast Cambridge (NEC), Area of Major Change (Draft Area Action Plan)

1.238 North-East Cambridge (Hartree) 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 (Regulation 19, November 2021) 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.

1.239 The Proposed Submission version has been approved for public consultation but is dependent on the approval of the Wastewater Treatment Plant (WWTP) Development Consent Order (DCO). The consultation process is therefore paused.

1.240 Five new centres (1 District and 4 Local) are planned within Northeast Cambridge to create active, lively focal points for new and existing residents and workers.

1.241 The draft AAP sets out that NEC 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 12,600 square metres gross of retail and town centre uses across the five centres, to include 3,200 square metres of convenience goods, 2,700 square metres of comparison goods, and 6,700 square metres of 'other town centre uses'. Aside from main convenience food stores, the policy applies a maximum unit size of 150 square metres gross.

1.242 Planning Application Reference 22/02771/OUT was granted planning permission following a planning appeal against non-determination (Ref: APP/W0530/W/23/3315611). The scheme includes 425 new homes and up to 53,700 square metres of Class E floorspace net, including 5,353 square metres net of ground floor Use Class E commercial space including retail, leisure and offices and Use Class F community space.

Northwest Cambridge, Strategic Site (Area Action Plan)

1.243 Located on the Cambridge City and South Cambridgeshire boundary, the site is the subject of the jointly prepared Cambridge Northwest 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 Food store 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 adaptions to Madingley Rd and Huntingdon Rd), pedestrian, cycle and vehicle routes, parking, drainage, open spaces and earthworks."

1.244 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 food store (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.

1.245 The food store and small retail unit were planned to front onto the market square. A sales area of 2,000 sqm was proposed for the food store 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 square metres GIA) to remain independent from the main food store (2,000 square metres net);
- Restricting the main food store to 'food store' use only;

- Controlling the net floorspace of the main food store to 90% convenience, 10% comparison goods.

1.246 The medium sized food store opened in September 2017 as one of the first phases of the strategic residential growth area. It is now occupied by Sainsbury's with an Argos store in the next-door retail unit. In September 2020, a new café and patisserie opened in the Market Square. In September 2021, the Hyatt Centric hotel opened providing 150 rooms alongside a lifestyle Aparthotel complex with 180 serviced apartments. As part of the complex a range of retail facilitates are provided on-site to create a contemporary visitor experience making it attractive to a wide range of users. The retail units that opened are Kota Restaurant, and Dutch Cocktail Bar. 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)

1.247 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 SS/3 ((a) - Land North of Newmarket Road & (b) Land North of Cherry Hinton) in the district and city allocations R41 and R47 adjacent to SS/3b. 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.

Land North of Newmarket Road (Policy SS/3a) "Marleigh"

1.248 In November 2016, South Cambridgeshire District Council granted outline planning permission for a parcel of land north of Newmarket Road, in Cambridge (but located within South Cambridgeshire District Council) for a residential led, mixed-use development (ref: S/2682/13/OL). The site has since been named Marleigh. The full description of development stated:

> "Demolition of existing buildings and structures, and construction of up to 1,300 dwellings, with 4ha of replacement car dealership. A primary school, community hall, food store and other shops, replacement petrol filling station, community and health uses, leisure, cultural, and business space. A recycling 'bring' site. Formal and informal public open space, including children's play areas, sports pitches, allotments, and landscaping. A mixed-use park pavilion, a sports pavilion and allotment clubhouse, the latter two with dwellings above. New amended accesses onto Newmarket Road and works to Newmarket Road. New and amended cycle and pedestrian links. Associated utilities, earth works, cycle and car parking, including underground car parking."

1.249 The mixed-use residential led scheme received planning permission for:

- Up to a maximum of 1,300 dwellings (Class C3).
- Foodstore (A1) - Up to 1,500sqm gross internal floorspace. This includes a retail area with several units including a Co-Op/food store measures approx. 391sqm internal floorspace.
- Local centre: up to 3,000 square metres gross floorspace (Use Class A1/A2/A3/A4/A5/B1a/D1/D2). This includes a community hall (Class D2): up to 210 square metres (within 3,000 square metres gross above).
- Primary School 2FE

1.250 In March 2023, an EIA Screening Opinion was submitted for Marleigh Phase 3 for an additional 268 residential dwellings above the 1300 dwellings consented.

1.251 Much of the scheme is now completed, with Jubilee Square forming the heart of the new Marleigh community, offering a new community centre, Primary Academy School, Co-op food store, café and modern office spaces.

Land North of Cherry Hinton (Policy SS/3b and city allocations R41 & R47) "Springstead Village"

1.252 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 Coldham's 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."

1.253 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 square metres 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 square metres).
- Community hall (Class D2): up to 250 square metres (within 1,850 square metres gross above).
- Primary School 2FE.
- Secondary School 6FE.

1.254 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 square metres gross internal floorspace. This includes a food store (A1) up to 500 square metres gross internal floorspace, a community hall up to 250 square metres gross, and other non-residential institutions, community, leisure and education within Use Class D1/D2.

1.255 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.

1.256 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.

1.257 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. The site has since been named Springstead Village.

1.258 Cambridge East currently has committed retail/town centre floorspace of 1,850 square metres 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 local centres to serve the remaining 7,000 planned additional new homes within the AAP area. However, no further planning applications or planning permissions, across the remainder of the safeguarding land within the AAP area have been submitted (January 2023).

West Cambridge, Area of Major Change

1.259 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 16th June 2016 (Ref: 16/1134/OUT) for:

"up to 383,300m2 of development comprising up to 370,000m2 of academic floorspace (Class D1 space), commercial/research institute floorspace (Class B1b and sui generis research uses), of which not more than 170,000m2 will be commercial floorspace (Class B1b); up to 2,500m2 nursery floorspace (Class D1); up to 1,000m2 of retail/food and drink floorspace (Classes A1-A5); up to 4,100m2 and not less than 3,000m2 for assembly and leisure floorspace (Class D2); up to 5,700m2 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."

1.260 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 square metres to 4,000 square metres. 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.

1.261 Whilst Cambridge City Council's Planning Committee voted to approve those plans in 2021, formal planning permission could not be issued until outstanding queries around water supply across Greater Cambridge were addressed. Planning permission was eventually issued in June 2024 following the establishment by the Government of a Water Scarcity Group for Cambridge with £8million of initial funding.

Darwin Green, Land Between Huntingdon Road and Histon Road

1.262 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.

1.263 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 18th 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."

1.264 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 food store of approximately 1,200 square metres, and up to six retail/service units of approximately 100 square metres each.

1.265 At the same time, on December 18th, 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)

1.266 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 square metres), health centre (710 square metres), community rooms (200 square metres) and retail (500 square metres). This is alongside the supermarket approved in the original outline planning permission. Committed retail floorspace at Darwin Green is 1,700 square metres gross.

1.267 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.

1.268 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, with some retail units built but unoccupied, and whilst there remains the plan to provide a supermarket this has not yet been delivered. The Community Rooms are built and in use.

Station Areas West and Clifton Road, Area of Major Change

1.269 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 square metres of Class B1a (Office) floorspace; 5,255 square metres 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 square metres D1 (community room); 1,753 square metres 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.'

1.270 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 square metres 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, Greggs, Wasabi, Pret a Manger, Sainsbury's Local, M&S Simply Food, Tesco Express, Chill #2 within the Ibis Hotel, Rutland Cycle Shop and Station Tavern along with several food truck stands for traders. Nearby the Tawa Indian restaurant and Malloy's Craft Butchery also operate. Other businesses located at Brookgate include The Co-Operative Food, Costa, a barbers, a training gym and a restaurant.

Orchard Park, Strategic Site

1.271 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 square metres 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."

1.272 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.

1.273 The wider development is complete and occupied, and the Local Centre is open and trading, with businesses including Pizza Hut, a Barbers hair salon, a Tesco Express convenience store, take-away and charity shop.

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

1.274 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 26-27,000 people, and a small network of town and local centres.

1.275 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. Between 2016 and 2014, 1,480 new homes have been delivered.

1.276 The local centre has permission to include 1,500 square metres net of retail, plus a further 450 square metres 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.

1.277 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 square metres of town centre uses (Use Class A1/A2/A3/A4/A5/D1 and D2), and 21,200 square metres of employment uses (Use Class B1):

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

1.278 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.

1.279 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.

1.280 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 square metres net to a minimum of 7,375 square metres net and a maximum of 12,000 square metres net is confirmed; whilst ‘food, drink and leisure uses’ and the ‘civic hub and community uses’ remain the same at 13,500 square metres net and 9,000 square metres net respectively. Use Class B1 employment is recorded in the new and up-to-date Town Centre Strategy as being 16,200 square metres net.

1.281 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 food store (615 square metres), local shops and services (2,530 square metres), and employment B1 (5,882 square metres) 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.

1.282 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.

1.283 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).

1.284 Based on a future population of around 26-27,000 people, we conclude that Northstowe would generate additional convenience goods spend of around £50.4m (£1,939 per head). If the store had a trade retention of between 20% and 50%, the settlement could support a small food store of around 800-2,000 square metres net (c.£12-13,000 per square metres net).

Waterbeach, New Settlement Strategic Site

1.285 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 landowners adjoining the former Army Barracks in the eastern part of the site.

1.286 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.

1.287 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 accept for the first primary junction from the A10."

1.288 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 square metres 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 square metres. The supporting appendices suggest there will be 2 food stores across a district and local centre;
- Assembly and Leisure – up to 7,000 square metres for health and fitness, gym and other cultural and recreational uses (Class D2);
- Hotel accommodation – up to 4,000 square metres (Class C1).

1.289 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."

1.290 The Waterbeach New Town East site is proposed to provide up to 9,000 square metres gross of 'A' Class floorspace as follows:

- Convenience retail: up to 3,500 square metres gross
- Comparison retail: up to 3,000 square metres gross
- Other Use Class A: up to 2,500 square metres gross

1.291 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.

1.292 Similar to Northstowe, Waterbeach is expected to deliver a future population of around 26-27,000 people. We conclude that Waterbeach would generate additional convenience goods spend of around £50.4m (£1,939 per head). If the store had a trade retention of between 20% and 50%, the settlement could support a small food store of around 800-2,000 square metres net (c.£12-13,000 per square metres net).

Bourn Airfield, New Settlement Strategic Site

1.293 Bourn 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 14th January 2021].

1.294 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. 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.

1.295 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).

1.296 Located immediately adjoining the site to the west is a further employment site; and the proposed Bourn New Village. The planned new settlement is expected to accommodate up to 3,500 new homes, including a village centre and local hub with the planning application (S/3440/18/OL) submitted in 2018, and since granted planning permission in July 2024. A new Local Centre as part of the Bourn New Village will be delivered, including up to 4,000 square metres GEA of Use Class E retail and leisure uses, with no single unit being larger than 1,500 square metres GEA.

Cambourne West, Sustainable Village Strategic Site

1.297 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."

1.298 The supporting Design & Access Statement confirmed that [emerging] Policy SC/4 requires a convenience shopping store of up to 500 square metres 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 square metres 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).

1.299 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.

1.300 More recently, reserved matters, including details of retail floorspace, was approved in June 2020. The Reserved matters application (Ref: 20/01640/REM) related to a parcel of land located in Sheepfold which is in the northeast 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 square metres of retail floorspace in the form of 10 units.

1.301 Cambourne West has planning permission for 617 square metres 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, including in the area of Swansley.

1.302 Moving forwards, the settlement pattern at Cambourne is sporadic and with the potential introduction of a fourth village and a new train station, it may be appropriate to explore the configuration and location of the retail/food store offer. We return to this in the final recommendations.

Beehive Centre

1.303 A planning application has been submitted for the redevelopment of the out-of-centre Beehive Centre/Retail Park on the outskirts of Cambridge City (App Ref: 23/03204/OUT). Submitted by Railway Pension Nominees Limited, the planning application seeks permission for the following development:

> "The demolition and redevelopment of the Beehive Centre, including in Outline Application form for the demolition and redevelopment for a new local centre (E (a-f), F1(b-f), F2(b,d)), open space and employment (office and laboratory) floorspace (E(g)(i)(ii) to the ground floor and employment floorspace (office and laboratory) (E(g)(i)(ii) to the upper floors; along with supporting infrastructure, including pedestrian and cycle routes, vehicular access, car and cycle parking, servicing areas, landscaping and utilities.

1.304 The Development comprises the demolition of the retail park, and redevelopment to include a new local centre and office and laboratory space. Eleven new buildings for life-science, innovation and office uses are proposed, alongside the new Local Centre. The TCRPS states that the proposed local centre will comprise a mix of uses at ground floor level, including a convenience store(s), comparison units, cafes and restaurants, leisure facilities and health and wellbeing establishments. The Local Centre is intended to serve both the people employed within the application site and existing local residents in the immediate vicinity of the Site.

