NORTH WEST cambridge

Retail Impact Assessment

September 2011

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Plans

Appendices

1. Introduction

1.1 This Retail Assessment has been prepared by GVA on behalf of the University of Cambridge (hereafter referred to as the Applicant) to accompany the planning application for the Proposed Development at North West Cambridge for a mix of uses including retail floorspace. This statement specifically examines the appropriateness and implications of the retail and Class A elements of the Proposed Development against the relevant tests of PPS4, the emerging National Planning Policy Framework and other policies.

1.2 This report is divided into the following sections:-

- **Section 2** outlines the Proposed Development of the site, focusing in particular on the provision of a foodstore.
- **Section 3** sets out the planning policy context, including PPS4 and local policies adopted by Cambridge City Council and South Cambridgeshire District Council. In this section we also provide a further recap on the main findings of the relevant technical studies and evidence base reports.
- **Section 4** sets out our Economic Assessment which addresses the sequential test and considers any potential impacts of the Proposed Development in accordance with criteria listed in PPS4.
- **Section 5** presents our conclusions.

2. Site context and development proposals

2.1 North West Cambridge adjoins the southern edge of Girton village and includes all of the open land between the edge of Cambridge and the M11 motorway between Huntingdon Road and Madingley Road. The Application Site extends to 150 hectares and is predominantly farmland aside from a few university buildings.

2.2 The North West Cambridge Area Action Plan emphasises the importance of the Proposed Development containing a local centre to act as a focus for the new community at the heart of the Proposed Development, such as to help create a strong community for those who live and work there and to provide facilities that are capable of benefiting the occupiers of the Proposed Development and nearby areas. This report considers the retail impact of the Proposed Development.

2.3 This report considers the proposals for the development of a 2,000 sqm net[1] convenience store. It also addresses the retail and other Class A uses (A1-A5) proposed as part of the Proposed Development. These uses are consistent with PPS4's definition of a local centre, such as to provide a small supermarket together with shops and other facilities of a local nature which might, for example, include a newsagents, post office, pharmacy, laundrette or local public house. This type of small scale provision is consistent with the North West Cambridge Area Action Plan's allocation for a local centre at this site (discussed in more detail in Section 3). This combination of uses is not expected to generate strategic trips or indeed impact on a wider area. The objective is to provide a sustainably located range of facilities to serve the needs of the new population at the Application Site, consistent with the objectives of PPS4 and local policy.

2.4 For the purposes of this assessment we have assumed that the supermarket will comprise entirely convenience floorspace which is a slight variation to the Informal Planning Policy Guidance on Foodstore Provision in North West Cambridge (March 2011) ("the IPPG") which assumes 5-10% of the floorspace will be dedicated to the sale of comparison

[1]Defined as '*the sales area within a building (i.e. all internal areas accessible to the customer), but excluding checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts*' as set out in the Good Practice Guide (2009)

goods. In reality there is likely to be a small element of comparison goods consistent with the standard supermarket model that retail operators provide elsewhere; however, it is envisaged for the purposes of this assessment that this will be ancillary to the convenience role of the store.

2.5 The Proposed Development comprises includes the Supermarket and other Class A elements referred to in Appendix A in support of a mixed use University led development including:

- Up to 3,000 dwellings; (Class C3 and C4)
- Up to 2000 student bed spaces; 98,000 sqm (Class C2)
- 100,000 sqm employment floorspace, of which:
  - Up to 40,000 sqm commercial employment floorspace (Class B1(b) and sui generis research uses)
  - At least 60,000 sqm academic employment floorspace (Class D1)
- Senior living; 6,500 sqm (Class C2)
- Community Centre; 500 sqm (Class D1)
- Police; 200 sqm (Class B1)
- Primary Health Care; 700 sqm (Class D1)
- Primary School (Class D1)
- Nurseries; 2,000 sqm (Class D1)
- Hotel (130 rooms); up to 7,000 sqm (Class C1)
- Access Roads;
- Pedestrian, cycle and vehicle routes;
- Parking;
- Energy Centre; 1,000 sqm
- Provision and/or upgrade of services and related service media and apparatus;
- Drainage works (including sustainable drainage systems and ground and service water attenuation and control)
- Open space and landscaping (including parks, play areas, playing fields, allotments, water features and formal/informal open space)
- Earthworks to provide revised ground contours.

- Huntingdon Road - Highway and Utility Works
- Construction of a new three arm and a new four arm signal controlled junctions to provide access to the Proposed Development from Huntingdon Road
- Installation of a toucan crossing across Huntingdon Road
- Construction of an unsegregated footway/cycleway on the southern side of Huntingdon Road
- Diversion and/or replacement and/or protection of existing utilities affected by the proposed highway works
- Provision of new telecommunications infrastructure and connection to existing utility infrastructure situated along Huntingdon Road.
- Madingley Road - Highway and Utility Works
- Junction improvement works at the High Cross/Madingley Road junction to alter it from a three arm priority junction to a four arm signal controlled junction to provide access to the Proposed Development
- Installation of a toucan crossing across Madingley Road
- Diversion and/or replacement and/or protection of existing utilities affected by the proposed highway works
- Provision of a new pumped foul water rising main, and new telecommunications, electricity and gas infrastructure and the associated connection to existing utility infrastructure situated along Madingley Road.

3. Policy context

3.1 The following section sets out national planning policy relevant to determination of the planning application. The section provides a review of PPS1, PPS4 and PPG13 and the local policy context.

PPS1: Delivering Sustainable Development (2005)

3.2 PPS1 states that urban regeneration and the re-use of previously developed sites are important supporting objectives for creating a sustainable pattern of development. It states that the Government is committed to:

- concentrating development for uses which generate a large number of trips in places well served by public transport, especially town centres, rather than out-of-centre locations; and
- preferring the development of land within urban areas particularly on previously development sites, provided that this creates or maintains a good living environment, before considering the development of greenfield sites.

3.3 When drawing up their development plans, local planning authorities are encouraged to adopt a sequential approach to site selection for new retail and town centre uses, commencing with existing centres and then if no suitable sites are available, edge-of-centre locations. Only then should out-of-centre proposals be considered.

PPS4: Planning for Sustainable Economic Growth (December 2009)

3.4 PPS4 was published on 29 December 2009 and combined the policy guidance previously provided in PPG4, PPG5, PPS6 and parts of PPS7 and PPG13 into a single policy statement.

3.5 The guidance sets out the importance of using evidence to plan positively, including identifying the need at the local level to assess the need for new economic development and plan proactively to accommodate new development.

3.6 EC1.4 states that when assessing the need for retail and leisure development, local planning authorities should take account of both the quantitative and qualitative need for additional floorspace for different types of retail and leisure uses, and in deprived areas which lack access to a range of services or facilities, and give additional weight to meeting these qualitative deficiencies. When assessing quantitative need, LPAs should have regard to relevant market information and economic data, including a realistic assessment of existing and forecast population levels, forecast expenditure for specific classes of goods to be sold and forecast improvements in retail sales density.

3.7 When assessing qualitative needs, LPAs should assess whether there is provision and distribution of shopping leisure and local services which allow genuine choice to meet the needs of the whole community, particularly those living in deprived areas, in the light of the objective to promote the vitality and viability of town centres, and to take into account the degree to which shops may be over trading and whether there is a need to increase competition and retail mix.

3.8 Policy EC4, Planning for Consumer Choice and Promoting Competitive Town Centres, specifically advises local planning authorities to proactively plan to promote competitive town centre environments and provide consumer choice by, inter alia:

- Supporting a diverse range of uses which appeal to a wide range of age and social groups.
- Planning for a strong retail mix.
- Supporting shops and services and other important small scale economic uses.
- Identifying sites in the centre or failing that on the edge of centre capable of accommodating larger format developments.
- Retaining and enhancing existing markets and where appropriate reintroducing or creating new ones.

3.9 Taking measures to conserve, and where appropriate enhance the established character and diversity of their centres.

3.10 Policy EC5 relates to site selection and land assembly for main town centre uses. Local planning authorities should identify an appropriate range of sites to accommodate identified needs, ensuring that sites are capable of accommodating a range of business

models in terms of scale, format, car parking provision and scope for disaggregation. They should base this approach on the need for development, identify the appropriate scale of development in keeping with the role and function of the centre within the hierarchy and catchment to be served, apply a sequential approach to site selection, assess the impact of sites on the existing centres, and consider the degree to which other considerations, such as physical regeneration, employment and increased investment may be material to the choice of appropriate locations for development.

Development Management

3.11 The development management policies, set out in PPS4, relating to town centre uses, comprise Policies EC10, EC14, EC15, EC16 and EC17.

3.12 EC10 sets out the general considerations which apply to all applications for economic development, considered previously. These include climate change, accessibility, design, economic and physical regeneration and local employment.

3.13 Policy EC 10.1 states that local planning authorities should adopt a positive and constructive approach towards planning applications for economic development, and states that planning applications that secure sustainable economic growth should be treated favourably.

3.14 Policy EC13 relates to applications affecting shops and services in local centres and villages. This recognises the importance of local facilities, and seeks to protect facilities which provide for day to day needs.

3.15 Policy EC14 sets out the supporting evidence for planning applications for main town centre uses. Policy EC14.3 states that a sequential assessment is required for planning applications for main town centre uses that are not in an existing centre and not in accordance with an up to date Development Plan. Policy EC14.4 requires an assessment of the impacts identified in Policy EC16.1 for planning applications for retail and leisure developments over 2,500 sq m gross not in an existing centre and not in accordance with an up to date Development Plan.

3.16 Under a strict interpretation of PPS4 it could be argued that a sequential and impact assessment are not justifiably required in the case of this application given that the

Proposed Development would be within a new local centre allocated by the adopted Area Action Plan (AAP). Further discussion on this matter is reserved until Section 4.

3.17 Policy EC15 sets out the consideration of the sequential approach, however for reasons outlined later in this report, we do not consider is relevant given the that the proposals will create a new local centre allocated by local policy and in accordance with the following definitions set out in PPS4:

> '***Local*** *centres include a range of small shops of a local nature, serving a small catchment. Typically, local centre might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy'*
>
> ***'Supermarket -*** *Self service store selling mainly food with a trading floorspace less then 2,500 square metres, often with car parking'*

3.18 Policy EC16 refers to impact and sets out the impact which applications for main town centre uses not in a centre or in accordance with the Development Plan should be assessed against. These comprise:-

- 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.
- The impact of the proposal on town centre vitality and viability including local consumer choice and the range and quality of the comparison and convenience retail offer.
- The impact of the proposal on allocated sites outside town centres being developed in accordance with the Development Plan.
- In the context of a retail or leisure proposal, the impact of the proposal on in centre trade/ turnover and on trade in the wider area, taking account of current and future consumer expenditure capacity in the catchment area, up to five years from the time the application is made, and where applicable, on the rural economy.
- Located in or on the edge of the town centre, whether the proposal is of an appropriate scale (in terms of gross floorspace) in relation to the size of the centre and its role in hierarchy centres; and
- Any locally important impacts on centres under Policy EC3.1.E.

3.19 Policy EC17 deals with the consideration of planning applications for developments, if not in the centre or in accordance with an up to date Development Plan. Policy EC17.1 suggests that in these circumstances proposals should be refused planning permission where an applicant has not demonstrated compliance with the requirements of the sequential approach or there is clear evidence that the proposal is likely to lead to a significant adverse impact of any one of the impacts in Policies 10.2 and 16.1, taking into account the cumulative effect of recent permissions, developments under construction and completed developments.

3.20 Policy EC17.2 suggests that when no significant impact has been identified, planning applications should be determined by taking account of the positive and negative impacts of the proposal in terms of Policies EC10.2 and 16.1 and any other material considerations, and the likely cumulative effect of recent permissions. Judgements about the extent and significance of any impact should be informed by the Development Plan where this is up to date. Recent local assessment of the neighbouring centres which take into account the vitality and viability indicators in Annex D of PPS4 and any other published local information, such as the town centre or retail strategies will also be relevant.

Planning for Town Centres: Practice guidance on Need, Impact and the Sequential Approach (December 2009)

3.21 The Good Practice Guide is a government document published alongside PPS4. It does not constitute a statement of Government policy, but forms guidance to support the interpretation of town centre policies set out in PPS4.

3.22 The guide sets out that in allocating sites to accommodate town centre needs local authorities should actively examine existing and potential sites within centres or on the edge of town centres. It goes on to say that 'they [local authorities] should consider the scope to expand existing centres and promote new ones' (Para 4.9).

