Appendix 9 Extract from Cambridge Sub-Region Retail Study, GVA Grimley, October 2008

CAMBRIDGE CITY COUNCIL AND SOUTH CAMBRIDGESHIRE DISTRICT COUNCIL

Cambridge Sub-Region Retail Study

October 2008

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7. SOUTH CAMBRIDGESHIRE RURAL CENTRES

7.1 This section examines the five rural centres identified in the South Cambridgeshire Core Strategy DPD, namely Sawston, Histon and Impington, Great Shelford and Stapleford, Fulbourn and Cambourne, as well as the eight minor rural centres of Willingham, Waterbeach, Papworth Everard, Melbourn, Linton, Bar Hill, Cottenham and Gamlingay.

7.2 The adopted Development Control Policies in the South Cambridgeshire Local Development Framework afford a high level of protection to local services and facilities such as village pubs, shops, post offices, community meeting places and health centres.

7.3 As with the district and local centres in Cambridge, there is limited published information available for these centres and our healthchecks therefore draw on data provided by South Cambridgeshire District Council and detailed site visits carried out by GVA Grimley in March and June 2008. We have prepared a proforma covering a range of PPS6 vitality and viability indicators for each centre. These proformas are set out in Appendix 4 and we summarise the findings below.

7.4 Plan 12 shows the location of the rural and minor rural centres in South Cambridgeshire. It is clear from the plan that these centres are located in a ring around Cambridge. Several of the centres lie further away from Cambridge such as Gamlingay and Papworth Everard. It is also important to note that the proposed town centre of Northstowe will be located to the north west of Cambridge off the A14.

7.5 Table 7.1 highlights the number of units in the convenience, comparison, service and vacant categories in each centre. It is evident that Sawston is the biggest centre in terms of the total number of units in the centre; Papworth Everard is the smallest centre. Cambourne has a total of 18 units, but not all of the floorspace in Cambourne has been built. All of the centres have a good range of convenience, comparison and service uses and vacancy rates are very low, which indicates that the centres are healthy.

Table 7.1: Composition of South Cambridgeshire Rural and Minor Rural Centres

Centre	No. of Outlets (2008)								
	Convenience		Comparison		Service		Vacant		TOTAL
Sawston	8	14%	16	28%	30	53%	2	4%	**57**
Histon & Impington	6	11%	15	28%	27	50%	1	2%	**54**
Great Shelford & Stapleford	9	20%	11	24%	22	48%	1	2%	**46**
Cottenham	10	27%	4	11%	15	41%	0	0%	**37**
Willingham	4	15%	11	41%	7	26%	0	0%	**27**
Linton	4	4%	6	32%	14	4%	0	0%	**26**
Fulbourn	4	17%	8	33%	9	38%	3	13%	**24**
Melbourn	4	19%	2	10%	14	67%	0	0%	**21**
Gamlingay	5	25%	2	10%	10	50%	0	0%	**20**
Cambourne	1	6%	1	6%	11	61%	3	17%	**18**
Waterbeach	4	25%	1	6%	10	62%	0	0%	**16**
Bar Hill	2	13%	4	25%	9	6%	0	0%	**16**
Papworth Everard	1	8%	2	17%	4	33%	1	8%	**12**

NB – Total column may not add as some centres contain units which have been categorised as 'other'.

Cambourne

7.6 Cambourne lies approximately eight miles to the west of Cambridge and serves a planned housing development which is expected to grow to a population of 7,000 by 2009 and 10,000 by 2012. Cambourne is still expanding and there are outstanding retail permissions which have not yet been implemented. These include a plot for a DIY store/garden centre and six further plots which it is anticipated will be developed to provide a more substantial high street offer with larger units attracting multiple retailers.

7.7 Although at present Cambourne is one of the smaller centres in South Cambridgeshire in terms of the number of units, the units are modern and likely to be bigger and better configured than those in the other rural centres which are predominantly converted residential properties.

7.8 The principle shopping provision in Cambourne is a modern Morrison's foodstore, which anchors the centre as well as providing a petrol station and large surface car park with over 500 spaces. Immediately adjoining Morrison's are two developments already built (Caxton House and W2). They comprise a high proportion of service uses including a public house, estate agents, a building society, takeaways and a restaurant. At present this area appears to be quieter than the Morrison's store.

7.9 There are a variety of other uses in Cambourne including a school, nursery, library, doctor's surgery, veterinary surgery and the centre provides a good range of services and facilities for local residents.

Cambourne has also been developing into an employment centre and there is a modern business park within walking distance of the town centre as well as a hotel. The modern environment is clean and a variety of different types of landscaping and a piece of public art create an attractive environment.