1.305 The illustrative scheme highlights the new Local Centre as including the following town centre uses:

- Class E(a) convenience floorspace – 1,542 square metres
- Class E(a) comparison floorspace – 795 square metres
- Class E(b) restaurants and cafes floorspace – 2,794 square metres

1.306 In total, the planning application proposes a total floorspace of 5,131 square metres within Classes E(a) and E(b). This is a reduction at the Beehive Centre of c.17,500 square metres of Class E(a) and E(b) floorspace when compared with the existing retail park on the Site (22,637 square metres).

Housing Delivery and Population Growth

1.307 The Council have provided the planned housing trajectory and population growth forecasts to include the strategic sites to the period 2045 and beyond, based upon the emerging Local Plan First Proposals (2021). We summarise these in Table 8.1 below, which demonstrates a total population growth of 140,500 to the period 2045, and an additional 87,000 beyond 2045.

1.308 Population growth beyond 2041 is accounted for by the completion of new settlements at Northstowe, Waterbeach, Bourn Airfield, NE Cambridge, NW Cambridge, Cambridge East and the extension to Cambourne. These sites will deliver population prior to 2041 and also beyond and can be viewed as long term delivery projects. NE Cambridge, NW Cambridge, Cambridge East and the extension to Cambourne will not deliver any new housing until post 2031.

Table 8.1: Strategic Site Population Growth

Greater Cambridge Growth	Population Growth 2021-2041	Population Growth Post 2041	Population Growth Full Build Out
Cambridge and SCDC (to 2041 and beyond)	140,500	87,000	227,500

Summary

1.309 Table 8.2, 8.3 and 8.4 below summarise planned, committed and completed development coming forward on development plan strategic site allocations. The analysis confirms that there is:

- c.21,600 square metres gross of planned retail and town centre floorspace across Greater Cambridge, plus a Local Centre at Bourn 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.80,000 square metres gross of committed retail and town centre floorspace, with the largest concentrations at Waterbeach and Northstowe
- c.12,000 square metres gross of completed retail and town centre floorspace, including one larger food store at Eddington, Northwest Cambridge, occupied by Sainsbury's and another Sainsbury's at Hobson's Square Local Centre.

1.310 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).

1.311 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 square metres gross, which might include a larger scale food store reaching a wider than local catchment area.

Table 8.2: Planned Development

Strategic Site Allocation

- The Fitzroy/Burleigh Street/Grafton Area of Major Change (AOMC)
  - Floorspace/land use: Mix of comparison retail and leisure uses up to 12,000 square metres gross through masterplanning[3]
- Northeast Cambridge (NEC) Draft AAP
  - Floorspace/land use: Draft AAP x District Centre and 4 x Local Centres. 3,200 square metres gross (convenience) / 2,700 square metres gross (comparison) / 6,700 square metres gross ('other') / Total: 12,600 square metres gross
- Darwin Green 2, site allocation SS/2
  - Floorspace/land use: 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.
  - Floorspace/land use; Up to 12,000 new homes, with several local centres. Marleigh local centre is nearly completed (see Table 8.4) & Springstead Village local centre has outline planning permission (see Table 8.3). The remainder of the site (approx. 7,000 dwellings) is expected to come forward post 2031 with the likelihood of a greater level of retail and town centre floorspace.
- Waterbeach (East) S/2075/18/L – Undetermined
  - Floorspace / Land Use: 1 x District Centre and 1 x Local Centre: 3,500 square metres gross – convenience: 3,000 square metres gross – comparison: 2,500 square metres gross – 'other' Use Class A
- Bourn Airfield Site allocation SS/7, S/3340/18/OL – undetermined
  - Planned ned Bourn 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.

Note: Site Allocation Unimplemented or Planning Application Validated but Undetermined.

8.3: Committed Development

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[3] FBGA forms part of the 2018 Local Plan, based on the 2013 evidence base and levels of identified need at that point in time. There is no longer need for this level of retail floorspace in Greater Cambridge and should not be carried forward into the new Local Plan.

Strategic Site Allocation

- Grafton/Fitzroy: 19/0512/FUL
  - Floorspace/land use: 1 x Hotel / 1 x Ancillary Restaurant

- West Cambridge: 16/1134/OUT
  - Floorspace/land use: Up to 1,000 square metres retail, food and beverage (A1-A5)

- Cambridge East 18/0481/OUT
  - Floorspace/land use: Springstead Village: 1 x Local Centre with up to 1,850 square metres gross A1-A5, B1a, D1 and D2; Including food store no more than 500 square metres gross.

- Cambridge Bio-medical Campus 06/0796/OUT
  - Floorspace/land use: On-Site Amenities Hub 3,261 square metres gross

- Darwin Green 1 C/07/0003/OUT and S/0001/07/F: 15/1670/REM
  - Floorspace/Land use: 1 x Local Centre. To include 1 x food store (1,200 square metres gross). To include 500 square metres gross retail unit.

- Waterbeach (West) S/0559/17/OL
  - Floorspace/Land use: 16,500 square metres gross A1-A5. 1 x District Centre / 1 x Local Centre. No single unit larger than 4,000 square metres / 2 x food store

- Bourn Airfield Site Allocation SS/7: S/3440/18/OL
  - Floorspace/land use: Planned Bourn 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.

- Cambourne West s/2903/14/OL/20/1640/REM
  - Floorspace/land use: Outline planning permission – 1,500 square metres gross A1-A5; Reserved Matters Permission – 617 square metres gross A1-A5

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

Note: Planning application approved, but development not yet implemented

8.4: Completed Development

Strategic Site Allocation

- Station Areas: 08/0266/OUT
  - Floorspace/land use: 5,255 square metres gross A1/A3/A4/A5, anchored by Sainsbury's Local and M&S Simply Food

- Southern Fringe
  - Floorspace/land use: Trumpington Meadows. (S/0054/08/O) / (S/2647/16/REM) 450 square metres retail including 1 x food store (Sainsbury's Local) plus 2 x small units. Clay Farm (07/0620/OUT) / (14/1201/REM) 1 x Local Centre: 2,300 square metres GEA, 12 units, including 1 x food store 500 square metres GEA occupied by Nisa. (15/0844/REM) / (21/04795/FUL). Amalgamation of convenience store unit and one additional retail unit to create a single store of 496 square metres. Now occupied by Sainsburys Local.

- Northwest Cambridge (Eddington) 11/1114/OUT and S/1886/11. Superseded by: S/2036/13 & 13/1748/RM.
  - Floorspace/land use: 1 x Food store, 2,000 square metres net (Sainsbury's). 1 x Retail Unit 175 square metres gross

- Orchard Park S/2379/01/0
  - Floorspace/land use: 0.56 hectares of Local Centre facilities. A1-A5 and D2; One Stop convenience store open and trading.

- S/2682/13/OL and S/1096/19/RM
  - Floorspace/land use: Cambridge East. Marleigh: The local centre which includes a small food store is open.

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

Quantitative Need

1.312 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, from the baseline year 2023, and incorporating interim years of 2025, 2030 and 2035. The quantitative tabulations accompanying this assessment are set out in Appendix 1 (convenience) and 2 (comparison).

1.313 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 economic uncertainty discussed in Section 3; Experian confirm that all forecasts will be subject to greater than usual uncertainty and volatility (Experian Retail Planner, February 2024).

1.314 Overall, Experian state that the outlook for floorspace requirements has weakened, emphasising that the Covid-19 pandemic brought a change in shopping habits which favoured local high streets and suburbs over the large city centres. Looking ahead, the cost-of-living crisis is expected to persist, directly impacting convenience and comparison goods expenditure. Non-store retail sales volume growth has been revised down in line with the weaker outlook for real personal disposable incomes, albeit the market share has been upgraded, further restricting required floorspace.

1.315 These assumptions and economic forecasts have formed key inputs into the method and outputs set out in this section of the report.

Method

1.316 We have used a conventional and widely accepted step by step methodology, drawing upon the results of the household telephone survey of shopping patterns 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:

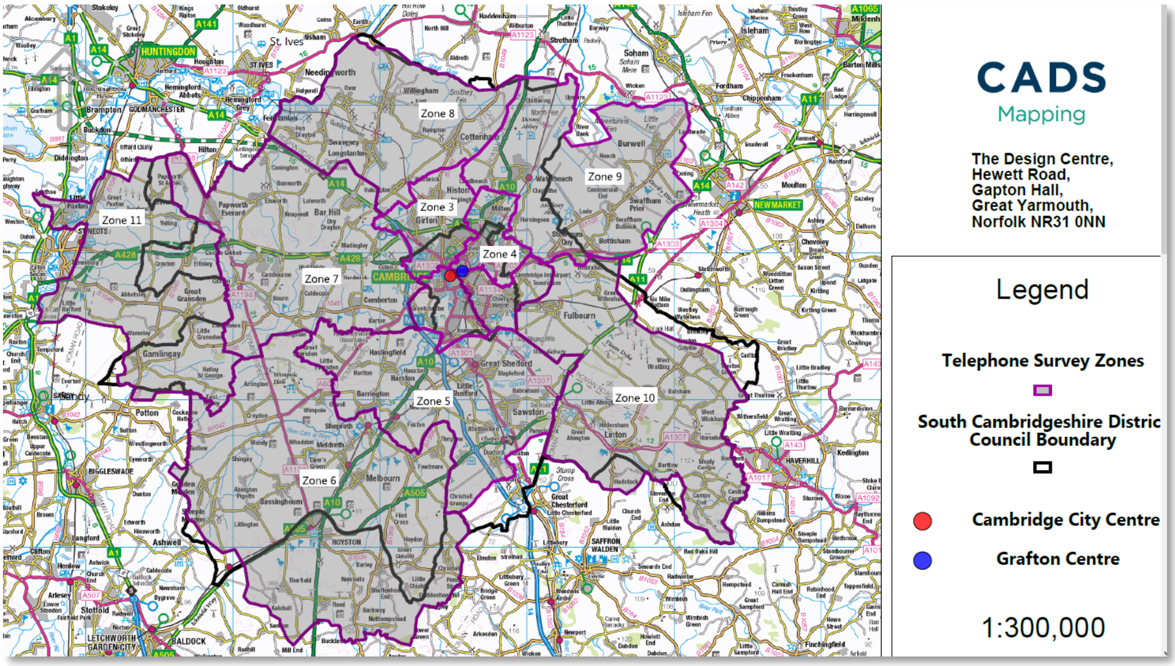
- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising the Greater Cambridge study area
- Allocated the available projected expenditure to the convenience and comparison goods shopping destinations, on the basis of the household 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

1.317 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

1.318 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 Councils' Shared Planning Service and NEMS Market Research, who undertook the interviewing and data processing. The survey area is shown below.

Figure 9.1: Household Telephone Survey Area



1.319 The survey results 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.

1.320 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 food store for each survey zone.

1.321 The household telephone survey also included seven questions on where respondents normally undertake shopping for the following comparison good 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
- Recreational and luxury goods

1.322 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

1.323 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 2023 is estimated to be 357,931, growing to 360,681 in 2025, 371,781 in 2035 and 375,261 in 2040. This represents an overall increase of 5% over the course of the assessment period.

Available Expenditure in the Survey Area

1.324 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 we have applied for SFT for convenience and comparison goods are derived from Experian Retail Planner Briefing Note 21 (February 2024).

1.325 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 wider economic circumstances. Retail spending began to falter in 2022 with cost-of-living pressures leading to an unwind in the swift bounce back which followed the easing in Covid-19 related restrictions. The subsequent two years were particularly challenging for retailers, with the UK entering into a light recession and energy bills remaining elevated.

1.326 It took until late 2024 for inflation to east back to the Bank of England's 2% target, at which point a meaningful recovery in retail sales is more likely over the next 12 months. In the longer term, sales volumes are expected to return to a stronger footing with the removal of Brexit and Covid-19 related uncertainty and a strengthening economic backdrop. However, the weakened financial positions of households, businesses and government will continue to be a constraint, leaving the level of sales in real terms below where they were at the end of 2021.

1.327 The post pandemic winddown in convenience sales volumes in 2022 was swifter than anticipated in the previous projection given a sharp rise in inflation. A further decline is anticipated in 2025 as cost-of-living pressures persist. In the longer term (2030 onwards), growth on a per head basis settles at 0.2% per annum but remain 4% lower than previously projected at the end of 2021. For convenience goods, we have applied growth rates of -3.0% in 2023; -0.5% in 2024; -0.2% in 2025; 0.0% in 2026-2030; and 0.1% in 2031-40.

1.328 Comparison sales volumes are also projected to decline in 2025. Consumer confidence is particularly low and bulky goods sales in particular are likely to suffer as consumers put off major purchases, such as the replacement of white goods. Experian state that a projected recovery gains momentum by 2025, and in the long-term (2030 onwards) growth per head averages around 3%. For comparison goods, we have applied growth rates of -3.3% in 2023; -1.2% in 2024; 2.7% in 2025; 3.1% in 2026-30 and 2.8% in 2031-40.