3.23 Paragraph 6.18 of the guide highlights that planned new centres should be considered through the LDF process, giving consideration to the appropriateness of new centres, the scale and form and matter such as impact on the hierarchy and network of centres, in accordance with national policy. It is then clearly stated that 'where the need is identified to create a new centre, and the appropriate policy tests are met, it will not be

necessary to apply a sequential approach to consider whether proposals planned within the new centre could be met in nearby existing centres'.

3.24 Where the sequential approach applies, the guide highlights that there are two important objectives of the sequential approach to site selection:

- The first being the assumption that town centre sites are likely to be the most readily accessible by alternative means of transport thereby reducing the need to travel, and
- The second is to accommodate main town uses in locations where customers are able to undertake linked trips in order to provide for improved consumer choice and competition.

Emerging National Planning Policy

3.25 The Government has published the draft National Planning Policy Framework ("the Draft NPPF") for consultation. The NPPF will replace the current suite of national Planning Policy Statements, Planning Policy Guidance notes and some Circulars with a single, streamlined document.

3.26 The NPPF will set out the Government's economic, environmental and social planning policies for England. Taken together, these policies articulate the Government's vision of sustainable development, which should be interpreted and applied locally to meet local aspirations. The draft NPPF continues to recognise that planning system is plan-led and that therefore Local Plans, incorporating neighbourhood plans where relevant, are the starting point for the determination of any planning application. In assessing and determining development proposals, local planning authorities should apply the presumption in favour of sustainable development and seek to find solutions to overcome any substantial planning objections where practical and consistent with the NPPF.

3.27 While the NPPF is to be read as a whole in the context of retail considerations the Draft NPPF states at paragraph 78 (as with PPS4) that local planning authorities should prefer applications for retail and leisure uses to be located in town centres where practical, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. In applying this sequential approach, local planning authorities should ensure that potential sites are assessed for their availability, suitability and viability and for their ability to meet the full extent of assessed quantitative and qualitative needs.

3.28 The Draft NPPF continues to require an impact assessment when assessing applications for retail and leisure development outside of town centres, which are not in accordance with an up to date Local Plan, if the development is over a proportionate, locally set floorspace threshold or, if no locally set threshold, the default threshold is 2,500 sqm.

3.29 The Draft NPPF also states that planning policies and decisions should assess the impact of retail and leisure proposals, including:

- 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 wider area, up to ten years from the time the application is made., In the case of North West Cambridge this would be 2021. This is in contrast to PPS4 where the time horizon for assessing impacts of unplanned, retail and leisure schemes in the edge or out of centre locations is currently set at up to 5 years from the time the planning application is made.

The assessment work that has been undertaken in this Retail Assessment considers both 2016 and 2021.

Local Policy Context

3.30 This Section sets out the policies of the Development Plan relevant to determining the planning application. The main planning policy documents for the application include adopted documents from both Cambridge City Council and South Cambridgeshire District Council due to the cross boundary nature of the Application Site. We set out below a review of the relevant policies contained within the adopted Cambridge City Local Plan, the South Cambridge Core Strategy and the North West Cambridge Area Action Plan.

Cambridge Local Plan

3.31 The Cambridge Local Plan is the City's current local plan and was adopted by the Council in July 2006. As a result of changes to the planning system which were introduced by the Planning and Compulsory Purchase Act 2004 local plans expired, but in July 2009 the Secretary of State issued a formal direction to 'save' the majority of policies contained

within the Cambridge Local Plan. The Cambridge Local Plan is in the process of being replaced by the Local Development Framework (LDF) for the city. Prior to this being formally replaced, the saved policies from the Local Plan continue to be used as the basis on which all development control decisions are made.

3.32 The retail and shopping policies are set out in Section 6 of the Plan. Policy 6/9 relates to Convenience Shopping which generally supports additional provision in the new urban extensions. However, it states that the need for provision in major urban extensions will be assessed as part of the preparation of Masterplans.

3.33 Section 9 of the Local Plan identifies areas of major change in Cambridge, including urban extensions. The Application Site is included in the list of sites although the direct policy relating to the site between Madingley Road and Huntingdon Road was superseded when the North West Cambridge Area Action Plan was adopted (see below). Other areas of major change include East Cambridge, Southern Fringe, Northern Fringe, Huntingdon Road / Histon Road and the Station Area.

Cambridge Development Strategy (Issues and Options Paper 2007)

3.34 The Cambridge Development Strategy (Core Strategy) is currently being prepared. The latest version of the policy document is the Issues and Options paper, and the 'Preferred Options' version of the document is due for public consultation later in the year. Various 'Options' are proposed in the Development Strategy.

3.35 Option 7 states that the University of Cambridge's further growth needs will be accommodated in North West Cambridge between Madingley Road and Huntingdon Road. Option 25 is to allow for and enable development / redevelopment to meet the proven needs of the Applicant to strengthen Cambridge's role as a world leader in Higher Education.

3.36 With regard to a hierarchy of centres, Option 26 proposes that the City Centre should be the focus for shopping, service and leisure uses, then the new large district centre at East Cambridge, then district centres and finally local centres. A sequential approach would be applied to site selection using this hierarchy. It is envisioned in this option that the urban extension areas would only have local centres.

South Cambridgeshire Core Strategy (adopted January 2007)

3.37 The South Cambridgeshire Core Strategy was adopted in 2007 and represents the main current policy document for the District. The Core Strategy draws on national policy set out in PPS6: Planning for Town Centres, which has since been replaced by PPS4.

3.38 The strategic vision for South Cambridgeshire seeks to focus much of the high level development needed to improve the balance between homes and jobs in the sub-region into urban extensions to the built-up area of Cambridge. The objective is that these locations will become successful, vibrant, healthy new communities. It is acknowledged that there will be a need for shopping provision in the urban extensions although it states that further guidance on proposals for convenience and comparison retail in the urban extensions will be contained within the relevant Area Action Plans.

North West Cambridge Area Action Plan (adopted October 2009)

3.39 The North West Cambridge Area Action Plan (AAP) was developed jointly by Cambridge City Council and South Cambridgeshire District Council. The AAP identifies land to be released from the Cambridge Green Belt to contribute towards meeting the development needs of the University of Cambridge. It establishes an overall vision and objectives to achieve this and provides the basis for the initial planning permissions and further detailed planning, including masterplanning.

3.40 The plan acknowledges the Applicant's aspirations for the site which include new student accommodation, academic facilities, and research institutes in addition to a substantial residential component (a significant proportion of which should be key worker housing for University staff), commercial research and development space, hotel and conference facilities, community facilities (including shops), public open space and nature conservation areas.

3.41 The vision for North West Cambridge is set out in Policy NW1 which states that there will be a new local centre which will act as a focus for the development and which will also provide facilities and services for nearby communities. Policy NW3 sets out the requirement for a Masterplan for the whole site to be prepared and submitted as part of the supporting information for a planning application to ensure that the development will be delivered in accordance with the principles set out in the AAP.

3.42 The provision of community services and facilities is supported in Policy NW20 which states that the development will provide an appropriate level and type of high quality services and facilities in suitable locations to serve all phases of the development. In order to identify the appropriate level, detailed assessments and strategies will be required to be prepared with key stakeholders prior to the granting of planning permission.

3.43 The principle of a local centre is established in local planning policy by Policy NW21. The policy states that 'where appropriate, all services and facilities will be provided in a single centre at the heart of the development'. The supporting text highlights that, subject to the required strategies and masterplanning, the local centre will comprise a range of services and facilities including the following: primary schools; an appropriate level of local shopping (e.g. a small supermarket) and other services; a library and life-long learning centre; community meeting rooms; and healthcare provision.

Other Material Considerations

3.44 In addition to the adopted Development Plan documents, regard may also be had to the following published local information in the determination of the planning application.

Cambridge Sub Region Retail Study (2008)

3.45 The Cambridge Sub Region Retail Study was produced by GVA in October 2008. The Study comprises a thorough overview of the existing retail network and hierarchy across the Cambridge and South Cambridgeshire administrative areas and an assessment of the likely future demand for additional retail provision taking into account factors such as major housing growth.

3.46 The Study identified good provision of convenience stores in the sub region with a good coverage of different foodstore operators although Tesco was found to have a marginally stronger presence. The quantitative analysis indicates that the convenience stores are performing well and the strong performance of convenience stores in the local and district centres highlights the importance of providing everyday 'top-up' shopping facilities for existing residents and residents in new urban extension areas.

3.47 The Study identifies global capacity for new convenience floorspace over the plan period, forecasting capacity to support a further 5,570 sqm net of additional convenience

goods floorspace by 2011, increasing to 10,265 sqm net by 2016 and 31,390 sqm net by 2021 taking into account the following commitments:-

- Land to the north of unit 3, 11 High St, Cherry Hinton - 35 sqm net;
- 186-188 High Street, East Chesterton - 24 sqm net;
- Land at Arbury Camp, Impington (now known as Orchard Park) - 1,858 sqm net; and
- Land at 23 Church Street, Willingham - 63 sqm net.

3.48 However, the study notes that this capacity could be absorbed by convenience goods developments in the pipeline comprising:-

- Cambourne - small unit shops - 1,503 sqm net (by 2011);
- Northstowe - 5,525 sqm net (2016 - 2021);
- East Cambridge - district centre - 3,000 sqm net (by 2021);
- Station Area – 507 sqm net (by 2016);
- Southern Fringe - local centre - 682 sqm net (by 2016); and
- Huntingdon Road / NIAB - 1,140 sqm net (by 2016).

3.49 The phasing of the pipeline schemes were estimated and the Study anticipates that all of the pipeline developments will be built and trading by 2021. Based on this assumption the scenario testing indicates that with all of the pipeline schemes and the full build out of Northstowe, residual expenditure capacity to support new floorspace would be removed and there would be a small over supply of floorspace.

3.50 However, the Study also notes that the Northstowe phasing details provided as part of the Northstowe planning application state that all of the convenience floorspace at Northstowe may not be completed until 2024/25, and as such more expenditure would be available to support new development, reducing the over supply of floorspace. The following table summarises the findings of the Sub Region Study's capacity forecasts.

Table 3.1: Cambridge Sub Region Global Convenience Goods Capacity (sqm net)

	2008-2011 (sqm net)	2008-2016 (sqm net)	2008-2021 (sqm net)
Baseline Capacity	5,570	10,265	13,390
Forecasts Capacity taking into account Pipeline Developments	4,913	4,244	1,272

Source: Tables 20 & 21, Appendix 5, Cambridge Sub Region Retail Study, October 2008.

3.51 The Study provides a preliminary view of the retail matters arising from the Northstowe proposals. It does not investigate convenience goods impact although at a strategic level it considers that the impact of the convenience goods floorspace in Northstowe will largely fall upon existing out-of-centre stores at Bar Hill and Milton.

3.52 The Study looks at global capacity for future convenience goods retailing in the sub region and does not drill down to the local level. In respect of convenience goods, the study provided the following recommendations:

- In accordance with planning policy priorities the focus for further convenience goods development should be on both existing and proposed district, local and rural centres.
- In the existing district, local and rural centres, where opportunities arise there will be scope for more small scale convenience goods provision to supplement existing roles and functions.
- There is a need for additional deep discounter provision within the Cambridge sub region and the focus of this should in the first instance be the district, local and rural centres.
- New larger convenience stores at East Cambridge and at Northstowe, in conjunction with smaller scale provision elsewhere, would be sufficient to meet convenience shopping needs in the Cambridge sub region.

North West Cambridge Supplementary Retail Study (February 2010)

3.53 The Supplementary Retail Study was commissioned by Cambridge City Council and South Cambridgeshire District Council in order to provide a more detailed retail planning evidence base for North West Cambridge and to inform a view on potential emerging proposals for foodstore development in the area.

3.54 The Study updates the global capacity assessment provided in the 2008 Cambridge Sub-Region Retail Study. Taking into consideration lower expenditure growth rates and a combination of different input assumptions, the updated figures suggest a lower quantum of convenience floorspace capacity to 2021 than that identified within the 2008 Study. The baseline forecasts identify global capacity to support an additional 3,033 sqm net convenience floorspace by 2011, increasing to 8,159 sqm net by 2016 and 12,363 sqm net by 2021. Taking into account pipeline developments, the Study identifies residual capacity to support 333 sqm net additional floorspace at 2016, increasing to 867 sqm net at 2021.