Fulbourn

7.10 Fulbourn lies four miles from the centre of Cambridge and despite its proximity to the urban area, it retains a rural character and comprises a range of shops and services serving the local community. Fulbourn has a high proportion of independent retailers and several specialist operators including a grand piano shop, an art gallery and an antique shop. It also has a Co-Op as well as an independent butcher and greengrocers. Fulbourn is the second smallest centre in South Cambridgeshire and the unit sizes are relatively small.

7.11 Fulbourn has an attractive and clean environment and retains a traditional village character. The majority of units are located in close proximity and the buildings are two storeys in height.

Great Shelford and Stapleford

7.12 Great Shelford and Stapleford is made up of two interconnecting centres, located four miles to the south of Cambridge City on the A1303. Several shops lie on the A1303 but the heart of the village centre is located away from the main road in a quiet environment where shops and services are interspersed with residential uses. The centre also has the Shelford railway station with local train services to Cambridge.

7.13 Great Shelford and Stapleford is an attractive village centre providing a range of traditional convenience shops and services, many of which are independents. The centre has a good convenience provision including a Spar, Co-Op and McColls newsagents; there is also an independent butchers, bakers and delicatessens. There are several independent comparison shops in the centre including a cycle shop and a ladies fashion shop. The centre benefits from a range of other uses and community services including a health centre, village hall and community centre with extensive sports facilities.

Histon and Impington

7.14 Like Great Shelford and Stapleford, Histon and Impington consist of two village centres that have gradually merged into one larger centre and are located to the north of Cambridge on the B1049. As a result there are clusters of retail uses in each centre both with a convenience anchor; Histon by a modern Tesco Express store and Impington by a Co-Op. There is also a range of other retailers, the majority of which are independents offering specialist goods and services such as a gift shop, toy shop and fire place shop. There is a good range of local services in both parts of the centre including banks, opticians, estate agents, restaurants and takeaways. Other uses include a doctors surgery, dentist and a vets and there is a cluster of offices and light industrial uses in Impington.

7.15 Histon and Impington is an attractive centre which benefits from several open spaces with large mature trees. Histon has an attractive village green with a pond which adds to the rural character of the centre. The majority of buildings in the centre are well maintained and shop fascias are generally in good condition. There is one car park at the rear of Tesco Express and the library as well as limited on-street parking.

Sawston

7.16 Sawston is the largest rural centre in South Cambridgeshire with a total of 57 units. Sawston has a less traditional character than many of the other centres in South Cambridgeshire which can be attributed to the mix of building styles including several infill additions.

7.17 Sawston's convenience offer is anchored by a good sized Budgens store, which is located in a brick built building fronting the high street and with a surface car park to the rear. There is also a smaller Spar and several independent retailers. Sawston has a good service offer including several takeaways and restaurants, hairdressers, banks and building societies. There is also a relatively high number of comparison operators such as a hardware shop, electrical shop, toy shop and a bookshop.

Willingham

7.18 Willingham is situated approximately 12 miles to the north west of Cambridge on the edge of the Fens. It is a medium sized centre with a total of 27 units and Willingham has the highest percentage of comparison units out of all of the centres in South Cambridgeshire. Comparison uses include a rug shop, gift shop, sewing shop and wedding dress shop and it is likely that these uses attract visitors to the centre from outside of the local catchment area.

7.19 Willingham has a good convenience offer comprising a Co-Op and One Stop, as well as an independent bakery and delicatessen. The village also provides a range of service uses such as a hairdressers, a takeaway and two national banks. Willingham is a traditional village which has experienced several in-fill residential developments, however these are all well designed and sympathetic to the character of the village.

Cottenham

7.20 Cottenham lies six miles to the north of Cambridge on the edge of the Fens. It is the fourth largest centre with a total of 37 units and has experienced significant population growth over the last twenty years, which supports a range of shops and services, as well as local community groups.

7.21 Cottenham's convenience provision is anchored by a Co-Op store, which is complemented by a Premier convenience store, as well as an independent butcher and baker. Cottenham has a fairly wide range of amenities in the village, including a GP surgery, a dental surgery, library, primary and secondary schools, the latter of which hves a sports centre and outdoor swimming pool. Cottenham is large enough to support some of the services not found in the other centres such as an Indian restaurant, a Travis Perkins, a car dealership and a branch of the Cambridge Building Society.

7.22 Cottenham is an attractive centre with several local landmark buildings that contribute to the individuality and character of the village. There is an attractive village green and war memorial where local events are held.