1.329 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, from the 2023 baseline. 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 £674.4m. This is forecast to grow to £680.5m by 2030, £687.6m by 2035 and to a total of £695.2m by 2040. This equates to an overall growth of £14.8m between 2023 and 2040 (Appendix 1, Table 4).
- Comparison goods expenditure within the survey area at 2023 is £980.8 million. This is forecast to grow to £968 billion by 2025, £1.113 billion by 2030, £1.270 billion by 2035, to a total of £1.459 billion by 2040. This equates to an overall growth for comparison goods expenditure in the

survey area of £478 million between 2023 and 2040 (49% growth) (Appendix 2, Table 4).

1.330 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, particularly in the current economic turmoil.

Convenience Goods Assessment – Cambridge City Council

Turnover/Shopping Patterns

1.331 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 food stores/food superstores. Table 9.1 below lists the most popular food stores 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 by the Aldi Histon Road district centre store.

1.332 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 food store.

Table 9.1: Most Popular Food stores in Cambridge City Council by Turnover, 2023

Number	Store	Turnover (£m)	Sequential Location
1	Sainsbury's Superstore, Coldham's Lane	£44.9m	Out-of-Centre
2	Waitrose, Trumpington	£44.6m	Out-of-Centre
3	Asda, Beehive Centre	£31.5m	Out-of-Centre
4	Tesco Superstore, Cheddars Lane	£30.3m	Out-of-Centre
5	Aldi, Histon Road, Cambridge	£30.1m	District Centre
6	Waitrose (Little), The Grafton Centre	£10.9m	City Centre
7	Sainsbury's Superstore, Eddington	£9.1m	Local Centre
8	M&S Simply Food, Beehive Centre	£5.8m	Out-of-Centre
9	Co-Op, Mill Road East	£5.5m	District Centre
10	Sainsbury's, Sidney Street, Cambridge	£5.5m	City Centre
11	Co-Op, Mitcham's Corner	£4.2m	District Centre
12	Co-Op, Hills Road/Cherry Hinton Road	£3.9m	Local Centre

Number	Store	Turnover (£m)	Sequential Location
13	Co-Op, Arbury Road/Milton Road	£3.8m	Local Centre
14	Tesco Express, The Grafton Centre	£3.7m	City Centre
15	M&S Simply Food, Market Hill/Square	£3.6m	City Centre
16	Sainsbury's Local, Mill Road West	£3.6m	District Centre
17	Cambridge City Centre Historic Core (Other)	£3.3m	City Centre
18	Budgens, Arbury Court	£3.0m	District Centre

1.333 Within the survey area (Zones 1-11), the city-wide network of food stores combined (listed in Table 5, Appendix 1) have a market share of 40.9% (£278.1m). 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 food stores 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 food stores in Cambridge therefore have a lower market share of 43.4% within this zone.

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

Zone 1: Sainsbury's Superstore Coldham's Lane (24% 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%)

1.335 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%).

1.336 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

1.337 Our methodology estimates the trade draw and performance of food store destinations across Cambridge City administrative area. Key ‘town centre’ food stores 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 food stores in the historic core – Sainsbury’s Sidney Street and M&S Market Hill – are underperforming, whilst the smaller food stores in the Grafton Centre – Waitrose and Tesco Express – and the Sainsbury’s Local St Andrews Street are performing well.

1.338 Based on a convenience goods turnover of £5.5m and a floorspace of 1,193 square metres net, we estimate the Sainsbury’s Superstore on Sidney Street has an average convenience goods sales density of £4,610 per square metres net. This is lower than company average sales (£12,191 per square metres 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.

1.339 M&S Simply Food has a turnover of £3.6m and sales density of £3,244 per square metres net; and like Sainsbury’s this is below the company average sales density of £10,965 per square metres 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.

1.340 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 £10.9m. Based on a floorspace of just 265 square metres net, we estimate that the Waitrose store has an average convenience goods sales density of over £41,132 per square metres net – substantially higher than company average sales of £13,431 per square metres net.

District and Local Centres – Floorspace Performance

1.341 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 6, Appendix 1).

1.342 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 £30.1m and based on a convenience goods floorspace of 1,030 square metres net we estimate that the store has an average convenience goods sales density of £29,223 per square metres net. This is substantially higher than company average sales (£9,930 square metres net) and reflects the popularity of deep discount retailers in the marketplace.

1.343 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 £9.1m. Based on a convenience goods floorspace of 1,600square metres net, we estimate that the store has an average convenience goods sales density of £5,688 per square metres net, compared to company average levels of £12,191 per square metres net.

1.344 Two further exceptions are the relatively new local food stores at CB1 – M&S Simply Food and Sainsbury's Local. The data suggests that both stores have low turnovers and floorspace performances of £1,736 and £2,024 per square metres net respectively. This compares poorly with company average sales densities of £10,965 per square metres net (M&S) and £12,191 per square metres net (Sainsbury's). Both stores are, however, located close to Cambridge mainline railway station, and 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 food stores are likely to perform well in this location, consistent with qualitative observations during site-visits.

Out-of-Centre Food Stores – Floorspace Performance

1.345 Sainsbury's superstore, Coldham's 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 food store in the city area and has a convenience goods turnover of around £44.9m – 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 square metres, we estimate the sales density to be around £17,967 per square metres net, higher than Sainsbury's company average of £12,191 per square metres net. This is an improved performance since 2013.

1.346 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 £44.6m, 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 square metres, we estimate the sales density to be c.£16,654 per square metres net, higher than company average levels of £13,431 per square metres net. The floorspace performance of this store has improved since the 2013 study, when it achieved a sales density of £14,080 per square metres net.

1.347 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 £31.5m, higher than the level recorded in the 2013 study (£23.3m). Based on this turnover, and a net convenience goods floorspace of 2,274 square metres, we estimate the sales density to be c.£13,852 per square metres net – lower than company average (£17,285 per square metres net) but higher than concluded in the 2013 study (£8,658 per square metres net).

1.348 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 £5.8m – higher than that identified in 2013 (£4m). Based on this turnover and a net convenience goods floorspace of 973 square metres, we estimate the sales density to be c.£5,965 per square metres net – higher than that calculated in 2013 (£4,087 per square metres net), but lower than company average expectations (£12,911 per square metres net).

1.349 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.

1.350 Tesco Cheddars Lane is located in Zone 4 of the survey area, to the northeast of the city centre. It is the second largest food store and we estimate it currently has a turnover of around £30.3m – only marginally higher than identified in the 2013 study (£28.6m). Based on this turnover and a net convenience goods floorspace of 2,449 square metres, we estimate the sales density to be c.£12,372 per square metres net – higher than that calculated in 2013 (£10,766 per square metres net) and marginally above company average expectations (£12,911 per square metres net).

Convenience Goods Assessment – South Cambridgeshire District Council

Turnover/Shopping Patterns

1.351 Convenience goods floorspace in South Cambridgeshire District is located across the network of 'Village Settlements', and in policy terms they are all 'town centre' food stores. 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.

1.352 Table 9.2 below lists the most popular food stores 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 food stores across South Cambridgeshire combined (listed in Table 6, Appendix 1), have a market share of 31.2% (£212.4m).

Table 9.2: Most Popular Food Stores in South Cambridgeshire by Turnover

Number	Store	Turnover (£m)	Sequential Location
1	Tesco Superstore, Milton	£43.0m	Village Settlement
2	Tesco Superstore, Fulbourn	£37.3m	Village Settlement
3	Morrisons, Cambourne	£30.7m	Village Settlement
4	Tesco Extra, Bar Hill	£40.8m	Village Settlement

1.353 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 food store 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%).

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

Village Settlements – Floorspace Performance

1.355 Tesco Superstore, Milton is located in Zone 4, within close proximity to Zone 3 and Zone 9, and to the northeast of the city centre. We estimate that the store has a convenience goods turnover of £43.0m. Based on a convenience goods floorspace of 2,244 square metres net, we estimate that the Tesco store has an average convenience goods sales density of £19,162 per square metres net. This is higher than the Tesco company average levels (£12,911 per square metres net), and broadly in line with that last recorded in the Council's 2008 evidence base (£20,385 per square metres net).

1.356 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 £37.3m. Based on this turnover, and with a net convenience goods sales area of 2,458 square metres, we estimate the floorspace performance sales density to be around £15,175 per square metres net. This is marginally higher than Tesco company average levels (£12,911 per square metres net), and higher than last recorded in the 2008 evidence base (£13,694 per square metres net.

1.357 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 £30.7m. Based on a convenience goods floorspace of 2,693 square metres net, we estimate that the Morrisons store has an average convenience goods sales density of £11,400 per square metres net. This is broadly in line with company average expectations (£11,300 per square metres net), and higher than last recorded in the 2008 evidence base (£8,540 per square metres net).

1.358 Tesco Extra, Bar Hill is located within the eastern part of Zone 7, close to the boundary with Zone 8. We estimate that the store has a convenience goods turnover of £40.8m. Based on this turnover, and with a net convenience goods sales are of 4,031 square metres, we estimate the floorspace performance sales density to be around £10,122 per square metres net. This is lower than Tesco company average levels (£12,911 per square metres net), and also lower than last recorded in the 2008 evidence base (£13,240 per square metres net) when it had a turnover of around £53m.

1.359 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

1.360 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. Floorspace need is, however, relatively flat to the period 2040 with little growth given the extent of household expenditure squeeze.

1.361 Sales density growth rates[4] have been volatile in recent years given sharp swings in retail spending due to temporary closures in businesses and social distancing restricting during the pandemic, and subsequently the impact of high inflation. Consistent with the decline in expenditure on convenience goods, the short-term outlook in respect of the sales efficiency of existing floorspace has been downgraded to reflect the fall in spending on food.

1.362 Convenience goods sales densities are expected to be weak in 2023 and 2024 given the poor near-term outlook for retail sales volumes, followed by a tentative return to growth from 2025. Experian assume a decrease in sales efficiency rate for existing floorspace of -1.8% during 2023, and -0.6% in 2024; followed by growth of 0.2% between 2025 and 2030, and 0.3% between 2030 and 2040.

1.363 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 food store c.2,000 square metres net
- Northstowe District Centre, 1 x food store c.2,000 square metres net.

1.364 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 into 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 food stores, which – like Eddington – will draw trade from a wider catchment area and divert some trade from existing food stores. These two food stores are located within the largest strategic growth areas, with the largest levels of planned and committed retail floorspace.

1.365 The projections are summarised in Table 12, Appendix 1, which indicates that by 2025 there will be an identified residual expenditure of £22.7m, falling to £21.4m in 2030, £18.7m in 2035 and £16.0m in 2040. Based on an average sales density of £12,000 per square metres net (grown according to recommended sales efficiency rates set out above), need forecasts are set out in Table 9.3 below. Growth in baseline population and expenditure is not sufficient to outpace

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[4] Sales density is a measure of performance in retailing. It is the revenue generated for a given area of sales space and is presented as a monetary value per square metre. The higher the figure, the more efficiently the floorspace is being used, and the lower the value the less efficiently the floorspace is being used.

sales density growth of existing floorspace when also taking into account commitments.

Table 9.3: Convenience Goods Floorspace Need, Greater Cambridge (square metres net)

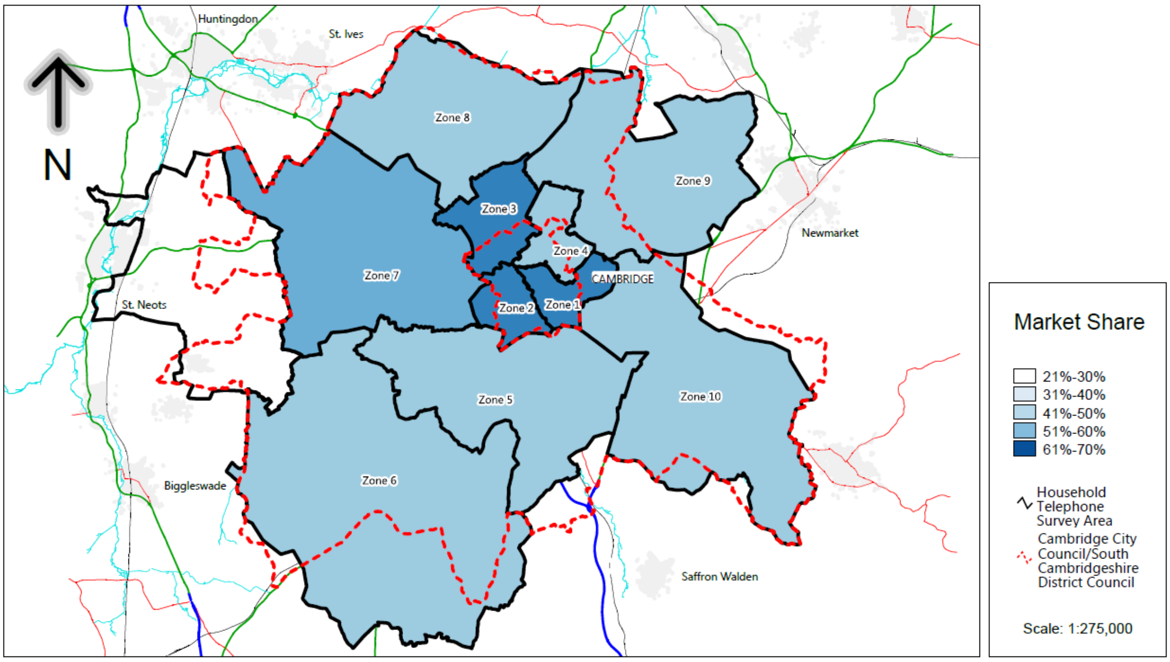
Year	Convenience Goods Floorspace Need, Greater Cambridge (square metres net)
2025	1,901
2030	1,773
2035	1,525
2040	1,287

Comparison Goods Assessment – Floorspace Performance

1.366 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.