3.55 Drawing on the results of the same household survey work undertaken for the 2008 Study, NLP examine the local need for convenience foodstore floorspace in the North West Cambridge area at a more detailed level. The baseline quantitative need assessment identifies capacity for an additional 234 sqm convenience floorspace at 2011, based on a large foodstore operator achieving a sales density of £10,000 per sqm.

3.56 A qualitative need for a main foodstore in the North West Cambridge area is also identified on the basis that there is an evident gap in main foodstore provision in the area resulting in high levels of expenditure leakage and unsustainable travel patterns. NLP conclude that 'there is a clear need for easily accessible large foodstore provision to serve the main food shopping needs of existing and new residents, to increase choice and competition' (paragraph 3.61).

3.57 Further scenario testing examines capacity taking into account pipeline developments and potential uplift in market share. Scenario 3 (the most realistic scenario) assumes a main foodstore in the area could achieve a market share similar to those achieved by other main foodstores in Cambridge. This would result in a surplus of £39.1m at 2021, over and above existing commitments and pipeline developments.

3.58 NLP examine four alternative options for meeting the identified need at 2021 within proposed local centres across the three North West Cambridge development sites. In the long term (up to 2021) either a single superstore (c.3,500 sqm net) or two supermarkets (2,000 sqm net) are considered the most appropriate main foodstore provision within the planned local centres to meet identified need in the area. Having examined the relative merits of new foodstore provision in the three new centre locations, NLP conclude that either the Application Site or the NIAB site offer a better location for a larger local centre than Orchard Park. The Study identifies very few differences in the advantages and disadvantages between the application and NIAB sites.

Informal Planning Policy Guidance on Foodstore Provision in North West Cambridge (March 2011)

3.59 Cambridge City Council and South Cambridgeshire District Council have recognised that existing planning policy does not adequately address retail needs in North West Cambridge. The Councils have therefore adopted Informal Planning Policy Guidance (IPPG) on Foodstore Provision in North West Cambridge.

3.60 The IPPG is informed by two background studies – the Supplementary Retail Study prepared by Nathaniel Litchfield (see above) and a Transport Study completed by Atkins. The evidence base was used to develop an Options Report which set out four possible options for foodstore development in North West Cambridge. The Options Report was subject to public consultation in September 2010.

3.61 The adopted IPPG sets out the development principles for foodstore development in North West Cambridge which developers should follow in any planning applications for a foodstore or local centre at these sites. The strategy for foodstore provision in North West Cambridge is:

- One medium sized supermarket of 2,000 sqm net floorspace in the local centre at the Application Site;
- One medium sized supermarket of 2,000 sqm net floorspace in the local centre at the NIAB site; and
- One small supermarket in the local centre at Orchard Park.

3.62 This strategy provides for two medium-sized supermarkets which will serve the two larger communites and help to reduce the number of unsustainable car journeys to foodstores outside North West Cambridge. It is accepted that the stores will not be so large that they would over dominate and prevent the development of other smaller shops and services in the local centres, which is an important factor in creating a vibrant and viable centre. Residents will also have the additional choice of two different foodstore operators. Residents of Orchard Park will have access to a small supermarket catering for day-to-day needs, but will also be in close proximity to the medium-sized supermarkets at NIAB and the Application Site and the existing Tesco store in Milton.

3.63 In terms of phasing, the IPPG indicates that the medium-sized supermarkets and local centres at the Application Site and NIAB site should be delivered in the early phases of these developments. Early delivery of the foodstores will have the benefit of anchoring the local centre in the early stages and creating linked trips to other shops and community facilities.

4. Economic assessment

4.1 This section presents our assessment of the proposals for a 2,000 sqm net supermarket along with up to 1,800 sqm net of other Class A (A1/A2/A3/A4/A5) floorspace comprised in the Proposed Development against the relevant policy tests set out in PPS4 and the Draft NPPF. An indicative schedule of proposed retail floorspace is attached in Appendix 1.

4.2 Under the provisions of PPS4 and the Draft NPPF it is no longer a requirement for an applicant to assess need as part of the application making process. In this case there is no requirement for the Applicant to examine impact or demonstrate compliance with the sequential approach. In terms of PPS4 and the Draft NPPF the majority of the Proposed Development will be 'in centre' in that, as contemplated by paragraph 6.18 of the Practice Guidance accompanying PPS4, the local centre is a planned new centre by designation through LDF and related Area Action Plan policy[2] as a 'local centre'.

4.3 It is envisaged that a small proportion of the proposed Class A floorspace (225 sqm net) will be delivered beyond the designated Local Centre in the form of individual 'local' shops. It is intended that these shops will serve a limited, walk-in catchment and will help meet the local needs of the new residential community in a sustainable manner.

4.4 In addition, the Class A elements of the Proposed Development would include a University-run cafeteria (A3 use) comprising c.600 sqm net. This would be directed at the needs of the University students and staff on-site and would not therefore result in any significant impacts on the wider area.

4.5 Notwithstanding the analysis above, we have, for the purposes of completeness and to assist the Councils, considered need, impact and the sequential test for all Class A 'town centre' uses as part of our economic assessment set out below.

[2] North West Cambridge Area Action Plan (October 2009)

Need

4.6 As highlighted in Section 3, there is already a substantial amount of evidence demonstrating a clear quantitative and qualitative need for new foodstore provision in North West Cambridge in order to adequately serve the main food shopping needs of both existing and new local residents. This is acknowledged by the local authorities and further investigation is currently underway to establish the most appropriate means to deliver new provision. The applicant has had regard to the Councils' IPPG on Foodstore Development in North West Cambridge (March 2011) and is proposing the development of a 2,000 sqm net anchor convenience store at the Application Site which is entirely consistent with the strategy set out in the IPPG (see Section 3). The Proposed Development also includes up to 1,800 sqm net other Class A floorspace (A1-A5). An indicative breakdown of this floorspace appears at Appendix A.

4.7 The IPPG on Foodstore Development in North West Cambridge is informed by the North West Cambridge Supplementary Retail Study (2010) and the findings of this Study are therefore relevant in consideration of the Applicant's proposals. As highlighted in Section 3, the Study provides an update to the 2008 Retail Study and specifically examines the local need for convenience foodstore floorspace in the North West Cambridge area. Without reiterating the overview provided in Section 3, the main findings in terms of need and capacity are outlined below:

Qualitative Considerations

- There is a high level of convenience trade leakage (84%) from the PCA[3] as existing residents travel outside the local area to undertake main food shopping.
- There is a lack of choice in terms of the type and format of convenience store, as there are no main foodstores within this part of the City. The closest stores capable of meeting existing residents' main food shopping requirements are:
  - Tesco, Milton;
  - Sainsbury's & M&S stores in Cambridge City Centre;

[3] Primary Catchment Area comprising the five postal sectors (CB3 0, CB4 0/2/3/9) which correlate most closely to North West Cambridge and contain the three new centres proposed at the Application Site, NIAB site and Orchard Park.

  - Asda, Beehive Centres; and
  - Tesco Extra, Bar Hill.

- As a group, the existing convenience stores in the North West Cambridge area are overtrading.
- There is a large existing residential population, due to increase by 45%, which is not served by a main foodstore within the catchment.
- The areas covered by Orchard Park, the NIAB site and the Application Site are not within easy walking distance of any existing stores.

4.8 In view of the above, NLP conclude that 'there is a clear need for easily accessible large foodstore provision to serve the main food shopping needs of existing and new residents, to increase choice and competition'. Furthermore, the addition of large-format foodstore provision on the Application Site would significantly reduce leakage of expenditure from the PCA and bring about more sustainable travel patterns.

Quantitative Capacity

4.9 Taking into account the qualitative need for main foodstore provision on the Application Site and existing commitments for additional convenience floorspace in the area, the NLP Study identifies surplus expenditure in the region of £6.9m by 2016, increasing to £10.5 by 2021. Assuming a large foodstore operator achieving a sales density of £10,000 per sqm this would translate into floorspace capacity for an additional 680 sqm net at 2016, increasing to 1,023 sqm net by 2021. However this is based on a constant market share and NLP recognise that, given existing deficiencies and subsequent levels of trade leakage, this is not entirely realistic.

4.10 In NLP's view, the most realistic scenario assumes that a main foodstore on the Application Site would achieve a similar market share similar to those achieved by other main foodstores in Cambridge. NLP test an increase in market share of 16% from the PCA and 8% from the SCA[4] which consequently increases surplus available expenditure at 2016 to £30.9m, increasing to £39.1m by 2021. In floorspace terms, this suggests capacity to

[4] Secondary Catchment Area includes Cambridge City and the settlements of Bar Hill, Cambourne and Milton and surrounding rural area to the north west of Cambridge.

support an additional 3,044 sqm net convenience floorspace by 2016, increasing to 3,791 sqm net by 2021 (assuming a large store sales density of £10,000 per sqm net). This is over and above existing commitments and development in the pipeline which include small convenience store provision at both the Application Site and NIAB site.

4.11 The pipeline proposals at the Application Site adopted by the North West Cambridge Supplementary Retail Study (SRS) assume a small supermarket of c.1,625 sqm net which would achieve an estimated turnover of £8.3m at 2016. The Applicant is in fact proposing a larger store comprising 2,000 sqm net convenience goods floorspace and the estimated turnover would be in the region of £20.3m at 2016 based on a sales density of £10,000 per sqm and assuming 0.3% growth per annum in sales efficiency post 2011. If we assume that a larger store with a turnover of £20.3m would also come forward at the NIAB site (2,000 sqm net) in addition to existing commitments (£3.9m) there will still, however, be a surplus of available expenditure in the region of £4.5m at 2016 and capacity to support an additional 443 sqm net convenience goods floorspace. Taking into account expenditure growth and an allowance for increased sales efficiency, there will be a greater surplus of available expenditure of £12.3m by 2021, equating to capacity to support 1,194 sqm net.

4.12 If we adopt a more cautious approach and apply a higher average sales density of £12,000 per sqm to the Application Site and NIAB stores the estimated turnover of each would be £24.4m at 2016 (£48.8m combined), increasing to £24.7m at 2021 (£49.5m combined). After also taking into account the estimated turnover generated by existing commitments (£3.9m), this would result in a modest deficit of £3.7m and only a very marginal oversupply of floorspace in the region of -364 sqm net at 2016. Given existing deficiencies and quantitative need for foodstore provision in the area this level of oversupply is not considered significant. In any event, even taking into account the Application Site and NIAB stores over and above existing commitments, there will still be a surplus of c.£4m arising at 2021.

4.13 Furthermore, this modest oversupply of floorspace at 2016 is only identified in the worst case scenario assuming a store at both the Application Site and at the NIAB site will achieve a sales density of £12,000 per sqm. In reality, if both stores were delivered simultaneously we would expect some level of competition to occur between the two and it may be the case, in the short-term at least, that the stores do not achieve the high turnovers estimated. In any event, the analysis demonstrates that there is likely to be

sufficient capacity to support both stores and committed development in the short-term (by 2016) and certainly over the longer-term (by 2021).

Site Specific Need

4.14 The local centre is a vital component of the wider development proposals at the Application Site. The principle of a local centre is established by the AAP vision (Policy NW1) which states that 'there will be a new local centre that will act as a focus for the development and which will also provide facilities and services for nearby communities'. Policy NW21 of the AAP re-emphasises this and requires a single centre to be provided in the heart of the Proposed Development to ensure that it will assist in bringing together the two parts of the Proposed Development either side of the strategic gap. A local centre and local shops are fundamentally important to the sustainability of the Proposed Development, to reducing the need to travel, and to establishing a sense of community and identify within the Proposed Development.

4.15 Consistent with PPS4, the AAP defines a Local Centre as a:

> *'small grouping usually comprising a newsagent, a small supermarket, a sub-post office and occasionally a pharmacy a hairdresser and other small shops of a local nature'*

4.16 PPS4 defines a supermarket as a self-service store selling mainly food, with a trading floorspace less than 2,500 sqm. The Applicant's proposal for a foodstore comprising 2,000 sqm net floorspace predominantly for the sale of convenience goods is therefore an appropriate scale for the new local centre and accords with the PPS4 definition of a local centre. A store of this scale is also sufficient to accommodate a main food format which will contribute towards meeting both existing and future main food shopping needs for the Proposed Development.

4.17 The Applicant's proposal for up to 1,300 sqm net of other Class A floorspace (A1-A5) alongside the supermarket within the local centre will enable the provision of several suitably-sized shop units that may accommodate a range of retail and service providers which together will form a local centre in accordance with the PPS4 definition.