Linton

7.23 Linton is located to the south east of Cambridge close to the A1307 and has a total of 26 units for retail and service uses. It has expanded rapidly since the 1960s and has a population of approximately 4,410. Linton is an attractive village which is essentially in two parts, divided by the river. The presence of the river in the centre of the village is an attractive feature although access to the river appears to be restricted to private residential properties. There is a green area in the centre of the village close to the river with the village sign, which has recently been restored.

7.24 A mix of shops and services provide everyday facilities to local residents, as well as attracting shoppers and visitors from further a field. Service uses include three public houses, a Chinese restaurant and takeaway, hairdressers, barbers and opticians. There are several comparison shops including a gift shop and art gallery. The Co-Op sells a good range of everyday provisions, and there are two newsagents and an independent baker.

7.25 The village has a mix of other uses, including a large secondary school, Community Centre, Public library, Health Centre and Social Centre and dentist. There is also a large sports complex on the edge of the village. Linton Zoo is also located nearby.

Waterbeach

7.26 Waterbeach lies six miles to the north of Cambridge city close to the A10. It is one of the smaller centres in South Cambridgeshire with a total of 16 units. Nevertheless, Waterbeach provides a good variety of local shops and services. The convenience offer is anchored by the independent Waterbeach Village stores and there is also a One Stop. Other facilities include a pharmacy, hairdressers, two takeaways and four public houses as well as an active social club.

7.27 Waterbeach benefits from two interlinking village greens in the middle of the village which provide an attractive area of green open space with mature trees and landscaping, children's play equipment and the village sign. The green is overlooked by shops and residential properties. The majority of shops fascias are well maintained and add to the character of the village.

Bar Hill

7.28 Bar Hill is a purpose built centre approximately four miles to the northwest of Cambridge on the A14 and is effectively split into two parts with a total of 16 units. Bar Hill developed in the late 1950s to alleviate the housing shortage in South Cambridgeshire. The retail offer is dominated by a Tesco Extra store and its large surface car park, which was redeveloped in the late 1990s. The store is one of the largest Tesco stores in the country and draws trade from a wide catchment area. There is a parade of local shops adjacent to the Tesco store providing local services to local residents such as

a dry cleaner and building society as well as several national chains with larger catchments such as Next.

7.29 The other part of the Bar Hill centre is poorly linked with the Tesco store and provides local services such as a library, post office and health centre. The landscaping around Bar Hill is beginning to mature and the centre provides a relatively pleasant modern retail environment. There is an attractive area of open space by the library with flower beds and seating.

Papworth Everard

7.30 Papworth Everard lies ten miles west of Cambridge and six miles south of Huntingdon. Papworth Everard has experienced significant change over the last ten to fifteen years including the creation of a by-pass around the village and a large number of new houses, the current population is estimated at 2,410.

7.31 Papworth Everard is one of only a few centres in South Cambridgeshire to have a purpose built shopping centre. Pendrill Court is a small yet attractive two storey building providing space for a range of facilities. Commercial uses are located on the ground floor with office uses above. There is one vacant unit in the village centre, the former Five Star newsagents – this unit lies opposite Pendrill Court and is a large vacant unit in the village which offers an opportunity for a new retail/service use and/or redevelopment. The main convenience retailer in the centre is Nisa, a small shop selling a limited range of everyday convenience goods. Other uses include a pharmacy, hair dressers, café and estate agents.

7.32 Pendrill Court provides an attractive focal point in the village, it is a brick built building with pleasant open space to the front which is nicely landscaped with seating. There is also a very attractive area of open space close to Pendrill Court with a range of sports facilities. There are several new housing developments, but these appear to be well designed and in-keeping with the village and there is a good provision of open space.

Gamlingay

7.33 Gamlingay is a quiet village, situated approximately fifteen miles to the south west of Cambridge and serves a population of approximately 3,560 people in the village, as well as residents from outlying rural settlements. Gamlingay has a total of 20 units and just under half of these are service uses.

7.34 There is a Spar store, which provides a good everyday convenience offer and this is supplemented by an independent bakers and butcher/greengrocer. The village also has a good range of local services including a pharmacy and a bank, which reduce the need for residents to travel to other destinations for these services.

7.35 Gamlingay is an attractive village but it is considered that there could be scope to enhance landscaping and the street furniture, for example, by providing more seating. Gamlingay Parish Church provides an attractive focal point in the village. There is a mix of building types ranging from traditional village cottages to more modern in-fill developments. All of the shops and pubs have well

maintained fascias and add to the character of the village. Landscaping is limited to private properties.