1.367 Within the survey area, Cambridge City Centre draws 53.6% of total available comparison goods expenditure (£526.1m) and also benefits from a 32% inflow of trade from beyond Zones 1-11 (£247.6m). We estimate that the city centre has an overall comparison goods turnover of £773.7m. Based on a comparison goods floorspace of 60,856 square metres net, we estimate Cambridge City Centre to have a sales density of approximately £12,712 per square metres net. This is a strong performance for a city centre and is much improved since the 2013 Study (£7,497 per square metres net).

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



1.368 This increase in floorspace performance per square metres, is driven primarily by the reduction in comparison goods floorspace in the city centre, down from 87,677 square metres net in 2013 to 60,856 square metres net in 2023. This downward trend adjustment to retail business composition is consistent with national trends across most town and city centres in the UK.

Comparison Goods Floorspace Need

1.369 In forecasting quantitative capacity for future comparison goods floorspace beyond the baseline (2023), we have drawn on economic commentary published by Experian in February 2024. In particular, our analysis and need assessment has regard to the implications of economic uncertainty on floorspace efficiency, i.e. the rate in which existing floorspace will absorb any growth in expenditure over the plan period. The sales density has a direct impact on the levels of floorspace need arising [5].

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[5]Sales density is a measure of performance in retailing. It is the revenue generated for a given area of sales space and is presented as a monetary value per square metre. The higher the figure, the more efficiently the floorspace is being used, and the lower the value the less efficiently the floorspace is being used. Need forecasts make an

1.370 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. Those that remain trading generally strive to improve their floorspace performance.

1.371 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.

1.372 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 square metres) in recent years.

1.373 Subsequent to the publication of these trends in February 2020, the Covid-19 pandemic and now wider world events including the war in Ukraine are having far reaching consequences for our high streets and town centres. The Experian Retail Planner February 2024 revised sales efficiency forecasts in the context of greater economic uncertainty and budgetary constraints. Whilst this is expected to correct once the spending recovery becomes more established, the short to medium term forecast for sales densities has been revised lower in line with the downgrade in the outlook for retail spending.

1.374 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. Based on our earlier analysis in respect of population, expenditure growth and shopper trends, the model projects that there will be no residual expenditure to support additional comparison goods floorspace over the plan period.

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allowance for existing businesses to either improve their floorspace performance and absorb some residual expenditure, or to experience a decline in performance.

1.375 Any increase in population and expenditure is not sufficient to out-pace expenditure claims in the form of online shopping alongside existing floorspace improving their business efficiency. We recommend that the Local Plan does not plan to accommodate additional comparison good floorspace over the plan period, albeit this should be reviewed regularly over the local plan period given the level of economic and global uncertainty.

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, Coldham's 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 food stores 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 1,500 square metres net of convenience goods floorspace over the plan period. Given continued fluctuations in economic trends, the overall trajectory over this period is downwards. This should be monitored.
- 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

lower city centre comparison goods floorspace and growth in population and expenditure since 2013, the city's performance sales density has experienced a strong increase from £7,497 per square metres net in 2013 to £12,712 per square metres net in 2023.

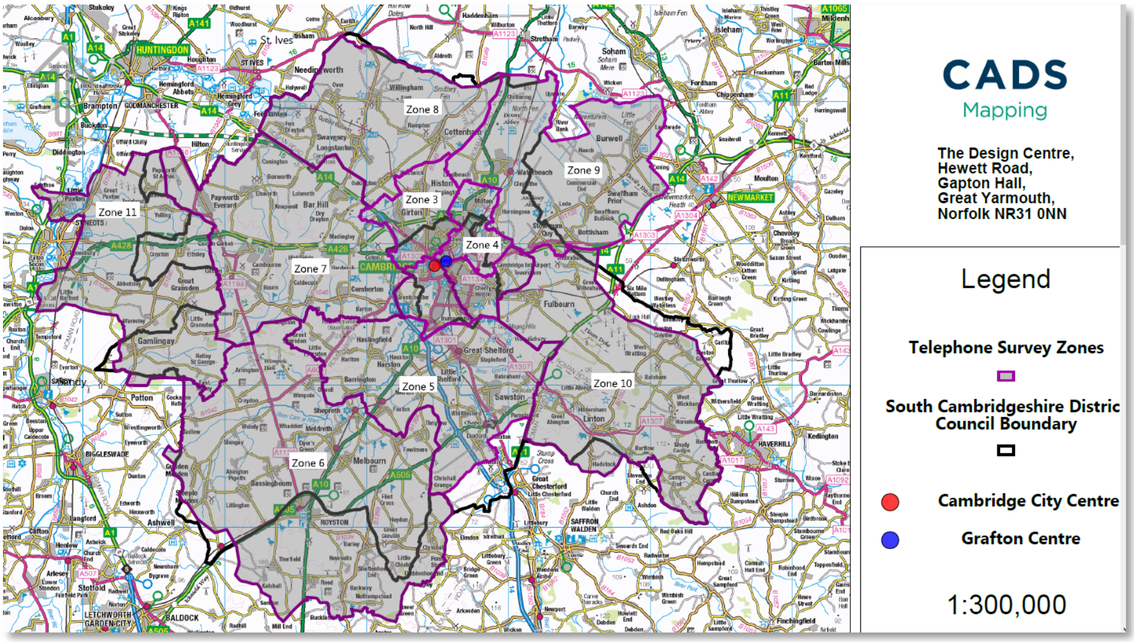
- Based on the current market share of the city centre and out-of-centre retail provision, there is no need to plan for additional comparison goods floorspace over the plan period. This should be reviewed regularly.

Leisure Assessment

1.376 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.

1.377 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



1.378 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

1.379 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

1.380 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, Cambridge Leisure Park: 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 annul 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.

1.381 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.

1.382 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.

10.1: Cinema Choices Zone 5-11

Zone 5:

- The Light Cinema, IMAX (38.0%)
- Vue, The Grafton (37%)
- Arts Picturehouse (24.4%)

Zone 6:

- Cineworld, Stevenage Leisure Park (31.2%)
- The Light Cinema, IMAX (24.9%)
- Vue Cinema, The Grafton (14.2%)
- Arts Picturehouse (7.0%)

Zone 7:

- Vue Cinema, The Grafton (37.3%)
- Cineworld, Huntingdon (24.2%)
- Arts Picturehouse (15.7%)
- The Light Cinema, IMAX (13.8%)

Zone 8:

- Vue Cinema, The Grafton (48.6%)
- Cineworld, Huntingdon (24.1%)
- Arts Picturehouse (15.3%)
- The Malting, Ship Lane, Ely (6.3%)

Zone 9:

- Vue Cinema, The Grafton (30.9%)
- The Light Cinema, IMAX (27%)
- Arts Picturehouse (19.3%)
- Cineworld, Ely (17.9%)

Zone 10:

- Cineworld, Haverhill (27.8%)
- The Light Cinema, IMAX (24.3%)
- Arts Picturehouse (16.1%)
- Vue Cinema, The Grafton (13.4%)

Zone 11:

- Cineworld, St Neots (71.2%)
- Cineworld, Huntingdon (14.9%)
- Arts Picturehouse (4.7%)

1.383 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.

1.384 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 since 1971.

1.385 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.

1.386 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.

1.387 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.

1.388 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.

1.389 In Cambridge, these trends would suggest that the three existing cinemas will remain viable. Since the household survey was completed an Everyman cinema opened in November 2024, in the Grand Arcade. The city has a good mix of cinema format, with these venues occupying important city centre/leisure-based locations which must be protected.

1.390 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. Cinemas continue to recover from Covid, three years after the first lockdown; major cinema operators are seeking debt restructuring and bankruptcy in some cases, and whilst major blockbusters have been released these are about a third of productions compared to the pre-Covid film world. High tickets prices and the cost-of-living crisis throughout 2023 and into 2024 will hamper any quick recovery.

Restaurants

1.391 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%)

1.392 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.

1.393 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.

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

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 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 7:

- Cambridge Historic Core (75.9%)
- Central London/West End (4.0%)
- St Neots (3.9%)

Zone 8:

- Cambridge Historic Core (66.8%)
- St Ives (10.6%)
- Bourn Village Centre (4.6%)

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 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 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%)

Note: Highest responses only

1.394 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.

1.395 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%

1.396 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

1.397 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.

1.398 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.

10.4: Café Choices Zone 5-11

Zone 5:

- Cambridge Historic Core (50.4%)
- Sawston Village Centre (12.8%)
- Great Shelford Village Centre (12.5%)

Zone 6:

- Cambridge Historic Core (38.0%)
- Royston (40.8%)
- Melbourn Village Centre (7.0%)

Zone 7:

- Cambridge Historic Core (46.8%)
- Cambourne Village Centre (19.4%)
- Huntingdon (6.4%)
- Papworth Everard (5.0%)

Zone 8:

- Cambridge Historic Core (37.0%)
- Willingham Village Centre (20.6%)
- St Ives (16.1%)

Zone 9:

- Cambridge Historic Core (58.9%)
- Newmarket (11.0%)
- Ely (7.3%)
- Bury St Edmunds (5.1%)

Zone 10:

- Cambridge Historic Core (47.5%)
- Saffron Walden (11.9%)
- Linton Village Centre (8.3%)
- Sawston Village Centre (5.9%)

Zone 11:

- St Neots (47.2%)
- Cambridge Historic Core (24.5%)
- Biggleswade Retail Park (8.6%)

Note: Highest responses only

Public Houses (Pubs) and Bars

1.399 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%)

1.400 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.

10.5: Pubs/Bars - Choices Zone 5-11

Zone 5:
- Cambridge Historic Core (51.1%)
- Great Shelford Village Centre (11.6%)
- Sawston Village Centre (7.9%)

- Duxford Village Centre (5.8%)

Zone 6:

- Cambridge Historic Core (28.4%)
- Royston Town Centre (40.3%)
- Melbourn Village Centre (8.6%)

Zone 7:

- Cambridge Historic Core (51.7%)
- Cambourne Village Centre (18.9%)
- Hardwick Village Centre (6.2%)

Zone 8:

- Cambridge Historic Core (43.0%)
- Swavesey Village Centre (11.5%)
- Willingham Village Centre (11.4%)
- Boxworth Village Centre (6.6%)

Zone 9:

- Cambridge Historic Core (35.4%)
- Burwell Village Centre (10.7%)
- Waterbeach Village Centre (10.7%)
- Newmarket (7.8%)

Zone 10:

- Cambridge Historic Core (42.3%)
- Linton Village Centre (18.4%)

Zone 11:

- St Neots (28.9%)
- Cambridge Historic Core (14.5%)

Note: Highest responses only

Nightclubs

1.401 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.

1.402 More recently, nightclubs have re-opened since the first Covid-19 lockdown in March 2020, but it is thought that for some, the financial impact of the lockdown would lead to closures. 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 only 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.

1.403 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.

1.404 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.

1.405 The nightclub sector has, however, been directly impacted by the Covid-19 pandemic and in some cases disputes over lease renewals. The popular nightclub 'Fez' closed in January 2021 with a new nightclub 'MASH' opening in its place. 'Ballare' nightclub permanently closed in November 2020, with 'Vinyl', Sidney Street and 'Lola Lo', Guildhall Place as the other traditional nightclub venues. Although there are just four nightclub venues in Cambridge City Centre, there are also venues that appeal to local residents and students that are open late. 'Revolution', Downing Street and 'Novi', Regent Street are multi-floor venues with event space, music and bars on each floor. Town and Gown, Market Passage is a notable new typology of venue mixing eating and drinking with a top-floor performance space capable of hosting music events along with a broader programme of theatre, comedy and live entertainment.

1.406 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

1.407 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.

1.408 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).

1.409 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.

1.410 In respect of tenpin bowling, trend analysts report that the industry is currently halfway "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.

1.411 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'.

1.412 We note that there are no 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.

1.413 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

1.414 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%).

1.415 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.

1.416 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.

1.417 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.

1.418 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 or 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.

1.419 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.

1.420 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%

Conclusions & Recommendations

1.422 Drawing on previous sections, including both the qualitative and quantitative analysis, this section sets out the key conclusions and recommendations to take forward into the new Local Plan. We consider the scope to accommodate new retail and leisure development across the Greater Cambridge area and set out opportunities for a pro-active development plan policy framework to facilitate sustained long-term strength in town centre performance.