4.18 The AAP requires that the provision of community services and facilities (including the local centre) are 'provided at an early stage in the development to ensure that the new

community has the opportunity to be sustainable by using local services rather than travelling to use those provided outside its area'. It is evident from NLP's Study that given existing deficiencies in main foodstore provision, there is currently significant leakage of expenditure from the area.

4.19 As highlighted in Section 3, the Applicant is proposing the development of c.3,000 new dwellings and c.2,000 student bed spaces which will substantially increase the resident population within the North West Cambridge area. The phasing assumes that by 2017 between 1000 and 1850 dwellings could have been delivered. If we assume that approximately 1,055 new dwellings will be delivered by 2016 and apply an average of 2.2 persons per household, theoretically this could result in a new resident population of 2,321 people at 2016. Factoring in expenditure growth[5] and an allowance for SFT[6], we estimate the average per capita spend on convenience goods will be £1,491 in 2016. By 2016 therefore, the new resident population alone has potential to generate at least £3.5m convenience goods expenditure.

4.20 If we also factor in the delivery of 500 student bed spaces and assume that average student spend on convenience goods is broadly 25% lower than the per capita spend (£1,118[7]) in 2016, 500 students would generate approximately £0.6m. Together with new housing development, the total expenditure generated on-site could be in the region of £4m by 2016. In 2021 upon completion of all new housing (3,000 dwellings) and student accommodation (up to 1,900 bed spaces), this could increase to c.£12m by 2021.

4.21 If we undertake the same process for comparison goods expenditure, we estimate that the average per capita spend on comparison goods will be £2,774 in 2016 (taking into account expenditure growth[8] and an allowance for SFT[9]). The new resident population alone has potential to generate £6.4m comparison goods expenditure by 2016, increasing to £21m by 2021.

[5] -2.9% - 2008-09; 0.3% 2009-10; 0% 2010-11; 0.4% 2011-12; 0.6% 2012-13; 0.6% 2013-18; 0.7% post 2018

[6] 3% at 2008; 3.5% at 2009; 3.8% at 2010; 4% at 2011; 4.3% at 2012; 4.5% at 2013; 4.7% at 2014; 4.8% at 2015; and 5% at 2016

[7] This is a cautious approach as the Experian per capita figures already include student households in generating the average spend.

[8] Comparison expenditure growth: -0.6 - 2008-09; 0.4% 2009-10; 1.2% 2010-11; 2.4% 2011-12; 2.7% 2012-13; 3.0% 2013-14; 3.2% 2014-5; 3.4% 2015-16; 3.6% 2016-17; 3.7% post 2017.

[9] 6% at 2008; 7.5% at 2009; 8.1% at 2010; 8.7% at 2011; 9.4% at 2012; 10% at 2013; 10.2% at 2014; 10.4% at 2015; and 10.5% at 2016

4.22 It is acknowledged by NLP that out of the three sites the Application Site is currently the least well served. in the absence of new foodstore provision coming forward in the immediate short-term, it is therefore reasonable to assume that the expenditure generated by new on-site resident and student population at the Application Site will adopt similar shopping patterns to those existing which will further exacerbate unsustainable patterns of travel.

4.23 The findings of the NLP Study, which broadly examines the relative merits of delivering a main food store on one of the three sites, concludes that there are very few differences between the application and NIAB sites. At present however the aspirations for a larger foodstore at the NIAB site are unknown and there is evidently a clear need for main food store provision now. The Applicant is proposing to provide an adequate foodstore and other Class A uses which will contribute towards meeting identified need in the short-term.

4.24 Overall, there is a clear site-specific need for the proposed foodstore and Class A uses to be located at the new local centre in the heart of the Application Site to serve the new community on the site and to ensure sustainability. Furthermore it is reinforced in policy that this store, as a vital component of the local centre, should be delivered in the early stages of the Proposed Development to ensure that it is able to establish itself as the focus of the community and contributes towards developing a sustainable community from the outset.

4.25 Beyond the local centre the Proposed Development includes the provision of a University-run cafeteria which, by the nature of its function will need to be physically associated with the University buildings and directed at meeting the needs of the University students and staff on-site, though it will be publically accessible. On this basis the facility cannot be located in any other sequentially preferable location.

4.26 The Proposed Development also includes c.225 sqm net of retail floorspace which is intended to comprise individual local shops serving localised, walk-in catchments. Such provision is intended to ensure that the new residential population has adequate and sustainable access to local shopping facilities in accordance with PPS4 and the Draft NPPF. The provision of such facilities within the proposed local centre would only serve to replicate the local centre's facilities' and would not achieve the sustainability objectives sought by providing them elsewhere in the Proposed Development.

Sequential Approach

4.27 In dealing with the sequential approach to site selection, PPS4 Policy EC14.3 and the Draft NPPF requires an assessment to be carried out of sequentially preferable sites within the defined catchment area to determine their suitability, viability and availability to accommodate the application proposals. However, it only requires such an assessment to be carried out for sites that are not in an existing centre nor allocated in an up to date development plan document.

4.28 Paragraph 6.18 of the guide accompanying PPS4 highlights that planned new centres should be considered through the LDF process and that 'where the need is identified to create a new centre, and the appropriate policy tests are met, it will not be necessary to apply a sequential approach to consider whether proposals planned within the new centre could be met in nearby existing centres'.

4.29 The adopted AAP for North West Cambridge (a Development Plan Document and part of the Local Development Framework for both Cambridge City Council and South Cambridgeshire District Council) currently allocates an appropriate level of local shopping as part of a new local centre at the Application Site. In accordance with the AAP, the Masterplan demonstrates the foodstore proposal of 2,900 sqm gross (2,000 sqm net convenience) will be integrated, along with up to 1,300 sqm gross (975 sqm net) of other retail uses (A1-A5), into the boundary of the proposed local centre (which will effectively comprise the Primary Shopping Area), and, once developed, the foodstore and ancillary retail uses will therefore effectively form an 'in centre' proposal.

4.30 For the purposes of Policy EC14.3 and the Draft NPPF, therefore the proposal is both 'in centre' and in accordance with an up to date Development Plan (AAP). A sequential assessment (under EC15) is therefore not, on the basis of DCLG guidance, required. However, to assist the Councils we have, nevertheless, considered the individual merits of the application against other similar proposals coming forward in the wider area (e.g. at the NIAB site), particularly in the context of identified need demonstrated above.

4.31 We have also given some consideration to the small proportion of retail floorspace proposed beyond the local centre. As highlighted in the indicative floorspace schedule in Appendix 1, this includes a University-run cafeteria (c.600 sqm net) and small,

conveniently-located local shops (c.225 sqm net) intended to serve local, walk-in catchments across the Proposed Development.

Impact Assessment

4.32 In this section, we present our assessment of impacts in accordance with the criteria listed under Policy EC16.1 of PPS4 and the Draft NPPF. Again, assessment of impact in accordance with EC16.1 of PPS4 and the Draft NPPF is not required in relation to uses within the local centre as that development will be 'in-centre' and in accordance with an up-to-date Development Plan (AAP). A small proportion of retail floorspace proposed may be provided beyond the local centre. Therefore, for the reasons rehearsed above, we have considered each requirement of PPS4 in turn below.

4.33 In accordance with PPS4 and the Draft NPPF, the level of detail and type of evidence provided below is proportionate to the scale and nature of the proposals and its likely impact. Given the propensity for the proposed foodstore to draw from a wider catchment, and therefore to have wider impact implications, we have undertaken a full impact assessment of the foodstore proposals. We have also considered the effects of other proposed Class A uses, although given that this will be either small-scale and integral to the local centre or small scale, located within the wider development area and serve an even more localised catchment, the impact implications will be lower and the detail of our assessment is proportionate to this.

a) Impact on existing, committed and planned public and private investment

4.34 It is acknowledged that there is a significant level of planned retail investment in Cambridge and South Cambridgeshire, including proposed new centres to be located at Cambridge East, the Station Area, the Southern Fringe and at Northstowe. These are taken into account as commitments within NLP's assessment and as part of our own analysis above which demonstrates that there is sufficient capacity to support the Applicant's proposals in addition to planned investment elsewhere in the City.

4.35 Furthermore, our analysis indicates sufficient surplus available capacity to support an increased amount of convenience floorspace at the NIAB site in conjunction with the floorspace proposed by the Applicant and without the need to phase delivery between the sites. On this basis it is clear that the Proposed Development will not have any impact on existing, planned public or private investment.

b) Impact on town centre vitality and viability

4.36 Consideration of impact of town centre vitality and viability is inextricably linked with an analysis of existing shopping patterns and assumptions of trade draw from existing stores/centres which is set out in more detail under d) Impact on trade/turnover. We have assessed the cumulative effects of the proposed foodstore at the Application Site alongside additional convenience goods floorspace at Orchard Park (623 sqm net) and at the NIAB site (2,000 sqm net).

4.37 It is evident from our analysis that the majority of foodstores referred to under section d) below are located out-of-centre and therefore receive no planning policy protection under PPS4. Based on our analysis of existing shopping patterns we expect that there will be some trade draw from foodstores located within Cambridge City Centre (e.g. Sainsbury's & M&S Simply Food) and to a lesser extent from more local provision at Histon Road Local Centre (e.g. Aldi, Co-Op & Iceland).

4.38 The 2008 Retail Study examined the health of Cambridge City Centre which highlighted a strong performance against most of the PPS4 indicators. Given the sub-regional status of the centre and its attraction as a higher order comparison shopping and tourist destination, it is anticipated that the proposals will have a minimal effect on the centre's on-going vitality and viability. The proposed foodstore will primarily serve new residents and students on-site whilst the city centre convenience provision will continue to serve the significant number of tourists and workers as well as local residents visiting the city centre for higher order retail, leisure and business trips.

4.39 Similarly, the findings of the 2008 health check analysis of Histon Road highlights that it is a vital and viable local centre. Given the local nature of foodstore provision within the centre, we would expect that these stores are used for 'top-up' rather than 'main' food shopping trips and we would therefore expect trade diversion from these stores to be relatively minor.

4.40 There are no other centres within the catchment area which would likely be affected by the proposals.

4.41 In conclusion, the combination of proposed convenience goods floorspace at the Application Site (2,000 sqm net) alongside provision at Orchard Park (623 sqm net) and at the NIAB site (2,000 sqm net) is not expected to have an adverse impact on the vitality

and viability on existing centres. On the contrary, given the deficiency in existing provision, it is expected that the proposals will have a positive impact on local consumer choice and significantly enhance the range and quality of the convenience retail offer within the North West Cambridge area.

4.42 Given the complementary and small-scale function, of other retail uses on the Application Site and the more localised catchment they will serve we do not anticipate that these other uses will impact on the vitality and viability of existing centres in the wider area.

c) Impact on allocated sites outside town centres being developed in accordance with the development plan

4.43 As highlighted in Section 3, there are a several planned urban extensions around Cambridge and policy support for shopping provision in these areas to meet the local needs of residents. In brief, the Development Plan[10] makes provision for one large district centre and up to six local centres at Cambridge East; a new town centre and local centres at Northstowe; an allowance for additional retail provision at Cambridge Southern Fringe and around Cambridge Station.

4.44 Given the geography of the growth areas it is not anticipated that the Proposed Development will affect the delivery of allocated sites at the Southern Fringe or Cambridge Station. Furthermore, it is clear that the role of planned centres, including that at the Proposed Development, are primarily coming forward to meet the arising needs of the planned new communities respectively. It is therefore considered that the proposals for the Application Site will not affect the deliverability of other planned local centres from coming forward in accordance with the Development Plan.

d) Impact on trade/turnover

4.45 We have assessed the likely trade draw effects of the proposed supermarket on existing foodstore provision within the study area[11]. As part of our analysis we have also considered the cumulative impact of the proposed supermarket alongside other

[10] For the purposes of this assessment the 'Development Plan' includes adopted policy documents published by Cambridge City Council and South Cambridgeshire District Council.
[11] The study area coincides with survey zones 1-4 of the Cambridge Sub-Region Retail Study survey area.

committed/ pipeline proposals for additional convenience goods floorspace at the NIAB site and Orchard Park. The modelling tables which accompany our quantitative analysis are attached in Appendix 2.