Melbourn

7.36 Melbourn is situated just two miles north of Royston and 10 miles south of Cambridge and is by-passed by the A10. It is a popular and thriving village home to over 4,500 inhabitants. Melbourn has a total of 21 units, the majority of which are convenience and service uses. The village centre at Melbourn is less than one mile from the station at Meldreth, on the Cambridge to London King's Cross main line.

7.37 The Co-Op store anchors the village's convenience offer providing a good range of everyday essential items. There are two restaurants and a ladies clothing store on the edge of the village, which are likely to attract visitors and shoppers from further a field. Other uses include a building society, estate agents, hairdressers, several public houses and a post office.

7.38 Melbourn is an attractive village with the village green and church creating a traditional focal point for village activities. There are several large attractive properties in the centre of the village which add to its character and the Co-Op building is sympathetic to its surroundings. Several thatched cottages remain which add to the traditional charm of the village. The cluster of retail uses on the outskirts of the village benefits from an attractive location by the river.

Summary

7.39 Overall, it is evident that the rural and minor rural centres in South Cambridgeshire are performing their roles as local convenience and service centres very well. All have a good convenience provision and vacancy rates are low. The majority of centres are traditional 'village' centres which have become established over a number of years, with the exception of Cambourne which is a purpose built centre that has been developed over the last decade as part of a large residential area which is still evolving; Bar Hill which is dominated by a Tesco Extra store; and Papworth Everard which has a purpose built shopping centre that has developed as a result of significant housing growth.

(£22.3m). There are several stores which are trading significantly above average such as the Aldi at Histon Road with a turnover of £10.2m, compared to the company average of £2.4m. There are very few deep discounter foodstores in the Cambridge sub region and Aldi is attracting market share from across the survey area. Other stores performing well include Tesco Express Campkin Road and Co-op Hills Road. Overall, many of the local foodstores are performing well, highlighting their role as important 'top-up' food destinations for local residents.

iii) Cambridge Out of Centre

10.23 The household telephone survey identified the use of four out of centre foodstores in Cambridge city local authority area which collectively turnover over £126m, compared to a company average of £132m. Waitrose at Trumpington is performing very strongly with a turnover of £42.2m compared to a company average £31m, this reflects Cambridge's affluent catchment, its high-end offer and the fact that this is the only Waitrose store in the Cambridge urban area. Sainsbury's at Coldham Lane is also performing strongly with a turnover of £42.2m compared to the company average of £29m.

10.24 Asda at the Beehive Centre is under performing with a turnover of £14.3m compared to the company average level of £37m, this is surprising given that this is the only Asda store within the sub region, however it could reflect Asda's location at the Beehive Centre where traffic can become congested and competition from the Tesco store located close by at Cheddars Lane. Tesco Cheddars Lane is also under trading which can perhaps be attributed to the fact that there is a wide range of other Tesco stores for customers to choose from; Cheddars Lane is on one of the main routes into the city centre and can become congested at peak times; and the store is not immediately visible from the main road.

10.25 It is likely that the Household Telephone Interview Survey has under estimated the turnover of the Asda, Beehive Centre. The quantitative assessment is not a precise science, rather using market shares from the Household Survey provides the best estimate of the turnover of the foodstores in the Cambridge sub region. We have contacted Asda to see if they can provide any further details on the performance of their store. The Tesco performance is comparative with the turnover identified in work carried out in Cambridge in 2006 for Tesco Stores Ltd.

South Cambridgeshire District Council

10.26 Table 10.2 below summarises the convenience turnover of the main foodstores in South Cambridgeshire based on the results of the household survey and benchmark turnovers based on company averages.

Table 10.2: Current Trading Performance of Convenience Floorspace for South Cambridgeshire District Council

Foodstore	2008 Turnover (£000s)	Company Average Sales (£000s)
Morrisons, Cambourne	£23,119	£30,087
Budgens, Sawston	£4,622	£2,191
Spar, Sawston	£601	£1,876
Tesco Express, Histon	£4,577	£2,695
Co-Op, Great Shelford	£2,793	£990
Co-Op, Fulbourn	£2,125	£2,063
Total Rural Centres	**£37,837**	**£39,900**
Tesco, Bar Hill	£55,135	£51,976
Tesco, Milton	£50,046	£28,934
Tesco, Yarrow Road	£34,908	£31,693
Total Out of Centre	**£140,089**	**£112,603**
TOTAL S.CAMBS	**£177,926**	**£152,504**

Source: GVA Capacity Modelling, Appendix 6.

i) South Cambridgeshire Rural Centres

10.27 In total we estimate that the rural centres in South Cambridgeshire have a turnover of approximately £37.8m. If all stores traded at company average levels, the turnover would be £39.9m. The largest foodstore in the South Cambridgeshire centres is the Morrisons store at Cambourne, which is trading below company average levels. All of the other foodstores which anchor the more traditional rural centres are performing very well with the exception of the Spar store in Sawston, which has a turnover of £0.6m compared to the company average of £1.9m. The strong performance of these stores can be attributed to their vital role as locations for everyday provisions.