1.423 The NPPF advises Councils to plan positively to meet needs arising for town centre uses. Policies should protect and support the vitality and viability of town centres, consider frontages and boundaries, and allocate a range of suitable sites to meet the scale and type of retail development needed.

Conclusions - Policy Framework

1.424 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 LPAs to recognise that town centres are at the heart of their communities and to pursue policies which protect their health and vitality.

1.425 The 2018 Cambridge Local Plan identified an objectively assessed need of c.14,000 square metres net of additional comparison goods floorspace to the period 2022 and supported the delivery of 12,000 square metres in Cambridge City Centre including through the redevelopment of the Fitzroy/Burleigh Street/Grafton area (FBGA). Policy 12 endorses retail growth at FBGA and references the separate Grafton Masterplan (2018).

1.426 Cambridge City Local Plan policy 2018 supports the 'town centres first' approach to retail floorspace, with policies setting out how the Council will promote vital and viable town centres across the administrative area. Policy also aims to secure, encourage and protect the diversity of uses within town centres, albeit detailed frontage policies are now out-of-date in the context of planning reform. We address this further in our recommendations below.

1.427 South Cambridgeshire is a largely rural district with over 100 villages, a growing population and new clusters of high technology research and development. Paragraph 8.73 of their 2018 Local Plan confirms that identified comparison and convenience goods floorspace need would 'generally relate to serving the planned major developments such as Northstowe'.

1.428 Aside from the Fitzroy/Burleigh St/Grafton Area (FBGA) and Station Areas West including Clifton Road in Cambridge City, most major strategic development/opportunity sites are located on the joint authority shared boundary. These include four Area Action Plans setting out the parameters for major new settlements at the Southern Fringe, North-West Cambridge (Eddington), (Draft) North-East Cambridge and Cambridge East.

1.429 Strategic Sites/Areas of Major Change on the boundary also include:

- Cambridge North railway station area
- West Cambridge, Cambridge City
- Orchard Park, South Cambridgeshire
- Huntingdon Road/Histon Road (NIAB 1 & 2), Cambridge City and South Cambridgeshire)
- Cambridge Biomedical Campus (including Addenbrooke's Hospital) (Cambridge City) including a planned Cambridge South railway station (anticipated to open summer 2025) and
- Southern Fringe/Clay Farm (now complete).

1.430 In South Cambridgeshire District Council, the Local Plan allocates major new strategic settlements at Northstowe (AAP, 2007) and Waterbeach new town (SPD 2019), a new village at Bourn Airfield (SPD 2019) and a major extension to Cambourne. It should be noted that the proposed East West rail link will include a new railway station at Cambourne, connecting to Cambridge to the east, and also west, providing direct access to Bedford, Milton Keynes and Oxford.

Planning Reform

1.431 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).

1.432 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) commenced on 1 August 2021. This applies to 'unused' buildings that have been vacant for 3 months, are no larger than 1,500 square metres, and were previously used for at least 2 years for commercial, business or service use.

National Trends

1.433 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 reinforce, however, the need to look beyond the role of retail 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 accelerated these already identified 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 places as a consequence of the same trends.

1.434 It is apparent that these 'extra layers/diversity of uses' are in addition to a 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.

Sub-Regional Context

1.435 The analysis clearly demonstrates the continued regional importance of Cambridge City Centre as a retail and leisure destination. Policy should retain and enhance this position over the new Local Plan period and beyond.

1.436 The previous 2013 Cambridge Retail and (Commercial) Leisure Study identified a fall in city centre market share in the period since 2008 despite recent major investment in the form of Grand Arcade and Christ's Lane (62.0% to 56.5%). 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.

1.437 Up-to-date evidence demonstrates that Cambridge City Centre has lost some market share since 2013 with a small downward variation (55.3%[6], compared to 56.5% in 2013). In contrast, out-of-centre retail warehousing has experienced a strong fall in market share from 23.7% to 15.7%[7]. The city

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[6] Zone 1-10 only, enabling a direct comparison with the 2013 Study.

[7] Zone 1-10 only, enabling a direct comparison with the 2013 Study.

centre has retained its appeal and catchment, whilst the popularity of out-of-centre floorspace has declined substantially.

1.438 In the absence of major competing development since 2013, this out-of-centre market share decline can be attributed almost entirely to the growth in on-line shopping (from 9.9% in 2013 to 22.8% in 2023). The city centre has withstood the impacts of national trends and the growth in on-line shopping more robustly that out-of-centre destinations across Greater Cambridge.

1.439 Inflow from outside Greater Cambridge has fallen from 36% in 2013 to 32%. This is the consequence of several factors including a greater product range across food superstores, the growth in online shopping reducing the need to travel longer distances, and a post-Covid desire to 'shop local'.

1.440 Moving forwards, and in the absence of major strategic retail development proposals across the Greater Cambridge sub-region, the greatest threats to city centre market share are a) online shopping and b) a larger and stronger out-of-centre retail offer. In the context of current commercial markets, the latter is more unlikely.

Cambridge City Centre

1.441 Cambridge City Centre – including the historic core and FBGA – continues to perform well against a number of key health check indicators. Since the previous Retail Study, it was found that the vacancy rate had fallen across both separate parts of the Primary Shopping Area, and relative to other comparator cities across the UK, Cambridge was performing very strongly, with retail rental values well above many cities, and comparable to Oxford.

1.442 Both the Historic Core and the Fitzroy / Burleigh Street (FBGA) areas have a strong comparison offer, as would be expected in a major city such as Cambridge. Nevertheless, a noticeable shift over the last five years is recorded across the city centre, reflective of wider national trends. Whilst the number of comparison good units in the historic core (43% of total) remains well above national average (30%), the level of comparison goods floorspace has fallen by almost a third from 87,677 square metres net (2013) to 60,856 square metres net (2023).

1.443 Again, tracking national trends, the number of leisure uses in the historic core has increased from 149 (26%) in 2013 to 179 (31%) in 2023, and the number of vacant units has increased marginally from 44 (8%) in 2013 to 51 (9%) in 2023, albeit remains well below the national average of 12%. A greater level of diversification is recognised and recorded within our analysis.

1.444 The FBGA (which includes the Grafton Centre) is reflecting the same trends, with the reduction of comparison goods units from 87 in 2013 to 75 in 2023 – the most notable recent loss being the Debenhams department store in the Grafton Centre, which closed in May 2021. The area has lost around 8,201 square metres gross of comparison floorspace since 2013, and that figure is likely to have increased substantially following more recent closures within the Grafton Centre since the time of the survey audit.

1.445 The number of leisure uses in the FBGA has increased from 38 (2013) to 44 (2023) but remains more limited than the historic core offer (179 units). The overall vacancy rate has fallen since 2013 from 23 to 17, but concern is raised around the viability of the Grafton Centre in the longer term with several vacant units recorded. The vacancy rate is likely to have risen more recently due to closures across the Grafton Centre. As set out in Section 8, the Grafton Centre is the subject of redevelopment proposals.

1.446 The University of Cambridge and historic centre are both recognised, helping to attract national and international tourists and students into the city and resulting in high levels of footfall. Visitor survey analysis demonstrated 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 towards multi-dimensional town and city centres.

District, Local and Village Centres

1.447 The retention and reinforcement of a sustainable network of District, Local and Village Centres across Greater Cambridge forms a key part of the core priorities of the joint planning area. In planning terms, the NPPF promotes strong neighbourhoods, inclusive and safe places, social interaction and healthy lifestyles. Both Local Plans endorse this aspiration through their defined town centre retail hierarchies.

1.448 Cambridge City currently has six district centres, eight local centres and fourteen neighbourhood centres. Since the 2013 Study, a number of new centres have become established as ‘places’; these include The Railway Station CB1, Eddington (3,000 new homes), Darwin Green (NIAB1) (1,000 new homes), and Orchard Park (900 new homes). These will likely be allocated as ‘town centres’ within the new Local Plan, addressed further below as part of our recommendations.

1.449 The 10-minute walk time analysis within Cambridge City demonstrates good coverage of residential areas which have access to a district, local or neighbourhood centre (Section 6). Illustrative gaps in the ‘walkable neighbourhoods’ are largely subject to planned development through strategic areas of major change, including a number of new local and district centres. These will meet the needs of existing and/or new communities; and new town centres should be incorporated into the Local Plan town centre hierarchy.

1.450 Overall, across the whole network, there has been a general reduction in comparison goods operators and an increase in service and leisure businesses. Hills Road/Cherry Hinton Road Local Centre has experienced one of the most notable changes in retail and leisure provision, gaining 11 service and leisure operators and one convenience unit with the addition of Cambridge Leisure Park (built 2004). The scheme has delivered an important regional leisure facility including a new cinema, bowling alley and a range of restaurants.

1.451 As described in earlier sections of this report, Cambridge is a rapidly developing area, with aspirations for further transformative growth in the future, seeking to deliver strategic new settlements across the Greater Cambridge area. On the authority boundary with South Cambridgeshire, these include North East Cambridge, Cambridge East, North West Cambridge, and the Southern Fringe area. A number of district and local retail centres will form part of these strategic boundary growth areas and must be identified and/or allocated as necessary in the new emerging Local Plans.

1.452 South Cambridgeshire has five Rural Centres and twelve Minor Rural Centres. They predominantly offer service and leisure uses, and the overall trend since the 2013 Study has been one of a falling comparison and convenience uses and an increase in service and leisure operators. The most noticeable change has been in Sawston, which has twelve additional service and leisure operators since the last survey in 2013. Vacancy rates are generally low, except in Cambourne which has a particularly high 26% vacancy rate and is likely to require intervention over the Local Plan period.

1.453 South Cambridgeshire represents a growing and changing District, currently delivering new towns to manage growing populations, with Local Plan aspirations to deliver 19,500 new homes and 22,000 new jobs. A number of strategic site allocations for housing development (identified also in para.11.9 above) include Northstowe, Waterbeach, Cambourne West and Bourn Airfield.

1.454 Northstowe, along with Southern Fringe, North-West Cambridge, (Draft) North-East Cambridge and Cambridge East all have Area Action Plans to guide development. Waterbeach and Bourn Airfield have Supplementary Planning Documents. Of these, only Northstowe and Waterbeach will include new settlements becoming a key part of the town centre hierarchy within South Cambridgeshire. The remaining will include a mix of District, Local and Rural Village centres.

1.455 It is important that newly developed district and local centres are of an appropriate scale to meet local needs, rather than delivering new ‘destination’ town centres that might compete with the wider network of town centres. All site allocations for new centres should be accompanied by a policy requirement to test the appropriateness of new retail and leisure floorspace and mix of uses within the remit of a robust retail and leisure impact assessment.

1.456 Any floorspace above the retail need forecasts will change the current status quo of the town centre hierarchy, and this should be robustly tested. The introduction of leisure floorspace in these locations should also be subject to rigorous impact testing, afforded the same weight as proposed retail. Whilst these settlements may promote new district/local/village centres as a key part of place-making, local plan policy must require robust impact testing to ensure they are of an appropriate scale.

1.457 Floorspace need and commercial demand will be driven by the scale of housing and generated population and expenditure within the localised catchment area. This should be carefully considered within site specific retail and leisure assessments/impact assessments, considering the geographic context, scale of population, expenditure generated, physical layout, built form, target markets, accessibility, and nearby facilities.

1.458 Planning applications should include a retail and leisure impact assessment to consider these issues. Within strategic growth areas/new settlements, Local Plan policy must request this submission material without exception.

Settlement Hierarchy

1.459 As part of the emerging Joint Local Plan for Greater Cambridge, a settlement hierarchy review was completed and published as part of the Councils’ consultation under Regulation 18 of the Town and Country Planning (Local Planning) (England) Regulations 2012.

1.460 Outside Cambridge, the South Cambridgeshire Local Plan 2018 categorises its new settlements as towns and then groups the villages into four categories of Rural Centres, Minor Rural Centres, Group Villages, and Infill Villages.

1.461 After Cambridge – the main urban centre – there are ‘towns’ (Cambourne, Northstowe and Waterbeach new town) followed by Rural Centres (Great Shelford and Stapleford, Histon and Impington, Sawston and Bourn Airfield New Village). The remaining villages fall within Minor Rural Centres, Group Villages, and Infill Villages.

1.462 It is important to note there are no NPPF 'town centre' designations in South Cambridgeshire, at present. However, the larger settlements will likely be allocated as 'town centres' within the new Local Plan, addressed further below as part of our recommendations.

Strategic Sites and Population Growth

Strategic Sites

1.463 Section 8 sets out details of planned, committed and completed development coming forward on development plan strategic site allocations. The analysis confirms that there is:

- c.21,600 square metres gross of planned retail and town centre floorspace across Greater Cambridge, plus a Local Centre at Bourn 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.80,000 square metres gross of committed retail and town centre floorspace, with the largest concentrations at Waterbeach and Northstowe
- c.12,000 square metres gross of completed retail and town centre floorspace, including one larger food store at Eddington, North-West Cambridge, occupied by Sainsbury's and another Sainsbury's at Hobson's Square Local Centre.