Methodology

4.46 In order to carry out our quantitative assessment, we have used a conventional and widely accepted step by step methodology. This draws on the results of the 2008 household telephone survey of shopping patterns commissioned for the Sub-Region Retail Study and enables us to model the existing flows of available expenditure to each store/centre and to assess the impact of the convenience goods floorspace proposed. To summarise, we have:-

- Updated the Sub-Region Retail Study and calculated the total amount of convenience goods expenditure which is currently available within the postcode areas comprising the study area (Zones 1-4);
- Allocated the available expenditure to the main convenience goods stores, drawing on the results of the household survey of shopping patterns, so as to provide estimates of current sales and forecasts of future sales;
- Estimated the turnover required to support the proposal and committed/pipeline developments and the likely pattern of trade draw to the new stores; and
- Assessed the changing shopping patterns likely to arise as a consequence of the new foodstore and the cumulative effects of additional convenience goods floorspace coming forward at the NIAB site and Orchard Road.

Baseline Evidence

i) Survey Area and Household Survey

4.47 In order to provide detailed factual information on shopping patterns across the study area, we have drawn on the results of the 2008 Household Telephone Survey covering 2,000 households, which was commissioned for the Cambridge Sub-Region Retail Study (2008). The survey area comprises 20 Zones (Plan 1), however we have focussed our assessment on Zones 1-4 which broadly comprises the Cambridge Urban Area and outlying areas to the north-west. Plan 2 demonstrates the proximity of the Application Site to other existing convenience stores within the study area.

ii) Estimates of Population in the Survey Area

4.48 Consistent with the 2008 Study we have applied population growth rates from Cambridgeshire County Council to baseline population data derived from Experian which is based on the 2011 census. This takes into account future housing allocations at North West Cambridge and NIAB and subsequent population growth assuming an average household size of 2.2 persons per dwelling.

iii) Available Expenditure in the Survey Area

4.49 The Experian E-Marketer system provides estimates of the per capita expenditure for convenience goods in 2008 prices. We have made deductions for special forms of trading which represents expenditure not available to spend in the shops, (i.e. internet and catalogue shopping). We have applied individual per capita expenditure figures across each survey zone to provide a more detailed understanding of available expenditure in different parts of the catchment area (Table 2, Appendix 2).

4.50 In terms of expenditure growth in the survey area, we have drawn on convenience goods growth rates provided by Experian Business Strategies. Recent turbulence in the market has caused disruption to expenditure growth rates whereby more limited growth is factored in, in the short-term, but a return to more stable levels of growth is expected in the medium to long-term.

4.51 In terms of convenience goods, the per capita expenditure per zone has been applied to the population forecasts, which indicates that total available convenience expenditure within Zones 1-4 is currently £368m. This is forecast to grow to £434m by 2016 and again to £482m by 2021. This equates to an overall growth of £114m between 2010 and 2021 (31%).

iv) Convenience Goods Floorspace

4.52 We have drawn on the information published in the 2008 Study in relation to estimated convenience goods floorspace of existing convenience stores in the study area.

Convenience Goods Shopping Patterns & Trade-draw Assumptions

4.53 The 2008 Study contains information relating to the overall convenience goods market share of in-centre and out-of-centre convenience stores within the study area. The market share information at the baseline position (2010) is contained within Table 4, Appendix 2.

4.54 The first stage of our assessment involves assessing the turnover of the convenience goods floorspace proposed at the Application Site. At this early stage there is no named operator for the proposed retail store. This is not required for this assessment as the trading characteristics and effects of potential operators do not vary significantly. For the purposes of robustness, we have adopted a higher average convenience goods floorspace of £12,000 per sqm net, which is consistent with the approach taken by NLP. Generally however, different store operators' sales density vary and can be as low as c.£9,000 - £10,000 per sqm which, if applied, would substantially reduce the turnover of the proposed store and trading effects.

4.55 Based on a convenience floorspace of 2,000 sqm net and a sales density of £12,000 per sqm, we estimate that the turnover of the proposed retail store at the Application Site would be in the region of £24.4m at the design year (2016) (Table 10, Appendix 2). The design year is the year in which the foodstore is expected to have achieved a full and settled pattern of trading i.e. 2 years after opening (assumes completion in 2014).

4.56 Taking into account our experience elsewhere and the proximity and type of competing stores, we consider that most of the turnover generated by the proposed convenience floorspace will come from existing and future residents as new housing developments come forward in the North West Cambridge area. We anticipate that 50% (£12.2m) and 20% (£4.9m) of trade will come from Zones 1 and 2 respectively. We also expect the proposed convenience floorspace to attract a proportion of trade from Zone 3 (£3.7m) and Zone 4(£3.7m).

4.57 This does not make any allowance for in-flow of trade from beyond Zones 1-4 or take into account a proportion of trade likely to be derived from the new University and office buildings delivered as part of the wider Proposed Development of the Application Site.

4.58 The estimated pattern of trade draw to the retail store is set out in Tables 10 and 11 (Appendix 2), and highlighted below (Table 4.1).

4.1 Trade draw pattern of proposed foodstore at North West Cambridge (2016)

Zone	Trade Draw (£000)	Total available convenience goods expenditure 2016 (£000)	Trade draw as a % of total available convenience goods expenditure 2016
1	£12,181	£137,492	8.9%
2	£4,872	£130,365	3.7%
3	£3,654	£99,166	3.7%
4	£3,654	£66,521	5.5%
Total	£24,362	£433,545	5.6%

Source: GVA, Appendix 2

4.59 When examining the trade diversion as a result of the proposed foodstore (Table 22, Appendix 2) it is apparent that the proposed convenience floorspace will have the majority of impact on existing out-of-centre foodstores (e.g. Asda, Beehive Centre, Tesco, Bar Hill, Tesco, Cheddars Lane and Waitrose, Trumpington). These stores already provide for main-food shopping needs similar to the role anticipated by the proposed foodstore. Whilst it is not possible to identify the exact point location of where individual shopping trips originate within each Zone, given the existing deficit of provision within the North West area it is anticipated that a proportion of existing residents from the area will be travelling a reasonable distance to fulfil their main food shopping needs. It is therefore reasonable to assume that a proportion of the trade currently drawn to these stores, particularly from Zone 1, would be intercepted by the proposed new foodstore.

4.60 We envisage for example an impact of 8.7% (£3m) on the Tesco at Cheddars Lane as we expect the proposed foodstore will attract a proportion of trade currently drawn to the store from Zones 1, 2 and 3. We also anticipate that the proposed foodstore will divert trade from the peripheral survey zones (3 & 4) that is currently being drawn to more the central stores e.g. Asda, Beehive Centre and Sainsbury's Coldhams Lane. We anticipate an impact of 11.9% (£2.2m) on the Asda and 5.6% (£3m) on the Sainsbury's respectively, however given that both these stores are defined as out-of-centre for the purposes of PPS4, they are afforded no protection in policy terms.

4.61 We also anticipate an impact of 8.6% (£4.5m) and 10.6% (£7.7m) on the Waitrose Trumpington store and Tesco, Bar Hill respectively, and 5.8% (£3.6m) on Tesco, Milton; assuming that the proposed convenience floorspace at North West Cambridge will recapture a proportion of expenditure currently attracted to these stores from Zones 1-4.

However, as these stores are all located out-of-centre they have no protection in policy terms.

4.62 In terms of the city centre stores, we estimate a respective impact of 6.1% (£1.1m) and 4.0% (£0.3m) on the Sainsbury's and Marks & Spencer Simply Food located on Sidney Street. We also anticipate an impact of 4.5% (£0.7m) on 'Other' provision in the city centre, however this does not take into account any inflows of expenditure to take account of visitor/tourist spend or lunchtime trade. If this was factored into the turnover of the city centre stores, we would expect the impact on these stores to be negligible.

4.63 In terms of other in-centre stores, we have identified only very modest impact on Histon Road local centre (2.7%) and Cambourne (2.1%) and it is evident that stores within both will continue to trade above or at least in line with company average levels at 2016 as demonstrate by Table 22 in Appendix 2. On the basis of this analysis we consider that impact of the Proposed Development on in-centre trade/turnover will be negligible.

Cumulative Impact

4.64 For the purposes of completeness we have also given consideration to the cumulative effects of other planned convenience goods provision coming forward in local centres at Orchard Park and the NIAB site. For the purposes of this exercise we have assumed that all new provision will have achieved a full and settled pattern of trading at 2016.

4.65 Consistent with the 2008 Study and NLP's analysis we have assumed that the small-scale convenience floorspace approved at Orchard Park will achieve a sales density in the region of £5,000 per sqm. Assuming a larger store could be delivered at the NIAB site we have applied a sales density of £12,000 per sqm, again this is consistent with NLP's analysis. The estimated turnovers of these stores are demonstrated in Table 4.2 below.

4.2 Foodstore provision in North West Cambridge (2016)

Location	Convenience goods floorspace (sqm net)	Sales Density (£ per sqm net)	Estimated turnover at 2016*
Application Site	2,000	£12,000	£24,362
NIAB site	2,000	£12,000	£24,362
Orchard Park	623	£5,000	£3,162
Total	4,623	-	£51,886

Source: GVA, 2010 *assumes 0.3% growth in sales efficiency post-2011

4.66 We consider that most of the turnover generated by the proposed provision at Orchard Park and NIAB will come from existing and future residents as new housing developments come forward in the North West Cambridge area. At the NIAB site, we have assumed that a supermarket catering for main-food shopping would draw 50% (£12.2m) of its trade from Zone 1, 20% (£4.9m) from Zone 2, 20% (£4.9m) from 3, and 10% (£2.4m) from Zone 4 (see Table 12, Appendix 2)

4.67 Reflecting the more local function of small-scale convenience provision approved at Orchard Park, we anticipate that 70% (£2.2m) of trade will come from Zones 1 whilst and just 5% (£0.2m) will come from Zone 2, 15% (£0.5m) will come from Zone 3 and 10% (£0.3m) from Zone 4 (see Table 13, Appendix 2)

4.68 Having regard to the current deficit in main-food shopping provision in the North West Cambridge area and on the basis that like effects like, it is expected that the NIAB store would result in the diversion of trade from the larger foodstores which are currently serving the main food shopping needs of the local resident population. In contrast, it is anticipated that the smaller-scale provision at Orchard Park would generally divert trade from smaller stores within the catchment area which predominantly cater for top-up food shopping needs (e.g. Histon Road Local Centre).

4.69 The full results of our cumulative impact assessment are set out in Table 22, Appendix 2. In summary it is evident that the majority of impact will fall on the large out-of-centre foodstores which have no protection in policy terms. Whilst we do anticipate a degree of impact on certain in-centre stores, it is evident from Table 4.3 below that the majority of these stores will continue to trade at above average levels.

4.70 The main exception to this is the M&S Simply Food in Cambridge City Centre. In our experience it is often the case that the full turnover of M&S Simply Food stores is not captured by a household survey as it does not take into account visitor or workforce spend. Given the role of the City Centre, which annually attracts a significant number of tourist trips (c.4m in 2009 according to ONS data) it is anticipated that the M&S will actually be trading very well and the overall effects of the proposals on this will be negligible.

4.71 We have identified a small deficit between the benchmark turnover of the Morrisons in Cambourne and its estimated turnover at 2016 post-development in North West Cambridge. However, as demonstrated in Table 23, Appendix 2, this will only be a short-

term effect as, given population and expenditure growth, we estimate that the store will again be trading at above its company average level by 2021, if not before.

4.3 Existing foodstore provision in North West Cambridge (2016)

Store / Centre	Location	Benchmark Turnover at 2016 (£000)	Estimated Turnover at 2016 after development (£000)
Sainsbury's, Sidney Street	In-centre	£12,774	£16,011
M&S, Sidney Street	In-centre	£13,196	£6,403
Cambridge City Local Stores	In-centre	£2,526	£13,696
Histon Road Local Centre	In-centre	£7,662	£14,262
Tesco, Cheddars Lane	Out-of-centre	£34,956	£27,734
Asda, Beehive Centre	Out-of-centre	£37,896	£13,872
Sainsbury's, Coldhams Lane	Out-of-centre	£30,275	£47,797
Waitrose, Trumpington	Out-of-centre	£32,270	£43,421
Tesco, Bar Hill	Out-of-centre	£52,715	£60,715
Tesco, Milton	Out-of-centre	£29,346	£52,323
Morrisons, Cambourne	In-centre	£31,585	£30,746
Tesco, Yarrow Road	Out-of-centre	£32,144	£43,746

Source: GVA, 2010

4.72 As demonstrated by Table 23, Appendix 2, any impact on existing stores / centres will be offset by growth in population and expenditure over the longer term so that by 2021, all existing foodstores in policy protected centres (with the exception of the M&S Simply Food for the reasons discussed above) will achieve a turnover in excess of their respective company average benchmark. The long-term impact of the proposals will therefore be negligible.