10.28 It should also be noted that many of the rural centres have a range of other smaller independent convenience retailers which we have not been able to model because of the very small market shares derived from the telephone survey results. However, our qualitative observations have revealed that independent retailers appear to be performing well and contribute greatly to the village character of many of the centres.

ii) South Cambridgeshire Out of Centre

10.29 There are three out of centre foodstores in South Cambridgeshire, all of which are operated by Tesco. The results of the household telephone survey reveal that the Tesco store at Milton is performing very well with a turnover of approximately £50m compared to the company average of £29m. The other two Tesco stores, at Bar Hill and Yarrow Road are performing at average levels according to the survey results. In reality, the Bar Hill store may be performing better but this has not been identified by the survey as it focuses on main food shopping and may not have picked up less frequent but higher spend shopping trips.

Table 11.3 Scenario Testing of Comparison Goods Floorspace Capacity (sqm net)

Scenario	2008-2011 (sqm net)	2008-2016 (sqm net)	2008-2021 (sqm net)
Baseline Capacity	13,997	46,026	83,850
Forecast capacity taking into account growth of competing centres	10,194	33,023	67,919
Forecast capacity taking into account growth pipeline development	12,647	44,186	61,859
Forecast capacity taking into account growth of competing centres & pipeline development	8,844	31,183	45,928

Source: GVA Capacity Modelling, Tables 14, 15, 16 and 17 Appendix 6.

Implications of Development of Northstowe Town Centre

11.24 We have carried out an initial review of the retail matters arising from the Northstowe proposals. This letter (Appendix 9) was sent to South Cambridgeshire District Council on 11th April 2008. We understand that the consultants working on the Northstowe application (Arups, DTZ and Peter Shearman Associates) are proposing to formally respond to the District Council on the points raised in September 2008.

11.25 Our capacity work indicates there will be sufficient capacity to support the food and non-food proposals at Northstowe provided they are phased as set out in the Retail Capacity and Impact Report (December 2007). In terms of convenience goods, the Northstowe proposals will, in conjunction with other pipeline schemes, remove the surplus capacity in 2021. The phasing of the proposals set out by DTZ indicates that not all of the convenience goods floorspace will be completed until 2024/2025 by which point there will be further expenditure growth to support the proposals.

11.26 In terms of comparison goods, we have forecast a significant quantum of capacity for the Cambridge sub region. This is more than sufficient to support the Northstowe proposals in addition to other pipeline schemes. In effect Northstowe will have an important role in providing floorspace to meet some of the quantitative comparison goods capacity arising in the sub region.

11.27 We have undertaken an assessment of the potential impact of the Northstowe proposals on the key competing centres in the Cambridge sub region. The focus of this assessment is on the comparison goods floorspace proposed at Northstowe. We anticipate that the impact of the convenience goods floorspace will largely fall upon out of centre stores at Bar Hill and Milton and as such we have not investigated the convenience goods impact.

11.28 For comparison goods, we have assessed the impact of Northstowe at 2021. This is the end date for this study; at this point the Northstowe scheme will not be completed in its entirety. The impacts projected in 2021 will therefore be mitigated by growth in expenditure through to 2024/2025 when the

town centre is projected to be fully completed. We have also examined the impact of the proposed floorspace coming forward earlier at 2016. The consultant's acting for the developers have indicated that the town centre comparison goods development will happen towards the end of the Northstowe build out. However, at the moment there are no planning controls in place or under discussion to ensure that this would be the case.

11.29 In order to examine the potential impact of Northstowe we have estimated the turnover of the proposed comparison goods floorspace. We anticipate that it will have a turnover of £127m in 2016 and £140.7m by 2021. We estimate that the majority of this trade will be drawn from the survey zone in which Northstowe will be located (zone 3) and the adjacent zone (zone 4). For example, £63.3m from survey zone 3 in 2021 and £28.1m from survey zone 4. We have determined how this trade draw to Northstowe will affect the forecast turnover of competing centres.

11.30 The competing centres most likely to be affected by the Northstowe proposals are Cambridge, Peterborough, Bury St Edmunds, Ely, Newmarket, Huntingdon, St Neots and St Ives. Table 16, Appendix 10 sets out the likely impact in terms of the reduction in turnover of these centres in 2016 and 2021.