1.464 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.

1.465 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 square metres gross, which might include a larger scale food store reaching a wider than local catchment area.

Strategic Site Population Growth

1.466 The Council have provided the planned housing trajectory and population growth forecasts to include the strategic sites to the period 2045 and beyond, based upon the emerging Local Plan First Proposals (2021). We summarise these in Table 11.1 below, which demonstrates a total population growth of 140,500 to the period 2045, and an additional 87,000 beyond 2045.

1.467 Population growth beyond 2041 is accounted for by the completion of new settlements at Northstowe, Waterbeach, Bourn Airfield, NE Cambridge, NW Cambridge, Cambridge East and the extension to Cambourne. These sites will deliver population prior to 2041 and also beyond and can be viewed as long term delivery projects. NE Cambridge, NW Cambridge, Cambridge East and the extension to Cambourne will not deliver any new housing until post 2031.

Table 11.1: Strategic Site Population Growth

Greater Cambridge Growth	**Population Growth 2021-2041**	**Population Growth Post 2041**	**Population Growth Full Build Out**
Cambridge and SCDC (to 2041 and beyond)	140,500	87,000	227,500

Quantitative Need

1.468 Cambridge City Centre continues to be the most dominant comparison-goods shopping destination in Greater Cambridge and the wider sub-region, achieving an overall strong market share of 53.7%. In the context of a lower city centre comparison goods floorspace and growth in population and expenditure since 2013, the city's performance sales density has experienced a strong increase from £7,497 per square metres net in 2013 to £12,712 per square metres net in 2023.

1.469 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. Based on our earlier analysis in respect of population, expenditure growth and shopper trends, we have projected that there will be no residual expenditure to support additional floorspace over the plan period.

1.470 Any increase in population and expenditure is not sufficient to out-pace expenditure claims in the form of online shopping and existing floorspace working to improve business efficiency. We recommend that the Local Plan does not plan to accommodate additional comparison good floorspace over the plan period.

1.471 The absence of ‘need’ does not preclude quality redevelopment coming forward in town centres in order to enhance and consolidate, and also to replace unwanted vacant space, but it does mean there is no need to allocate sites on the edge of, or outside town centres to accommodate additional comparison goods floorspace.

1.472 The quantitative analysis does, however, identify some residual expenditure sufficient to support additional convenience goods floorspace across the Greater Cambridge area (Table 14.1). New medium sized food stores at Waterbeach and Northstowe have been incorporated as commitments and claims on expenditure. It should also be noted that projections beyond 2030 should be treated with caution given the passage of time and an ongoing uncertain economy.

1.473 Convenience goods need is driven by the strong performance of a number of food stores across Greater Cambridge including Tesco Express and Little Waitrose, FBGA; Sainsbury’s Coldham’s Lane; Waitrose Trumpington; Aldi Histon Road; Tesco Fulbourn; and Tesco Milton.

1.474 Elsewhere, Morrisons Cambourne and Tesco Cheddars Lane are performing adequately; but Sainsbury’s Eddington; Asda and M&S Beehive; and Tesco Extra Bar Hill, are all underperforming. Sainsbury’s Eddington is yet to become established with residential development ongoing and incomplete.

Table 14.1: Greater Cambridge Quantitative Need: Convenience Goods - Baseline

2025 Square metres net	**2030 Square metres net**	**2035 Square metres net**	**2040 Square metres net**
1,901	1,773	1,525	1,287

Source: Table 12, Appendix 1

1.475 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.

1.476 On the basis of current market share, forecast growth in population and expenditure, and current levels of performance, we have identified need to support around 1,500 square metres net of convenience goods floorspace over the plan period. Given continued challenging economic trends, the overall trajectory during this period is downwards. The need identified is sufficient to recommend the Council plan for new, additional floorspace over the plan period.

Leisure Sector

1.477 It is evident from the data that leisure uses will remain a valued and relevant part of our multi-dimensional town centres in the future. Despite 'at home' leisure experiences such as streaming services growing in popularity, the pandemic has highlighted the need and desire for people to leave their homes and socialise with friends and family across a range of leisure experiences. Leisure spend growth forecasts demonstrate the importance of leisure venues and attractions, and the continued trend to visit and use these facilities moving forwards.

1.478 Cinema trips are the most popular leisure activity for those living within the survey area. The three Cambridge cinemas are equal in popularity and there is almost no leakage from the core urban area to alternative destinations beyond and further afield. Despite the geographic spread of the dominant Cineworld brand, the three cinemas in Cambridge continue to prove attractive to much of the Cambridge sub-region, drawing visitors in from further afield.

1.479 The three existing venues provide a good choice across alternative cinema formats, from blockbuster through to arts, and with all providing a café, restaurant and bar offer. Trends and observed demand would suggest that they remain viable, a conclusion supported by the recent opening of an Everyman cinema in November 2024, in the Grand Arcade.

1.480 There would not appear to be any further need for additional cinema facilities, but inevitably this is market driven and any such proposal should be required to demonstrate commercial demand alongside the sequential and impact tests as relevant. The Council should not plan for additional cinemas or identify sites outside of town centres.

1.481 Visiting restaurants and cafes are the second and third most popular leisure activity respectively, with the historic core driving visitor numbers across Zones 1-10. The FBGA has little influence on market share in comparison, although does perform a role for a small proportion of people. The evening restaurant economy is the most popular, with the daytime restaurant economy driving marginally lower visitation rates to the historic core as people choose to stay closer to home. The historic core is the most popular destination for cafes for those living in Zones 1-10.

1.482 It will be important to retain this leisure economy, and the analysis demonstrates that this eating/drinking sector has strengthened in recent years to the benefit of the overall health and vitality and viability of the historic core. The FBGA should retain these leisure roles given the current mix of uses and existing cinema facility. Diversification should be encouraged over the plan period.

1.483 The presence and performance of cafes and restaurants throughout Greater Cambridge city and town centres should be supported and protected given their important role in contributing to longer dwell times and footfall. Town centre strategies should continue to prioritise the role and dominance of retail in high streets but acknowledge the importance of associated leisure in the form of cafes and restaurants.

1.484 Pubs and bars are the fifth most popular leisure activity, and whilst the historic core remains the most dominant destination, small towns and villages are also well used within localised catchments. The overall trend for nightclubs has been one of decline in the context of societal trends, and whilst the analysis suggests that there is unlikely to be a need to plan for new nightclub venues over the plan period, the replacement of lost facilities may be encouraged within this university city.

1.485 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.

1.486 Cambridge Leisure Park is the key family entertainment venue with a 77% market share. This facility is out-of-centre, but it should be recognised that facilities such as boutique bowling, climbing, escape rooms and laser tag can make strong contributions to a town centre economy.

1.487 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, for example, 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.

1.488 Aside from cafes and restaurants, all leisure uses fall within sui generis or Use Class F and can be controlled in policy and through development control decisions. Policy should ensure robust sequential and impact assessment for all such leisure uses.

Recommendations

1.489 In this section, we set out a series of strategic objectives and detailed policy recommendations which the Council may wish to consider and take forward in the development of policies for its new Local Plan and other future development plan documents. These are structured around the following key themes:

- Retail Floorspace Need and Accommodating growth
- Greater Cambridge planning policy recommendations
- Hierarchy of centres
- Town centre boundaries and frontages
- Permitted development and the use of Article 4 Directions

Retail Floorspace Need and Accommodating Growth

Comparison Goods

1.490 There is no need for additional comparison floorspace across Greater Cambridge over the plan period. Irrespective of population growth, market trends combined with average town centre floorspace data generated by Experian Goad, highlight the decline of comparison goods floorspace within the city, district, local and village centres, and the wider UK in recent years.

1.491 Within this market context, proposals for comparison goods led schemes within Greater Cambridge are unlikely over the plan period and there is no need to allocate sites outside of town centres for comparison floorspace. New settlements/strategic growth areas should be considered as separate and individual destinations in the sequential test, and we clarify this further below.

1.492 Cambridge City Centre has experienced a strong positive growth in sales density since the previous 2013 Retail Study, and the city can continue to absorb any expenditure growth and footfall generated – particularly at the levels forecast in this evidence base. Any proposals for the delivery of comparison goods retail floorspace would likely be closely linked to commercial demand and appetite for investment, and should be focused in town centre locations. There is no need to plan for accommodating any need outside of town centres.

1.493 Within the current commercial markets there is unlikely to be proposals for new out-of-centre floorspace; however, any such proposed development should comply robustly with the impact and sequential site assessment considering all existing, committed and planned town centres as detailed within the Local Plan.

1.494 The introduction of comparison goods floorspace within town centres should be supported. Should commercial demand for new town centre comparison goods floorspace be demonstrated, this should be supported subject to wider local plan policies. This might be a redevelopment of existing space within a Primary Shopping Area and lead to positive investment and an enhanced and consolidated retail and leisure offer. Town centre redevelopment proposals which include ground floor retail/leisure within the Primary Shopping Area should be encouraged subject to the wider policy framework.

GRC1: There is no need to allocate sites outside the existing, emerging and planned network of town centres for comparison floorspace over the plan period. This should be kept under review, particularly beyond the first 5-year period to 2030.

Convenience Goods

1.495 The analysis identifies need for around 1,500 square metres net of convenience goods floorspace over the forthcoming plan period. This is in addition to two food stores at Waterbeach and Northstowe which have been included in the model as 'commitments'.

1.496 Identified floorspace need should be directed to the network of existing town centres, Strategic Sites, and proposed and emerging new town/local centres in the first instance – and in accordance with the sequential approach. Policy should be clear where new floorspace is supported to comply with the requirements of the sequential site assessment; thereby planning applications and development proposals are either in accordance with the NPPF, or not.

1.497 Given the number of major strategic sites/new settlements across Greater Cambridge, we do not conclude there is a need to allocate out-of-centre sites to accommodate new food stores. Indeed, the analysis has demonstrated that Asda Beehive and Tesco Extra Bar Hill are both underperforming, reinforcing the need to deliver food stores within carefully chosen 'place-making' locations. The Sainsbury's store Eddington is currently under-performing, but growth in population and expenditure in the future will help to fully support this floorspace over the plan period.

1.498 Small to medium sized food stores should be supported in emerging and planned new town/local centres of an appropriate scale to serve the local community. The 10-minute walkable neighbourhood concept should also inform the distribution of facilities across any given area. Food store proposals across the existing network of town centres should also be supported.

GRC2: Set out preferred locations and sites to meet the convenience goods need arising focusing on the network of town centres (including local and village centres), planned new centres, and Strategic Sites in the first instance. We clarify the sequential approach further below. There is no need to allocate sites outside the existing, emerging and planned network of town centres for convenience goods floorspace over the plan period. Given the extent of Strategic Sites and associated delivery phasing – in some cases beyond 2040 – this position is unlikely to change over the plan period, but the Council may wish to keep this under review, particularly given current economic uncertainty.

Greater Cambridge Planning Policy Recommendations

1.499 We first review the existing approaches to protect and enhance the vitality and viability of town centres in the two separate Local Plans. We then set out further policy recommendations to take forwards into the new Joint Local Plan.

1.500 Policy 6 of the Cambridge City Local Plan (2018) seeks to identify sites to meet the objectively assessed need from previous evidence-based studies. The policy highlights the FBGA and Historic Core as the key destinations to deliver additional and/or redeveloped retail floorspace. Our analysis does not recommend the planned delivery of additional comparison goods floorspace, but any such proposals should accord with the sequential approach. Policy 6 currently sets out the Town Centre Hierarchy including City, District, Local and Neighbourhood Centres, and this clarification should be retained in the new Local Plan. The Council may wish to include retail parks within the hierarchy of retail destinations to assist in future investment.

1.501 South Cambridgeshire's Local Plan Policy E/22 sets a threshold for when a retail proposal needs to be accompanied by a Retail Impact Assessment: a. Rural Centre village centres 500m2 (gross); b. Outside such centres 250m2 (gross).

GRC3: The Local Plan should continue to endorse the sequential approach and preparation of sequential site assessments. Policy should clearly set out the town centre hierarchy which any such assessment should be based upon. The proposed hierarchy is set out later in this section.

1.502 Policy 6 also sets out a retail impact threshold of 2,500 square metres gross. This is a substantial scale, particularly given the extent of local centre scale proposals being brought forward across the Strategic Sites. Many medium sized food stores such as Lidl and Aldi for example fall under this threshold. We recommend a substantially reduced impact threshold to ensure the Council retains control over the analysis of retail impact assessments and the appropriateness of proposed new retail and leisure floorspace.

GRC4: The new Joint Local Plan should set a local impact threshold of 300 square metres gross.

1.503 We make a number of additional recommendations in respect of specific development management policies of relevance to retail and town centres across Greater Cambridge. We set these out below.