Other Retail Provision

4.73 The Proposed Development includes other Class A floorspace (A1-A5 uses) alongside the proposed supermarket, which together will form the local centre envisaged by the AAP and consistent with the definition set out in PPS4 As indicated in Appendix 1, the additional floorspace in the local centre will comprise c.790 sqm net local shop units (A1-A5 uses) and a c.185 sqm net local pub (A4 use).

4.74 Based on the definition in PPS4 and our experience elsewhere, the local nature of the facilities and their location within the local centre, we have assumed that at least 50% (c.395 sqm net) of the proposed floorspace will come forward as A1 uses e.g. newsagents, hair salon, pharmacy, laundrette etc. Whilst the remainder would comprise a mix of A2-A5 uses e.g. a hot-food takeaway, estate agent or café.

4.75 Based on the small-scale, local nature of the facilities and the proximity of the proposed foodstore, we would consider it reasonable to assume that only a small proportion of any Class A1 floorspace would actually likely to be convenience or comparison retail floorspace. In our experience, it is more likely that any A1 uses will be service-orientated e.g. laundrettes and hair salons.

4.76 If we assume that 20% of the proposed local shop floorspace (158 sqm net) was used for the sale of convenience goods (e.g. newsagents), based on a sales density of £2,500 per sqm[12], this would equate to a potential convenience goods turnover in the region of £0.4m – [11%] of the total estimated convenience goods expenditure generated by the new residents alone in 2016 (£3.5m).

4.77 It is not practicable to realistically estimate the turnover of small-scale comparison or service uses which could typically occupy the local centre shops as there is no industry published data for such uses. However, given the small-scale nature of the proposed provision it is likely that even the combined turnover of the retail uses will be minimal.

4.78 It is, nevertheless, evident that the other retail uses proposed will play a key role in forming the local centre envisaged by the AAP. The shops will be small in scale, complementary in nature to the anchor supermarket, integral to the local centre function and in all likelihood predominantly service-orientated. Such provision would not generate a significant turnover or draw any trade from beyond the immediate catchment and would primarily serve the new local residents. Such provision would not, therefore, result in adverse impacts on existing centres in the wider area.

4.79 Beyond the local centre the Proposed Development includes c.225 sqm net of retail floorspace intended to comprise individual local shops serving localised, walk-in

[12] GVA assumption based on experience elsewhere and small-scale, local nature of facilities.

catchments. The nature of these shops is therefore such that they would not result in any adverse impacts on existing centres in the wider area.

e) Appropriateness of scale relative to local centre role

4.80 The Applicant's proposals for a foodstore comprising 2,000 sqm net for the predominant sale of convenience is consistent with the definition of a supermarket in PPS4 (Annex B) and therefore in accordance with PPS4's definition of a Local Centre:

> *'small grouping usually comprising a newsagent, a small supermarket, a sub-post office and occasionally a pharmacy a hairdresser and other small shops of a local nature'*

4.81 The Applicant's proposal for a foodstore comprising 2,000 sqm net floorspace predominantly for the sale of convenience goods is therefore an appropriate scale for the new local centre. A store of this scale is also sufficient to accommodate a main food format which will contribute towards effectively meeting both existing and future main food shopping needs of the new resident, student and workforce population on the Proposed Development.

4.82 The Applicant's proposals for a local pub comprising c.185 sqm net and an additional 790 sqm net retail uses (A1-A5 use) would provide small-scale shop units capable of accommodating a variety of other local centre uses e.g. a pharmacy, laundrette, hot food take away etc, consistent with PPS4's definition of a local centre.

4.83 The scale of the retail floorspace proposed both within and outside the local centre is therefore considered sustainable, appropriate, in accordance with Policy NW21 of the AAP and in accordance with PPS4.

f) Any locally important impacts

4.84 There are no local important impacts identified within the Development Plan.

5. Conclusions

5.1 In accordance with national and local policy we consider that the Applicant's proposals for a 2,000 sqm net foodstore combined with other proposed Class A uses are of an appropriate scale for the new local centre and to contribute towards meeting both existing and future shopping needs of local residents in on the Application Site, to provide facilities and services for nearby communities and to provide the right level of facilities in a sustainable manner to residents within the Proposed Development. They will help form the local centre envisaged by the AAP as well as provide new residents with sustainable access to key local facilities.

5.2 Both the Councils' retail evidence base and our own assessment demonstrate there is a clear deficiency in main food store provision in the North West Cambridge area which is resulting in high levels of trade leakage and unsustainable travel patterns as existing residents travel further afield to fulfil their main food shopping needs. Given the significant level of housing and population growth planned for the area, the Councils' retail evidence recognises that 'there is a clear need for easily accessible large foodstore provision to serve the main food shopping needs of existing and new residents, to increase choice and competition'.

5.3 On the basis that the proposals will be in-centre in accordance with the Development Plan (AAP), under the provision of PPS4 and the Draft NPPF it is not a requirement to provide sequential site assessment. Furthermore, there is a clear site-specific need for the proposed supermarket and other uses to be located at the new local centre in the heart of the Application Site to serve existing and new residents, to provide accessible convenience shopping provision for the academic and commercial research buildings and, as per the AAP vision for the Proposed Development, to provide facilities and services for nearby communities.

5.4 It is also reinforced in policy that the supermarket, as a vital component of the local centre, should be delivered in the early stages of the Proposed Development to ensure that it is able to meet the AAP aspiration that it establish itself as the focus of the community and contributes towards developing a sustainable neighbourhood from the outset.

5.5 Whilst the proposed supermarket is in conformity with the AAP, PPS4 and the Draft NPPF (falling below the 2,500 sqm threshold and located 'in-centre'), we have considered the Proposed Development against the relevant requirements of EC16 of PPS4. We have undertaken a detailed assessment of trade draw resulting from the proposed store and also considered the cumulative effects of other foodstore provision proposed at Orchard Park and the NIAB site.

5.6 Overall, we anticipate that a number of stores will continue to trade at above company average levels. Whilst certain other stores such as M&S, Sidney Street, Morrisons, Cambourne, Asda, Beehive Centre and Tesco Cheddars Lane are likely to trade below company average at 2016, we anticipate that each will continue to trade viably and the impact on town centre vitality and viability will be negligible. Furthermore, the anticipated impact on the Asda and Tesco stores should not be a reason for refusal as both stores are located out-of-centre and therefore not afforded protection under the provisions of PPS4.

5.7 The Proposed Development includes other Class A floorspace (A1-A5 uses) alongside the proposed supermarket, which together will form the local centre envisaged by the AAP and will be consistent with the definition in PPS4. The foodstore alone will not conform to the definition of a local centre as set out within PPS4.

5.8 The provision of local shops will be small in scale and integral to the local centre. Such shops would not generate a significant turnover or draw trade from beyond the immediate catchment and would primarily serve the new local residents. Such provision would not therefore result in adverse impacts on existing centres in the wider area.

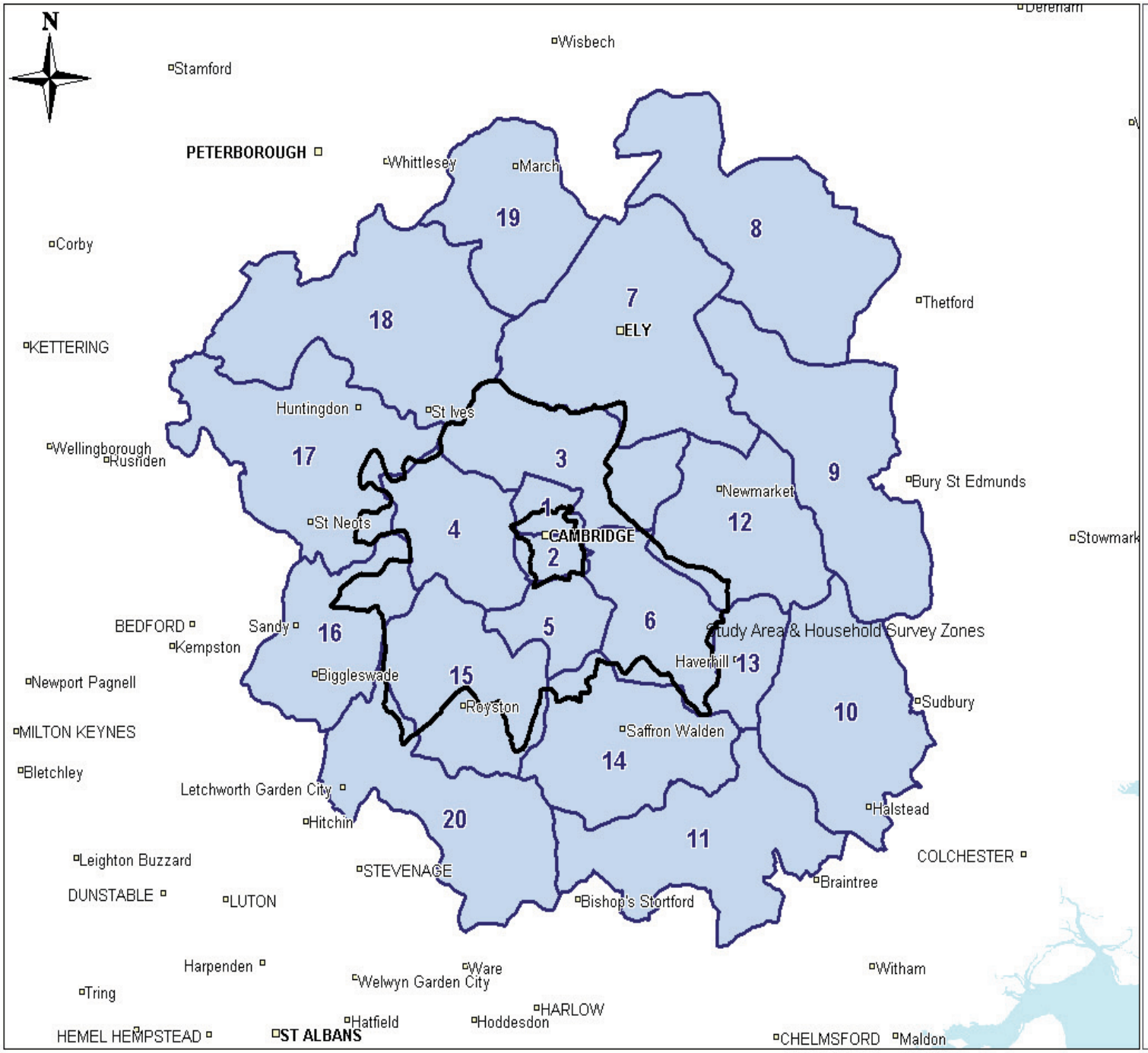
5.9 Beyond the local centre the Proposed Development includes c.225 sqm net of retail floorspace which is intended to comprise small, individual local shops serving localised, walk-in catchments. Such provision will ensure adequate and sustainable access to local shopping facilities in accordance with PPS4 and the Draft NPPF.

5.10 The Applicant's proposals will be developed in accordance with the Development Plan and in all material respects within the Local Centre. They will have a negligible impact on town centre vitality and viability and in-centre trade/turnover; and will have no impact on existing, committed or proposed development. We therefore conclude that the Proposed Development is in conformity not only with the adopted Development Plan but also the relevant development management policies of PPS4 and the Draft NPPF.