11.31 In terms of the centres covered in this Retail Study, Cambridge is the only centre likely to be affected from the point of view of comparison goods trade, by the Northstowe proposals. We forecast that without the Northstowe proposals the turnover of Cambridge from the survey area would increase from £814.4 in 2008 to £1,202m in 2016 and £1,496.5m in 2021. If the Northstowe scheme came forward in its entirety by 2016 we forecast that the turnover of the city centre could be reduced to £1,143m. When compared with £1,202m, this is a reduction of £58.6m or a 5% fall in turnover. We forecast that by 2021 the Northstowe proposals could result in a reduction of the city centre turnover to £1,438m from £1,496m; a reduction of £58.7m or 4%. Overall Cambridge has such a large turnover that the loss of trade forecast as result of the Northstowe proposals would not be a cause for concern.

11.32 Other centres that are likely to be affected by the Northstowe proposals are not the subject of this Retail Study. We have, however, examined the likely implications for the turnover of the centres we consider could be affected. This quantitative assessment needs to sit alongside a qualitative review of the centres in order to fully understand the likely implications. However, this is not the subject of this Retail Study and as such we have just examined the quantitative impact. We estimate an impact as a result of the Northstowe proposals of 1% on Peterborough, 7% on Ely, 9% on Newmarket and 1% on St Neots in 2021. These impact estimates, with a less than 10% reduction in turnover, should not be a cause for concern.

11.33 We forecast the greatest effect of the Northstowe proposals on Huntingdon and St Ives. These are the centres in closest proximity to Northstowe. In the case of Huntingdon, we forecast that if the Northstowe proposals came forward in their entirety by 2016 there would be a reduction in the turnover of the market town of 15%. The forecast turnover of Huntingdon in 2016 is £157m if there was no new development. However, if Northstowe came forward, the turnover of Huntingdon could be reduced by £23.6m to £133.4m.

11.34 If development at Northstowe came forward over a longer time period there would be more growth in the turnover of Huntingdon and the impact would be reduced. We anticipate that by 2021 the turnover of Huntingdon would be reduced by 15% if new development came forward at Northstowe. The turnover of the market town would be £164m rather than £192m. As such it is evident that Huntingdon would be better placed to withstand the impact of new development at Northstowe if proposals came forward over a longer time frame.

11.35 We anticipate the greatest impact upon St Ives as a result of the Northstowe proposals. St Ives is one of the smaller market towns and is closest to Northstowe. We estimate it has a turnover of £39m in 2008, this could grow to £52m by 2016, if there was no new development coming forward. We forecast that as a result of the Northstowe proposals the turnover could fall to £39m in 2016. This is a reduction of £12.3m or a 24% impact and the turnover or St Ives would fall below 2008 levels. St Ives would be better placed to withstand the Northstowe proposals if they come forward over the longer time frame. We forecast, for example, that by 2021 without any new development the market town would have a turnover of £62m. With new development at Northstowe this would fall to £49m. Whilst this is a reduction of £14m or 22%, overall the turnover of St Ives would have increased on 2008 levels.

11.36 These impact figures, particularly for Huntingdon and St Ives need to be considered in context. For St Ives in particular, we understand that it is pleasant, historic market town which benefits from some tourist and visitor trade. As such it may be better placed to withstand the impact of new development at Northstowe as there are likely to be opportunities to diversify its offer.

Summary

11.37 We have examined the implications of new convenience goods development in the pipeline coming forward over the LDF period. In particular, we have considered additional new convenience floorspace at Cambridge East, the Station Area and the Southern Fringe and at Northstowe in South Cambridgeshire. If all these schemes came forward it would effectively remove convenience goods capacity by 2021.

11.38 For comparison goods, we have examined a scenario to test the implications for the capacity in the Cambridge sub region of growth in competing centres. Despite a reduction in market share as a result of proposals coming forward in Peterborough and Bury St Edmunds, we do not anticipate that the capacity for further comparison goods floorspace would be significantly reduced.

11.39 We have also undertaken a scenario to examine the implications for capacity of developments in the pipeline coming forward. This includes further development at Cambourne and the new town at Northstowe in South Cambridgeshire and in Cambridge City the new district centre at East Cambridge and some comparison goods floorspace in the Station Area. Forecasts indicate a reduction in capacity as a result of these pipeline developments coming forward. Although, again this would still not be significant.

