

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

## AMENDMENTS: AUGUST 2009

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

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

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

Source: GVA Capacity Modelling, Table 19, Appendix 6.

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

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

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

1.7 The following documents have been re-issued to the Councils, as well as an amended version of the final report including plans and appendices:-

- Main Report;
- Plan 2 – Study Area and Household Telephone Survey Zones;
- Plan 3 – Comparison Expenditure Flows to Competing Centres;
- Plan 4 – Cambridge Comparison Goods Market Share;
- Plan 5 – Peterborough Comparison Goods Market Share;
- Plan 6 – Bury Comparison Goods Market Share;
- Plan 7 – Stevenage Comparison Goods Market Share;
- Plan 8 – Huntingdon Comparison Goods Market Share;
- Plan 9 – Newmarket Comparison Goods Market Share;
- Plan 10 – Ely Comparison Goods Market Share;
- Appendix 1a – Competing Centres Modelling;
- Appendix 1c – Competing Centres Key Indicators;
- Appendix 5 – Convenience Goods Modelling;
- Appendix 6 – Comparison Goods Modelling; and
- Appendix 10 – Northstowe Impact Modelling