Plans

Plan 1

Household Survey Area



GVA

Study Area & Household Survey Zones

KEY

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

Zone	Postal Sectors
1	CB3 0, CB4 0/1/2/3/6/9, CB5 8
2	CB1 1/2/3/7/8/9, CB2 1/2/3, CB3 9
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

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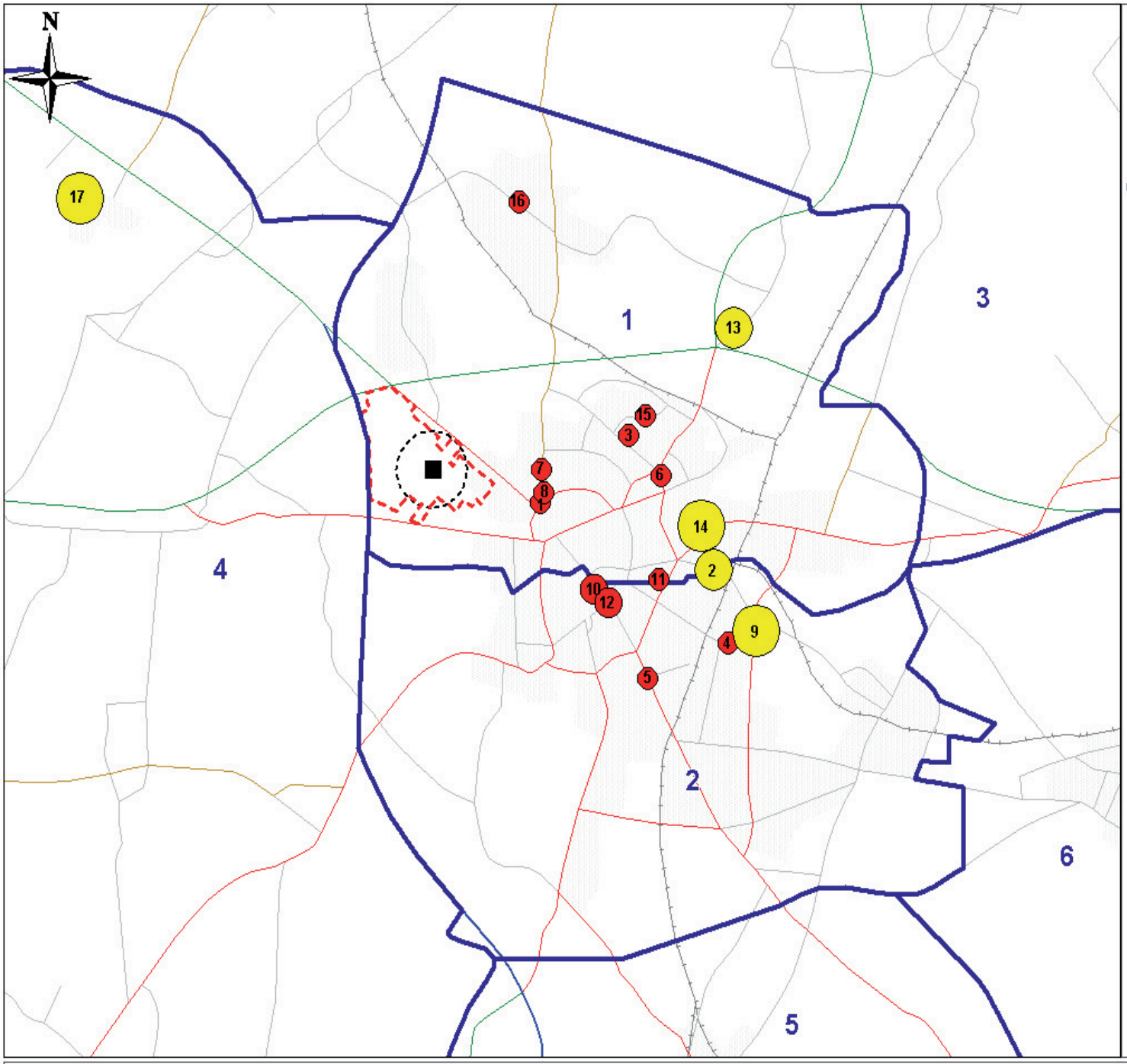
Plan 2 Existing Foodstore Provision



GVA

Cambridge AAP Boundary with proposed local centre & existing foodstores

KEY

- Survey Zones
- NW Cambridge AAP Boundary
- Location of Local Centre
- 500m radius

Foodstores

- In centre store
- Out of centre store

Ref	Store
1	Aldi, Histon Rd
2	Asda, Beehive Centre, Coldhams Lane
3	Budgens Arbury Road
4	Co-Op, 177-189 Mill Rd
5	Co-Op, 52 Hills Rd
6	Co-Op, 129 Milton Rd
7	Co-Op, Histon Rd
8	Iceland, Unit 2, Histon Rd
9	J Sainsbury, Brooks Rd, Coldams Lane
10	J Sainsbury, 44 Sidney St
11	Marks & Spencer, 44 Grafton Centre
12	Marks & Spencer, 6-11 Sidney Street
13	Tesco, Cambridge Rd Ind.Est, Milton
14	Tesco, Cheddars Lane, Newmarket Rd
15	Tesco Express, 82-84 Campkin Rd
16	Tesco Express, 30 High St, Histon
17	Tesco Extra, 15-18 Viking Way, Bar Hill

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Appendices

Appendix 1 Indicative Floorspace Schedule

North West Cambridge
Indicative Retail Floorspace Schedule

Retail Use	Location	Sqm Gross	Sqm Net
Foodstore (A1)	Proposed Local Centre	2,900	2,000
Local Centre Shops (A1-A5)	Proposed Local Centre	1,050	790
Local Centre Pub (A4)	Proposed Local Centre	250	185
	Sub-Total	***4,200***	***2,975***
Small Local Shops (A1-A5)	Beyond Local Centre	300	225
University-run Cafeteria (A3)	Beyond Local Centre	800	600
	TOTAL	**5,300**	**3,800**

NB: All figures are approximate and have been rounded. Assumes net:gross ratio of 70% for foodstore and 75% for all other uses.

Appendix 2 Impact Modelling Tables

Cambridge University: North West Cambridge Impact Assessment 2011

Table 1
Survey area population forecasts

Catchment Zone	Postcode Sector Groupings	2010	2016	2021
1	CB3 0, CB4 0/1/2/3, CB 5 8, CB24 6/9	71,900	**80,528**	**84,523**
2	CB1 1/2/3/7/8/9, CB2 0/1/3/7/8/9, CB3 9	73,975	**86,551**	**89,147**
3	CB24 3/4/5/8, CB25 0/9	40,900	**52,352**	**64,916**
4	CB23 1/2/3/4/5/6/7/8	32,800	**34,768**	**33,725**
Total		**219,575**	**254,199**	**272,312**

Table 1a
Population growth rates

2010-2016 (%)	2016-2021 (%)
12.0	5.0
17.0	3.0
28.0	24.0
6.0	-3.0
15.8	**7.1**

Source: Experian, August 2010 and Cambridgeshire County Council Mid 2007 population estimates by ward transposed into zones and growth rates used in BOLD

Note a) Includes shortfall not accounted for by CCC estimates (1,450 additional dwellings at University site - Zone 1) between 2016 and 2021

Cambridge University: North West Cambridge Impact Assessment 2011

Table 2
Convenience goods expenditure forecasts per capita (2008 prices)

Growth in convenience goods per captia retail expenditure::
2008 - 2009 -2.9% pa
2009 - 2010 0.3% pa
2010 - 2011 0.0% pa
2011 - 2016 0.6% pa
2016 - 2021 0.7% pa

Zone	2008	2008 Minus SFT at 3.0%	2010	2010 Minus SFT at 3.8%	2016	2016 Minus SFT at 5.0%	2021	2021 Minus SFT at 5.2%
1	1,791	1,737	1,744	1,678	1,797	1,707	1,861	1,764
2	1,580	1,533	1,539	1,480	1,586	1,506	1,642	1,556
3	1,987	1,927	1,935	1,862	1,994	1,894	2,065	1,957
4	2,007	1,947	1,955	1,880	2,014	1,913	2,085	1,977

Source: Experian Business Strategies August 2010

Cambridge University: North West Cambridge Impact Assessment 2011

Table 3

Survey area retail expenditure forecasts (2008 prices)

Zone	Convenience goods		
	2010 (£000)	2016 (£000)	2021 (£000)
1	120,648	137,492	149,121
2	109,506	130,365	138,749
3	76,141	99,166	127,063
4	61,676	66,521	66,675
Total	**367,970**	**433,545**	**481,608**

Source: Tables 1 & 2

Cambridge University: North West Cambridge
Impact Assessment 2011

Table 4

2010 Convenience Goods Allocation - % Market share

Catchment Zone	Sainsbury's Sidney Street 2010 (%)	M&S Sidney Street 2010 (%)	Cambridge City local stores 2010 (%)	Histon Road Local Centre 2010 (%)	Tesco Cheddars Lane 2010 (%)	Asda Beehive Centre 2010 (%)	Sainsbury's Coldham's Lane 2010 (%)	Waitrose Trumpington 2010 (%)	Tesco Bar Hill 2010 (%)	Tesco Milton 2010 (%)	Morrisons Cambourne 2010 (%)	Tesco Yarrow Road 2010 (%)	Sub-total 2010 (%)	Other 2010 (%)	Total 2010 (%)
1	6.2	1.7	2.1	4.5	9.3	2.2	9.0	3.4	12.6	28.7	0.8	0.1	80.3	19.7	100
2	4.4	2.1	4.7	1.1	6.5	4.0	21.0	14.3	1.5	1.8	0.0	13.8	75.1	24.9	100
3	1.1	1.1	1.7	1.8	4.5	1.1	7.4	0.3	13.4	16.7	3.1	5.1	57.0	43.0	100
4	0.0	1.4	1.7	1.8	0.8	1.5	1.8	8.3	45.2	1.8	18.1	0.0	82.2	17.9	100

SOURCE: Cambridge Sub Region Retail Study (Household Survey, March 2008)

Table 5

2010 Convenience Goods Allocation - spend (£) 2008 prices (2010)

Catchment Zone	Sainsbury's Sidney Street 2010 (£000)	M&S Sidney Street 2010 (£000)	Cambridge City local stores 2010 (£000)	Histon Road Local Centre 2010 (£000)	Tesco Cheddars Lane 2010 (£000)	Asda Beehive Centre 2010 (£000)	Sainsbury's Coldham's Lane 2010 (£000)	Waitrose Trumpington 2010 (£000)	Tesco Bar Hill 2010 (£000)	Tesco Milton 2010 (£000)	Morrisons Cambourne 2010 (£000)	Tesco Yarrow Road 2010 (£000)	Sub-total 2010 (£000)	Other 2010 (£000)	Total 2010 (£000)
1	7,450	2,021	2,564	5,399	11,160	2,624	10,798	4,072	15,141	34,656	905	145	96,935	23,713	120,648
2	4,846	2,300	5,174	1,150	7,063	4,325	23,024	15,632	1,643	1,971	0	15,090	82,217	27,289	109,506
3	799	799	1,256	1,371	3,426	799	5,596	228	10,222	12,677	2,341	3,883	43,400	32,740	76,141
4	0	833	1,033	1,110	463	925	1,110	5,088	27,847	1,110	11,148	0	50,667	11,009	61,676
Sub-total	**13,095**	**5,953**	**10,027**	**9,030**	**22,112**	**8,674**	**40,528**	**25,021**	**54,853**	**50,415**	**14,394**	**19,118**	**273,219**	**94,752**	**367,970**
Estimated turnover from Zones 5-20	2,619	0	2,808	4,605	6,634	7,026	4,863	20,016	8,776	2,521	13,674	20,074	**93,616**	-	**93,616**
Total	**15,714**	**5,953**	**12,835**	**13,635**	**28,746**	**15,700**	**45,391**	**45,037**	**63,629**	**52,936**	**28,069**	**39,192**	**366,835**	**94,752**	**461,587**

Source: Tables 3 & 4

Cambridge University: North West Cambridge
Impact Assessment 2011

Table 6

2016 Convenience goods allocation - % market share

Catchment Zone	Sainsbury's Sidney Street 2015 (%)	M&S Sidney Street 2015 (%)	Cambridge City local stores 2015 (%)	Histon Road Local Centre 2015 (%)	Tesco Cheddars Lane 2015 (%)	Asda Beehive Centre 2015 (%)	Sainsbury's Coldham's Lane 2015 (%)	Waitrose Trumpington 2015 (%)	Tesco Bar Hill 2015 (%)	Tesco Milton 2015 (%)	Morrisons Cambourne 2015 (%)	Tesco Yarrow Road 2015 (%)	Sub-total 2015 (%)	Other 2015 (%)	Total 2015 (%)
1	6.2	1.7	2.1	4.5	9.3	2.2	9.0	3.4	12.6	28.7	0.8	0.1	80.3	19.7	100
2	4.4	2.1	4.7	1.1	6.5	4.0	21.0	14.3	1.5	1.8	0.0	13.8	75.1	24.9	100
3	1.1	1.1	1.7	1.8	4.5	1.1	7.4	0.3	13.4	16.7	3.1	5.1	57.0	43.0	100
4	0.0	1.4	1.7	1.8	0.8	1.5	1.8	8.3	45.2	1.8	18.1	0.0	82.2	17.9	100