11.40 The final scenario we have examined is the combined effect of growth in competing centres and pipeline development coming forward. This would reduce the capacity in the sub region to 8,844

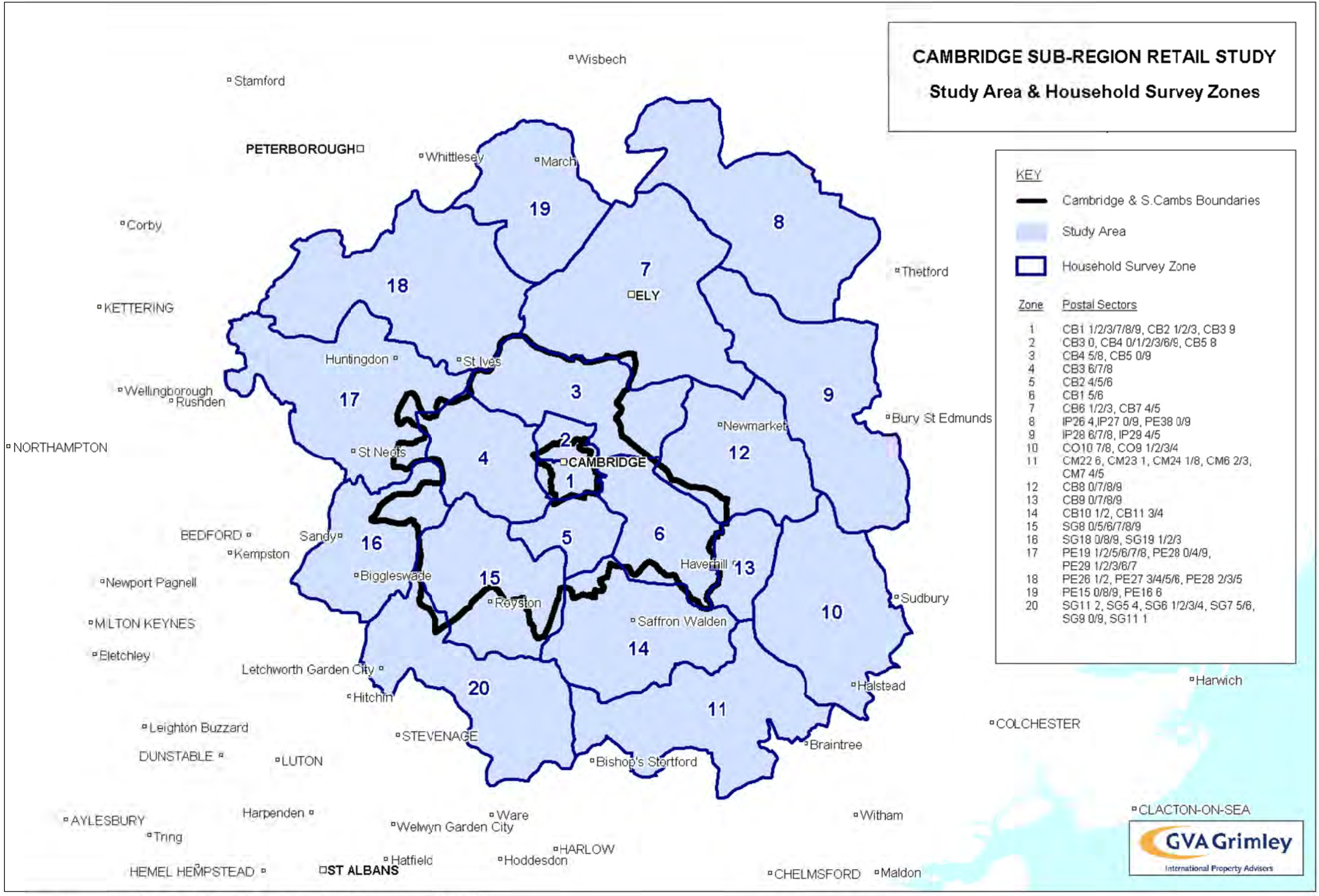
sqm net of comparison goods floorspace by 2011, 31,183 sqm net by 2016 and 45,928 sqm net by 2021.

11.41 In terms of the proposed new development at Northstowe, the scenario testing indicates that there is sufficient convenience and comparison goods capacity to support the proposed floorspace, provided it comes forward in the phases identified by DTZ in the Retail Capacity and Impact Report. The new town centre will assist in addressing residual comparison capacity arising as a result of the strong level of trading of Cambridge city centre.

11.42 Whilst a need can be demonstrated, the level of impact will be more of an issue. We have examined the potential implications of the new town centre development proposed at Northstowe. In particular, we have estimated the likely impact of the new comparison goods floorspace on surrounding centres. Cambridge City Centre is the only centre in this Retail Study likely to be affected by the proposals and we have only forecast a modest impact. We forecast that the greatest impact is likely to be on Huntingdon and St Ives and particularly if development came forward earlier than currently proposed.