GRC5: Land uses within the relevant locational policies of the Local Plan should be broadened to apply to the 'Location of New Town Centre Uses', to ensure all planning applications comply with the key policy tests, notably the sequential site and impact tests. New retail and leisure development should continue to be encouraged across the network of town centres as a key driver of footfall. New retail, leisure and mixed-use town centre development can be controlled through conditions to ensure ground floor occupancy is restricted to specific land uses within the retail and leisure categories. The NPPF Glossary defines the full list of 'Main Town Centre Uses' as follows:

Main town centre uses: Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

GRC6: Policy and town centre strategies should aim to retain the core retail functions of the larger City and District Centres. In the context of the new Use Class E, the Council should continue to monitor and review regularly the land use composition throughout each town centre.

To ensure an in-depth understanding of role and composition, the updates should go beyond Use Class E and monitor and record by land use category including comparison goods, convenience goods, retail service, leisure service, financial and professional uses and vacant units. Drawing on Experian Goad definitions, the audits should provide a further finer-grained break-down within each land use category at points in time, including for example cafes, restaurants, fast food restaurant and public houses within the leisure services category.

This should include maintaining and regularly reviewing shopping frontages and primary shopping areas and other key town centre uses, venues or facilities in each town centre which contribute to footfall and overall character/identity. This approach will identify the extent and effectiveness of each Greater Cambridge town centre evolving and diversifying in response to wider town centre trends.

GRC7: The Councils should seek to diversify the role of its town centres. The Council should look to accommodate an increasing range of uses within the network of town centres, including community space and facilities and housing, to help improve the sustainability of town centres in the long term. Policy should ensure that the introduction of such uses at the expense of ground floor retail/leisure frontage within the defined Primary Shopping Areas is considered carefully within a retail impact assessment. Any applications should be considered on a case-by-case basis, underpinned by a robust retail impact assessment.

The consistency and consolidation of ground floor retail frontages should be retained and protected through policy. Sites could instead include upper floors or well-connected edge-of-centre, for example. There may be exceptional beneficial circumstances of locating other uses within the primary shopping area retail frontage, if that use brings particular linked trip, footfall and vibrancy benefits to the town centre. Any loss of retail floorspace within the PSA should be robustly tested within a retail impact assessment, to consider the overall loss to the health of the town centre, and the extent to which the new use mitigates against this loss.

GRC8: The Councils should provide policy guidance on the upper floors of retail and town centre shop units, encouraging other uses in vacant and under-used spaces which complement existing neighbouring uses/businesses. An Article 4 Direction (discussed later in this section) should encompass upper floors thereby enabling the Council to manage conversion to other uses where appropriate whilst ensuring the protection of upper floors for storage areas associated with the viability of ground floor and neighbouring retail/leisure/evening economy businesses. Any subsequent planning application for change of use of an upper floor should be accompanied by a commercial usage strategy addressing this point, to ensure retail space remains viable with sufficient back office/storage space. Within the framework of an Article 4 Direction, planning applications for change of use from Use Class E commercial to residential should be accompanied with details of storage space and associated viability of the retail unit at ground floor level.

GRC9: The Council should support the delivery of redeveloped or refurbished sub-standard or low-density space to deliver the diversification of town centre uses, alongside support for the retention of ground floor shop frontages. The Council should work with developers/landlords to bring forward sites and spaces that could be used to intensify the economic function of town centres. This includes a wide range of space that can be used to support the future economic evolution of the Greater Cambridge town centres, including retail and leisure; community, religious, health and higher education; and more general employment space and workspace (including SME workspaces, artists spaces and maker spaces). Town centre strategies should encourage diversification alongside support for ground floor shop frontages to underpin and future proof the vitality and viability of town centres; any loss of retail floorspace should be assessed robustly through a retail impact assessment.

GRC10: The identification of sites to meet the retail and commercial leisure floorspace 'need' should be subject to the sequential test. We recommend the following sequential hierarchy across Greater Cambridge:

- Cambridge City Centre
- District and Town Centres
- Local and Rural Centres
- Neighbourhood and Minor Rural Centres
- Planned new settlement or urban extension centres
- Existing out-of-centre retail and leisure parks
- Edge-of-centre sites, as defined in NPPF
- Out-of-centre sites, as defined in NPPF

The Joint Local Plan may wish to consider bringing a level of consistency to the town centre hierarchy in respect of the 'town centre' definitions, thus streamlining to avoid confusion. We suggest the following:

- Cambridge City Centre
- District (City) & Town Centres (SCDC)
- Local (City) & Rural Centres (SCDC)
- Neighbourhood Centres (City) & Small shopping parades in Minor Rural Centres (SCDC)

In accordance with the approach set out in the NPPF (paragraphs 91-92), new floorspace should be directed towards the network of town centres in the first instance, alongside emerging and planned new town centres. The new Local Plan should include the list of emerging and planned new town centres within the hierarchy of town centres, either listed as 'emerging/confirmed' or 'planned'. This will assist in the enforcement of the sequential approach.

Based on the evidence presented, there is no requirement to allocate sites outside of the network of town centres for comparison or leisure floorspace.

The level of convenience goods need identified is not substantial in scale, and rather than identifying sites, we recommend the Council apply the sequential and impact assessment policy robustly when considering proposals for new food store development that falls outside of an existing town centre. The need for a sequential site and impact assessment should also apply to proposals in new settlements that aren't yet allocated as a defined town centre.

GRC11: The Council could explore options for the intensification of out-of-centre retail sites for non-retail uses, including existing retail parks and large format supermarkets. The emerging joint Local Plan may wish to recognise the potential of these locations to deliver mixed-use intensification through redevelopment, subject to other considerations and wider development plan policy.

The importance of existing retail floorspace in these locations remain an important part of the regional shopping role of Cambridge, and its contribution to meeting shopping needs should be considered as part of any redevelopment proposal. This type of intensification is most relevant to the Beehive Centre and Cambridge Retail Park. Whist there is a deficit of expenditure to support additional comparison goods floorspace, any evolution of these destinations should support the retention and ongoing role of retail in these locations, to retain trade and to meet shopping needs.

The analysis has demonstrated that there is no need for further retail parks of this nature, and market share has actually fallen in recent years, for example, the proportion of people choosing to shop in out-of-centre retail parks in Greater Cambridge has fallen. Out-of-centre and bulky goods retailing remains an important shopping function. Such locations are limited across Greater Cambridge, with the Beehive Centre and Cambridge Retail Park the key destinations to undertake this type of shopping. As part of any wider redevelopment proposals, opportunities to reconfigure, redevelop, reposition etc should be considered as part of a wider development. Commercial operator demand across the retail parks and out-of-centre retailing should inform planning applications.

The out-of-centre food superstores including Tesco Extra Bar Hill and Asda Beehive, are substantial in scale and under-performing relative to floorspace. Their consolidation and down-sizing should be supported, possibly alongside mixed-use redevelopment. It should be recognised, however, that these food stores continue to perform important destinations with some of the highest turnover levels in the region; the figures demonstrate that the floorplates are just too large. Any such proposal should be subject to wider development plan policy and other material considerations, including the importance of meeting the needs of their existing catchment area.

GRC12: Policy should aim to control proposals for new/redeveloped Use Class E floorspace in out-of-centre locations where possible, clearly setting out the type of floorspace by stated land use, scale and location, to ensure new development accords with what has been tested through the planning application process. The Council should use conditions when issuing planning permissions to control the land use type at a finer level of detail than generic ‘Use Class E’.

GRC13: Policy should endorse the sequential and impact test. Planning applications for the development of retail, commercial leisure and other ‘main town centre uses’ (as defined by the NPPF) which are not within a defined centre – including planned/undesignated centres – will need to demonstrate compliance with the sequential and impact ‘tests’ set out at paragraphs 91-95 of the NPPF (2024). The impact test threshold should be fixed at 300 square metres gross.

During the preparation of a sequential site assessment, local authorities should be proactive in presenting sites to developers as potential town centre development opportunities, which could include vacant sites/units. These will include the Strategic Sites as set out in the new Joint Local Plan. The Council should work closely and pro-actively with applicants to identify sequentially preferable sites which should be considered through the sequential test. 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 90, it should be refused.

GRC14: The Local Plan should confirm and enforce a retail impact threshold, ensuring that edge and out-of-centre retail development proposals are required to undertake a full and detailed retail impact assessment for schemes at or above 300 square metres gross. This level will define any proposal that is ‘more than just local’ in nature/scale; a small convenience/newsagent is generally no larger than 300 square metres gross and would sit comfortably within a localised and sustainable community without having a detrimental impact on the hierarchy of town centres. Anything larger becomes more strategic in nature, having a stronger consumer trade draw, and therefore a potential impact on existing floorspace. Anything over 300 square metres gross should be carefully considered through an impact assessment to ensure the Local Plan strategy to define and protect the network of town and local centres is reinforced and protected.

GRC15: Policy allocations and conditions attached to Local Centre 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.

GRC16: The importance of affordable retail and shopping has become more relevant in today's economic market, particularly following Covid-19. The Local Plan should incorporate a policy supporting – where deemed relevant – the inclusion of affordable retail space within new developments, including a floorspace threshold and percentage level, for example. This policy requirement should be considered as part of a planning application, and controlled through the most appropriate mechanism, including, for example, a Section 106 and freehold ownerships/leaseholders.

GRC17: Policy should support flexibility and the temporary or 'meanwhile' uses of vacant properties. The term 'meanwhile use' refers to the short-term use of temporarily empty buildings, including shops until they can be brought back into commercial use. Such innovative action provides an opportunity to help keep a town centre vibrant, whilst the landlord is able to continue to look for a new commercial occupant for the space during the meanwhile use. Meanwhile uses are generally for the benefit of the local community, for example; meeting spaces, informal training and learning spaces, temporary rehearsal spaces, pop-up shops and exhibitions, and so on. They can offer a breeding ground for innovative ideas and empower the local community, lasting just a few days or several years. Policy could encourage this mechanism across the Greater Cambridge area.

GRC18: The NPPF encourages local authorities to retain and enhance existing markets; and the new Joint Local Plan should reinforce this through a robust policy. The health checks and town centre analysis demonstrate the continued importance of markets to the overall vitality and viability of town centres, particularly in Cambridge City Centre. Markets should be supported and protected within the Local Plan.

GRC19: The quantitative retail and commercial leisure needs identified in this study should be subject to regular review throughout the Council's Local Plan period. We advise that quantitative forecasts beyond 2030 are considered indicative because key inputs into the quantitative need assessment such as population, rates of online shopping and expenditure growth will invariably change. Expenditure forecasts are particularly susceptible to change as the implications of Brexit, the Covid-19 pandemic and wider world events are realised over time. Alongside this, patterns of shopping will continue to evolve, both as technologies change and residents respond to new development and changes to the retail/leisure landscape.

GRC20: The Council may wish to consider a Night-Time Economy Strategy focused on Cambridge City Centre. Cambridge has always had an active night-time economy, particularly given the strong student and visitor population. It forms an important part of the economy. However, it is recognised that 24-hour activities are not suitable for every part of the city, and the needs of local residents should be balanced with the economic benefits of promoting a night-time economy.

The nature of many nighttime economy uses (e.g. late-night bars, clubs, and associated uses such as takeaways and late night fast-food outlets) means that it is particularly important for a joined-up approach to the development of a strategy, including planning, licencing, culture, regeneration, cleansing services and community safety. It is advised to work closely with stakeholders such as the police, local businesses, patrons, workers and residents.

Applications for new Nighttime Economy Uses (6pm-6am operational) should comply with the sequential test and be directed to Cambridge City Centre in the first instance. Applications for development elsewhere in Greater Cambridge should be considered on individual merits, with particular consideration to amenity and safety.

Hierarchy of Town Centres

1.504 Based on our assessment, we do not consider there to be a policy case for a substantial change to the hierarchy of town centres at the present time. On balance they are all performing a role and function in line with Development Plan definitions and aspirations. There is also no evidence to suggest that any of the centres should be de-designated from the hierarchy of centres.

1.505 To inform this appraisal, the in-depth health check analysis and quantitative assessment has considered the policy role, scale, number of operators, retailer representation and status of multiple retailers, evening economy and cultural attractions, turnover and sales density, and sub-regional / national / and international role.

1.506 The two exceptions are Hills Road and Hills Road/Cherry Hinton Road which are of sufficient scale to move from a Local Centre to a District Centre. The Council may wish to consider this evolution. Hills Road/Cherry Hinton Road has, in particular, benefitted from substantial new floorspace in and around the Cambridge Leisure Park.

GRC21: Retain the existing hierarchy of town centres, with potential re-classification of Hills Road and Hills Road/Cherry Hinton Road upwards to District Centres.