CAMBRIDGE SUB-REGION RETAIL STUDY

Study Area & Household Survey Zones



KEY

- Cambridge & S.Cambs Boundaries
- Study Area
- Household Survey Zone

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

GVA Grimley
International Property Advisors

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SOUTH CAMBRIDGESHIRE: MAJOR RURAL CENTRE STORES

TABLE 10
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

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

SOURCE: Household Survey, March 2008

TABLE 11
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	MORRISONS, CAMBOURNE				BUDGENS, SAWSTON				SPAR, SAWSTON				TESCO EXPRESS, HISTON				CO-OP, GREAT SHELFORD				CO-OP, FULBOURN				TOTAL			
	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021	2008	2011	2016	2021
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	887	967	1,055	1,136	0	0	0	0	0	0	0	0	1,981	2,159	2,380	2,536	0	0	0	0	0	0	0	0	2,868	3,126	3,446	3,672
2	0	0	0	0	1,074	1,201	1,419	1,455	0	0	0	0	895	1,001	1,183	1,212	0	0	0	0	0	0	0	0	1,969	2,202	2,602	2,667
3	2,058	2,311	3,042	3,475	0	0	0	0	0	0	0	0	504	564	742	847	0	0	0	0	0	0	0	0	2,573	2,875	3,784	4,322
4	9,021	10,172	10,314	10,370	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	9,021	10,172	10,314	10,370
5	130	132	137	140	2,722	2,763	2,867	2,927	0	0	0	0	358	363	377	385	1,160	1,178	1,222	1,248	0	0	0	0	4,370	4,436	4,603	4,700
6	321	327	324	446	0	0	0	0	0	0	0	0	448	456	452	622	0	0	0	0	1,843	1,876	1,860	2,560	2,611	2,659	2,636	3,627
7	796	843	881	907	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	796	843	881	907
8	199	208	224	243	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	199	208	224	243
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	529	552	591	632	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	282	295	315	337	811	847	906	969
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	160	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	160	0	0	0
14	0	0	0	0	0	543	0	468	0	0	0	0	392	407	436	468	0	0	0	0	0	0	0	0	392	951	436	936
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	1,262	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	273	285	308	333	0	0	0	0	1,535	285	308	333
17	5,343	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	5,343	0	0	0
18	2,403	1,116	0	849	826	0	0	0	601	609	606	617	0	0	0	0	0	0	0	0	0	0	0	0	3,830	1,724	606	1,466
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1,359	1,400	1,474	1,569	0	0	0	0	1,359	1,400	1,474	1,569
TOTALS	**23,119**	**16,629**	**16,579**	**18,196**	**4,622**	**4,508**	**4,286**	**4,850**	**601**	**609**	**606**	**617**	**4,577**	**4,951**	**5,570**	**6,071**	**2,793**	**2,863**	**3,004**	**3,150**	**2,125**	**2,171**	**2,175**	**2,897**	**37,837**	**31,730**	**32,220**	**35,782**

SOURCE: Tables 3 & 10

SOUTH CAMBRIDGESHIRE: OUT-OF-CENTRE

TABLE 12
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

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

SOURCE: Household Survey, March 2008

TABLE 13
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

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

SOURCE: Tables 3 & 12

South Cambridgeshire Council: Rural Centre	SAWSTON

COMPOSITION:	
Number of Units:- ▪ **Convenience** ▪ **Comparison** ▪ **Services** ▪ **Vacant** ▪ **Other**	 8 units 16 units 30 units 2 units 1 units TOTAL – 57 units
Foodstores	Budgens and Spar as well as an independent baker, butchers/delicatessens and greengrocers.
Other Retail Provision	Good range of shops and services including several comparison shops such as an electrical retailer, ladies clothing, card shop, a charity shop and a bookshop. There is also a range of services,.
Other Uses	Public Houses
Description of Unit Sizes	Mix of sizes, mainly with residential uses above. There is one purpose built arcade called the Morley's Place Precinct.
ACCESSIBILITY:	
Public Transport	Good bus links
Pedestrian Linkages	Good with a pedestrian crossing at either end of the main street.
Car Parking	There is a surface car park to the rear of Budgens which was busy and well used at the time of the site visit. Limited on-street parking.
ENVIRONMENTAL QUALITY:	
Built Environment & Landscaping	There is a mix of building styles in Sawston ranging from historic buildings to more modern in-fill additions. Landscaping is minimal and it is considered that this could be improved with the provision of more planting and street furniture designed to be in-keeping with the character of the village.
SUMMARY & RECOMMENDATIONS:	