1.507 A number of new local centres will emerge within the new Strategic Sites and should be considered for inclusion into the new Town Centre Hierarchy or identified as having the potential once development is complete. The evidence and analysis presented in earlier sections highlight potential new centres at Cambridge Bio-Medical Campus, Northeast Cambridge (Hartree), Marleigh (Cambridge East), Springstead Village (Cambridge East), West Cambridge, Darwin Green, Orchard Park, Northstowe, Waterbeach and Bourn Airfield; all should be considered for allocation in the new Local Plan. We recommend that a long-term for vision Cambourne is explored, consolidating the current sporadic provision, re-providing the existing Morrisons store, and with due consideration to the location of the new train station.

1.508 Policy should ensure they are considered as part of the retail hierarchy within the sequential site and impact assessment, as discussed earlier in this section. Any planning application relating to any Strategic Site should test each town centre land use thoroughly, and a planning permission should control the accepted scale of different uses robustly.

GRC22: Support the evolution of new settlements into the Greater Cambridge town centre hierarchy. Ensure the new Local Plan clarifies and details those planned and emerging Local Centres for inclusions once complete and boundaries are defined. These centres should form part of the baseline for sequential site and impact assessments for proposed new development as set out earlier.

Local Centres

GRC23: The network of new Local Centres will deliver local retail, leisure and service needs within newly emerging neighbourhoods. Within these new local centres, policy should encourage smaller unit sizes appropriate to local centres, between 80 and 150 square metres 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.

Planning applications for new Local Centres should be accompanied by a Retail Impact Assessment to ensure their scale is appropriate to the development and the geographic locality and wider network of town centres. Local Plan policy should robustly endorse this position irrespective of any planned inclusion in the town centre hierarchy.

GRC24: Policy should restrict land uses within new Local Centres through the use of tightly worded policies, allocations and eventually conditions (at a greater level of detail than 'Use Class E' – see lists below) attached to planning permissions. Planning conditions should be led by land uses tested within the submitted Retail Impact Assessment. This policy and development management approach will assist the Council in managing the health of the new centres moving forwards, ensuring a truly sustainable community with access to an appropriate mix of retail and leisure services. Policy allocations specific to local centres could allow all or a selection of the following Use Class E, Use Class F 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 cafes 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.
- New Use Class F includes education, display of works of art, museums, public libraries, public halls or exhibition halls, public worship, law courts, halls and meeting places, outdoor sport and recreation, and indoor and outdoor swimming pools. Some of these will not be relevant to or located with a Local Centre, but policy should give consideration to the inclusion of wider social and community facilities underpinning social inclusion and accessibility and addressing social isolation.

GRC25: Policy should restrict sui generis uses from forming part of a new Local Centre, unless discussed and tested through the planning application process. Any town centre uses not falling within Use Class E or Use Class F, should be restricted/prevented through conditions attached to a planning permission. These restricted town centre sui generis uses should include amusement arcades, taxi businesses, retail warehouse clubs, nightclubs, casinos, betting offices/shops, pay day loan shops, public houses/wine bars/drinking establishments, hot food take-aways, venues for live music performances, cinemas, concert halls, bingo halls and dance halls. Proposals including these uses should be fully tested as part of the planning application process.

GRC26: Controlling Local Centres within New development: ensure the scale of new Local Centres is appropriate to the communities they are intended to serve. The scale of retail and leisure floorspace within new Local Centres should be appropriate to the scale of residential and commercial development on-site, meeting needs arising rather than creating 'destination' retailing.

Planning applications for new Local Centres should be accompanied by a Retail and Leisure Impact Assessment – irrespective of any local plan allocation – to ensure their scale is appropriate to the development and the geographic locality, and to ensure the new floorspace does not have a detrimental impact on the wider network of existing/planned centres. Proposals must demonstrate that the retail and leisure floorspace is necessary to support the wider development and is ancillary to the wider mix of uses and not rely on inflow or the diversion of trade from elsewhere – including nearby town centres. Expenditure to support new local centres should be generated locally, within the catchment community through place-making.

Town Centre Boundaries and Frontages

1.509 The NPPF directs local planning authorities to 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.

1.510 The Planning Practice Guidance (PPG) emphasises that whilst the NPPF has removed reference to primary and secondary shopping 'frontages', 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, combined, form the Primary Shopping Areas.

1.511 We draw attention to the following definitions set out at Annex 2 of the NPPF (2021), which now excludes reference to primary and secondary shopping frontages:

Town centre – Area defined on the local authority's policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance.

Primary Shopping Area – 'Defined area where retail development is concentrated'. (The Primary Shopping Area is the relevant boundary when considering the retail sequential site and impact assessment. Edge and out-of-centre is measured from the boundary of the Primary Shopping Area).

Edge of centre: For retail purposes, a location that is well connected to, and up to 300 metres from, the primary shopping area. [For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances.]

1.512 Previous versions of the NPPF provided definitions of primary and secondary shopping frontages – 'Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.' As noted above, the PPG confirms that local authorities may continue to use these frontage allocations if it is justified in supporting the vitality and viability of particular centres. Previous versions of the NPPF confirm that Primary and Secondary Shopping Frontages (combined) form a Primary Shopping Area.

GRC27: Policy should protect shop uses at ground floor level and ancillary basement/above-ground floor levels spaces used for retail back-office/ storage areas. This policy position should be enforced in the new Local Plan, ensuring new and redeveloped space includes basement/ ground & upper floor retail / leisure floorspace within the defined primary and secondary shopping frontage. New planning permissions should be conditioned accordingly by land use category/description, not general Use Class.

GRC28: Retain clear illustrations and definitions of Primary Shopping Frontage, Secondary Shopping Frontage and Primary Shopping Area for Cambridge City Centre. There has been no major strategic change in the form and composition of Cambridge City Centre, and we recommend the frontages and boundaries are retained moving forwards.

The Policies Map should illustrate each ‘Town Centre Boundary’ for those smaller centres below Cambridge City Centre, which do not have a primary and secondary frontage. Policy should make clear that this is the town centre boundary for the purposes of the sequential site and impact test’.

It is recommended that policy wording is consistent with the NPPF to ensure clarity when agreeing the scope of an impact and sequential site assessment for all town centre uses which have different distance thresholds for testing. Whilst it is not possible to enforce a specific land use within Use Class E, town centre strategies should make clear that retail and leisure uses are encouraged and prioritised at ground floor level within a Primary Shopping Area. Those uses should remain central to a town centre strategy and function of a Primary Shopping Area. The Council should work closely with developers and landlords to retain these land uses in ground floor frontages.

1.513 Current Local Plan (2018) Policy 11 considers the technical frontage composition criteria to apply to ensure the retention of healthy and vibrant retail shopping frontages. In particular it seeks to ensure that within the Primary Shopping Frontage, 70% of units are in A1 use. The creation of new class E means that changing a former class A1 use to any of former class A2, A3, B1, D1 or D2 uses would not constitute development and no planning application would therefore be required. As a result, this part of Policy 11 can now only be used to control changes from former class A1 uses (now class E) to non-class E uses. It is no longer possible to control the loss of former A1 shop uses within a Primary Shopping Frontage, and a percentage approach is no longer operable within current planning legislation.

GRC29: Within the Primary Shopping Frontage, Local Plan policy should prevent change of use to any non-Use Class E land use. Retail and leisure use at ground floor should continue to be supported in the Local Plan as the preferred land use within the Primary Shopping Frontage, and any loss of retail/leisure (rather than stating Use Class E) should be restricted where possible. Any change of use-to-Use Class F and town centre Sui Generis may be considered on a case-by-case basis, but a full Retail Impact Assessment must be undertaken to assess the overall detrimental impact – or otherwise – that this may have on the health and vitality and viability of the retail frontage and wider Primary Shopping Area.

Sui Generis uses that should be carefully managed and restricted within a Primary Shopping Frontage and considered on a case-by-case basis, include:

- Amusement arcades and casinos

- Nightclubs
- Betting offices/shops
- Pay day loan shops
- Public houses, wine bars or drinking establishments
- Hot food take-aways.

GRC30: Policy should prevent non-Use Class E within the Secondary Shopping Frontage but note that the introduction of former Use Class A4 (public houses, wine bars or drinking establishments) might be appropriate. Change of use to these former Use Class A4 (drinking establishments) should be considered on a case-by-case basis and on the merits of each respective planning application. This land use could form part of a wider Evening Economy Strategy - an over proliferation should be avoided and other issues considered, such as noise and safety.

Sui Generis uses that should be carefully managed and restricted across a Secondary Shopping Frontage and considered on a case-by-case basis include:

- Amusement arcades and casinos
- Nightclubs
- Betting offices/shops
- Pay day loan shops
- Public houses, wine bars or drinking establishments
- Hot food take-aways.

GRC31: Policy allocations and conditions attached to planning permissions should prevent the proliferation of fast-food take-aways (sui generis). The national average (proportion of units) is currently 6%, and policy may wish to ensure the representation of fast-food take-aways (Sui Generis) does not exceed 3-5% of a defined retail centre, 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. The new Local Plan should consider proliferation, distribution and catchment areas to avoid clustering and proliferation.

GRC32: Policy should protect, as far as is possible, shop uses above (or below) ground floor level within town centres unless it is successfully demonstrated that their loss will not adversely impact required operational storage space, leading to an unviable or unlettable shop unit. It is crucial that retail and leisure businesses can retain and secure the necessary storage areas to make their businesses viable.

1.514 Existing and new Local Centres should have clearly defined local centre boundaries. Given their small scale it is not necessary to define frontages, but policy must make clear that the local centre boundary represents the town centre for the purposes of the sequential site and impact assessment. The criteria with which to define a Local Centre is discussed in detail above under the Local Centre recommendations.

GRC33: Implement clear illustrations and definitions of Primary Shopping Areas, consistent with the NPPF, for each existing and emerging Local Centre. Planned new Local Centres should consider the PSA boundary during the planning application process and be agreed as part of any planning permission.

GRC34: Retain defined Primary and Secondary Shopping Frontages within Cambridge City Centre. We recommend these are retained to control land uses as far as is possible within the newly revised Use Classes Order.

Permitted Development and the Use of Article 4 Directions

1.515 Retail continues to remain a vitally important footfall driver in centres and continues to be one of the main reasons that people visit town centres. A retail offer which mixes representation from national multiple retailers which act as ‘anchors’ and specialist independents which provide diversity is important to attracting footfall, and we expect this to continue over the course of the new Local Plan period.

1.516 At the national level, whilst town centres are undoubtedly going through a period of transition, successful centres – such as Cambridge – continue to be supported by retail. The continued importance of retailing in underpinning the vitality and viability of the network of centres is also borne out by the findings of the household telephone survey undertaken in support of the study. In total, the Greater Cambridge network of city, district, local and village centres attract over £0.6b of comparison goods retail expenditure – excluding any gross value. These figures confirm the vital role which retail plays in supporting the local economy.

1.517 The diversification of each town centre is crucial if the network of town centres is to remain relevant and viable over the plan period. If there was, however, a significant shift away from ‘shop’ retail, the reasons for visiting the centre would fall and potentially erode footfall, dwell time, frequency of visit, and turnover, with potential implications for the wider vitality and viability of centres. Ground floor retail and shops in town centres should therefore be protected.

Permitted Development Rights

1.518 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) came into force on 1 August 2021. In town centres, retail shops can change use to residential use without the need for planning permission. This applies to 'unused' buildings that have been vacant for 3 months, are not larger than 1,500 square metres, and were previously used for at least 2 years for commercial, business or service use. This new permitted development could dilute retail frontages and erode the overall vitality and viability of a town centre.

Article 4 Directions

1.519 Councils have the power to remove national permitted development rights under what is known as an 'Article 4 Direction'. Paragraph 54 of the NPPF confirms that, when related to change from non-residential commercial use (Use Class E) to residential use (Use Class C3), the use of an Article 4 Direction should be limited to situations where it is necessary to avoid wholly unacceptable adverse impacts; including the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability.

1.520 Whilst this study has demonstrated that the network of centres is generally healthy, there is a need to protect them in the future, ensuring they remain strong centres which meet a full range of local residents' day-to-day shopping, and, in the case of the higher order town centres, a good choice and breadth of 'shopping'. In Cambridge City Centre, a number of buildings comprise 2-3 storey frontages that could easily convert to residential buildings at ground floor; and buildings in peripheral areas of the Primary Shopping Area may be vulnerable to this change of use.

1.521 The vitality and viability of centres is dependent on providing a critical mass of quality, footfall-generating retail and leisure uses, and the application of appropriate Article 4 directions will ensure that the network of centres continue to function as healthy centres over the new Plan period. This is relevant to Cambridge City Centre, but also to smaller town centres where retaining a mix of uses is equally important as residents rely on local shopping and services.

GRC35 Introduce an Article 4 Direction across Cambridge City Centre to prevent permitted change of use from Use Class E to Use Class C3 (dwelling-house), to protect the Primary Shopping Area – the 'thriving core of the high street'.

Monitoring

1.522 As advised in the NPPF, it is recommended that the Council should update its retail evidence base at frequent intervals throughout the Local Plan period to 2040, as new information on the economy, population growth, expenditure growth and 'special forms of trading' becomes available. The need to update should be reviewed every 5 years and implemented if needed at that point (NPPF, para.34).