Source: Cambridge Sub Region Retail Study (Household Survey, March 2008)

Table 7

2016 Convenience goods allocation - Spend (£) 2008 prices

Catchment Zone	Sainsbury's Sidney Street 2015 (£000)	M&S Sidney Street 2015 (£000)	Cambridge City local stores 2015 (£000)	Histon Road Local Centre 2015 (£000)	Tesco Cheddars Lane 2015 (£000)	Asda Beehive Centre 2015 (£000)	Sainsbury's Coldham's Lane 2015 (£000)	Waitrose Trumpington 2015 (£000)	Tesco Bar Hill 2015 (£000)	Tesco Milton 2015 (£000)	Morrisons Cambourne 2015 (£000)	Tesco Yarrow Road 2015 (£000)	Sub-total 2015 (£000)	Other 2015 (£000)	Total 2015 (£000)
1	8,490	2,303	2,922	6,153	12,718	2,990	12,305	4,640	17,255	39,494	1,031	165	110,468	27,024	137,492
2	5,769	2,738	6,160	1,369	8,409	5,149	27,409	18,610	1,955	2,347	0	17,964	97,878	32,487	130,365
3	1,041	1,041	1,636	1,785	4,462	1,041	7,289	297	13,313	16,511	3,049	5,057	56,525	42,642	99,166
4	0	898	1,114	1,197	499	998	1,197	5,488	30,034	1,197	12,024	0	54,647	11,874	66,521
Sub-total	**15,300**	**6,980**	**11,832**	**10,504**	**26,088**	**10,179**	**48,201**	**29,035**	**62,558**	**59,550**	**16,104**	**23,187**	**319,518**	**114,027**	**433,545**
Estimated turnover from Zones 5-20	3,060	0	3,313	5,357	7,826	8,245	5,784	23,228	10,009	2,977	15,299	24,346	**109,446**	-	**109,446**
Total	**18,360**	**6,980**	**15,145**	**15,861**	**33,914**	**18,424**	**53,985**	**52,264**	**72,567**	**62,527**	**31,403**	**47,533**	**428,964**	**114,027**	**542,990**

Source: Tables 3 & 4

Cambridge University: North West Cambridge
Impact Assessment 2011

Table 8

2021 Convenience goods allocation - % market share

Catchment Zone	Sainsbury's Sidney Street 2020 (%)	M&S Sidney Street 2020 (%)	Cambridge City local stores 2020 (%)	Histon Road Local Centre 2020 (%)	Tesco Cheddars Lane 2020 (%)	Asda Beehive Centre 2020 (%)	Sainsbury's Coldham's Lane 2020 (%)	Waitrose Trumpington 2020 (%)	Tesco Bar Hill 2020 (%)	Tesco Milton 2020 (%)	Morrisons Cambourne 2020 (%)	Tesco Yarrow Road 2020 (%)	Sub-total 2020 (%)	Other 2020 (%)	Total 2020 (%)
1	6.2	1.7	2.1	4.5	9.3	2.2	9.0	3.4	12.6	28.7	0.8	0.1	80.3	19.7	100
2	4.4	2.1	4.7	1.1	6.5	4.0	21.0	14.3	1.5	1.8	0.0	13.8	75.1	24.9	100
3	1.1	1.1	1.7	1.8	4.5	1.1	7.4	0.3	13.4	16.7	3.1	5.1	57.0	43.0	100
4	0.0	1.4	1.7	1.8	0.8	1.5	1.8	8.3	45.2	1.8	18.1	0.0	82.2	17.9	100

Source: Cambridge Sub Region Retail Study (Household Survey, March 2008)

Table 9

2021 Convenience goods allocation - spend (£) 2008 prices

Catchment Zone	Sainsbury's Sidney Street 2020 (£000)	M&S Sidney Street 2020 (£000)	Cambridge City local stores 2020 (£000)	Histon Road Local Centre 2020 (£000)	Tesco Cheddars Lane 2020 (£000)	Asda Beehive Centre 2020 (£000)	Sainsbury's Coldham's Lane 2020 (£000)	Waitrose Trumpington 2020 (£000)	Tesco Bar Hill 2020 (£000)	Tesco Milton 2020 (£000)	Morrisons Cambourne 2020 (£000)	Tesco Yarrow Road 2020 (£000)	Sub-total 2020 (£000)	Other 2020 (£000)	Total 2020 (£000)
1	9,208	2,498	3,169	6,673	13,794	3,243	13,346	5,033	18,715	42,835	1,118	179	119,811	29,310	149,121
2	6,140	2,914	6,556	1,457	8,949	5,481	29,172	19,806	2,081	2,497	0	19,120	104,173	34,576	138,749
3	1,334	1,334	2,097	2,287	5,718	1,334	9,339	381	17,058	21,156	3,907	6,480	72,426	54,637	127,063
4	0	900	1,117	1,200	500	1,000	1,200	5,501	30,104	1,200	12,052	0	54,774	11,902	66,675
Sub-total	**16,682**	**7,646**	**12,938**	**11,617**	**28,961**	**11,058**	**53,058**	**30,721**	**67,958**	**67,689**	**17,077**	**25,779**	**351,183**	**130,425**	**481,608**
Estimated turnover from Zones 5-20	3,336	0	3,623	5,925	8,688	8,957	6,367	24,577	10,873	3,384	16,223	27,068	**119,022**	-	**119,022**
Total	**20,018**	**7,646**	**16,561**	**17,542**	**37,649**	**20,015**	**59,425**	**55,298**	**78,831**	**71,073**	**33,300**	**52,847**	**470,205**	**130,425**	**600,630**

Source: Tables 3 & 4

Cambridge University: North West Cambridge Impact Assessment 2011

Table 10

New stores convenience goods turnover

	Net Convenience (sqm)	Company Average Sales (£ per sq m net)	Average Turnover 2010 (£000s)	Average Turnover 2016 (£000s)
New Foodstore at University Site	2,000	12,000	24,000	24,362
New foodstore at NIAB Site	2,000	12,000	24,000	24,362
Orchard Park	623	5,000	3,115	3,162

Source: GVA, 2011

Growth in sales per sqm - 0.3% pa (2010-2016)

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Table 11

University store trade draw (2016)

	Zone 1	Zone 2	Zone 3	Zone 4	Total
Draw from zones (%)	50	20	15	15	100.0
Draw from zones (£m)	12,181	4,872	3,654	3,654	24,362
Market share uplift (%)	8.9	3.7	3.7	5.5	-

Table 12

NIAB store trade draw (2016)

	Zone 1	Zone 2	Zone 3	Zone 4	Total
Draw from zones (%)	50	20	20	10	100.0
Draw from zones (£m)	12,181	4,872	4,872	2,436	24,362
Market share uplift (%)	8.9	3.7	4.9	3.7	-

Table 13

Orchard Park store trade draw (2016)

	Zone 1	Zone 2	Zone 3	Zone 4	Total
Draw from zones (%)	70	5	15	10	100.0
Draw from zones (£m)	2,213	158	474	316	3,162
Market share uplift (%)	1.6	0.1	0.5	0.5	-

Cambridge University: North West Cambridge
Impact Assessment 2011

Table 14

2016 Convenience goods allocation - % market share: with new store at University site

Catchment Zone	Sainsbury's Sidney Street	M&S Sidney Street	Cambridge City local stores	Histon Road Local Centre	Tesco Cheddars Lane	Asda Beehive Centre	Sainsbury's Coldham's Lane	Waitrose Trumpington	Tesco Bar Hill	Tesco Milton	Morrisons Cambourne	Tesco Yarrow Road	Sub-total	Other	Cambridge Uni store	Total
	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	6.0	1.6	2.1	4.4	8.3	1.8	8.0	2.4	10.1	26.9	0.7	0.1	72.2	19.4	8.9	100
2	4.1	2.0	4.5	1.0	6.3	3.8	20.9	13.7	0.6	1.4	0.0	13.7	71.9	24.4	3.7	100
3	0.9	1.0	1.6	1.8	3.8	0.9	6.6	0.3	12.9	16.6	3.1	4.5	53.7	42.6	3.7	100
4	0.0	1.3	1.5	1.8	0.7	1.0	1.3	7.8	42.9	1.3	17.8	0.0	77.3	17.4	5.5	100

Source: Cambridge Sub Region Retail Study (Household Survey, March 2008)

Table 15

2016 Convenience goods allocation - spend (£) 2008 prices: with new store at University site

Catchment Zone	Sainsbury's Sidney Street	M&S Sidney Street	Cambridge City local stores	Histon Road Local Centre	Tesco Cheddars Lane	Asda Beehive Centre	Sainsbury's Coldham's Lane	Waitrose Trumpington	Tesco Bar Hill	Tesco Milton	Morrisons Cambourne	Tesco Yarrow Road	Sub-total	Other	Cambridge Uni store	TOTAL
	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	8,215	2,234	2,853	6,084	11,343	2,509	10,931	3,265	13,818	37,020	894	165	99,331	26,673	12,181	137,492
2	5,312	2,607	5,899	1,238	8,213	4,954	27,214	17,827	782	1,825	0	17,834	93,706	31,809	4,872	130,365
3	843	992	1,537	1,735	3,768	843	6,495	297	12,817	16,412	3,049	4,462	53,252	42,245	3,654	99,166
4	0	865	1,014	1,164	486	665	865	5,155	28,538	865	11,824	0	51,441	11,575	3,654	66,521
Sub-total	**14,370**	**6,698**	**11,304**	**10,222**	**23,810**	**8,971**	**45,504**	**26,546**	**55,955**	**56,122**	**15,767**	**22,461**	**297,731**	**112,302**	**24,362**	**433,545**
Estimated turnover from Zones 5-20	2,874	0	3,165	5,213	7,143	7,267	5,461	21,237	8,953	2,806	14,979	23,585	**102,681**	-	-	**102,681**
Total	**17,245**	**6,698**	**14,468**	**15,435**	**30,953**	**16,238**	**50,965**	**47,782**	**64,908**	**58,928**	**30,746**	**46,046**	**400,412**	**112,302**	**24,362**	**536,226**

Source: Tables 3 & 4

Cambridge University: North West Cambridge
Impact Assessment 2011

Table 16

2016 Convenience goods allocation - % market share: with new store at University and NIAB sites

Catchment Zone	Sainsbury's Sidney Street	M&S Sidney Street	Cambridge City local stores	Histon Road Local Centre	Tesco Cheddars Lane	Asda Beehive Centre	Sainsbury's Coldham's Lane	Waitrose Trumpington	Tesco Bar Hill	Tesco Milton	Morrisons Cambourne	Tesco Yarrow Road	Sub-total	Other	Cambridge Uni store	NIAB store	Total
	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	5.8	1.6	2.0	4.4	7.3	1.5	7.0	1.4	8.6	24.0	0.7	0.1	64.1	19.1	8.9	8.9	100
2	3.7	1.9	4.3	0.9	6.2	3.7	20.7	13.1	0.2	0.5	0.0	13.6	68.7	23.9	3.7	3.7	100
3	0.7	1.0	1.5	1.7	2.9	0.6	5.6	0.3	12.5	16.1	3.1	3.5	49.2	42.2	3.7	4.9	100
4	0.0	1.3	1.4	1.7	0.7	0.5	0.9	7.4	42.1	0.5	17.8	0.0	74.2	16.9	5.5	3.7	100

Source: Cambridge Sub Region Retail Study (Household Survey, March 2008)

Table 17

2016 Convenience goods allocation - spend (£) 2008 prices: with new store at University and NIAB sites

Catchment Zone	Sainsbury's Sidney Street	M&S Sidney Street	Cambridge City local stores	Histon Road Local Centre	Tesco Cheddars Lane	Asda Beehive Centre	Sainsbury's Coldham's Lane	Waitrose Trumpington	Tesco Bar Hill	Tesco Milton	Morrisons Cambourne	Tesco Yarrow Road	Sub-total	Other	Cambridge Uni store	NIAB store	TOTAL
	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	7,940	2,165	2,784	6,015	9,968	2,028	9,556	1,891	11,756	33,032	894	165	88,194	26,261	12,181	12,181	137,492
2	4,856	2,477	5,638	1,108	8,017	4,758	27,018	17,045	261	652	0	17,704	89,535	31,157	4,872	4,872	130,365
3	645	942	1,438	1,686	2,876	545	5,504	297	12,421	15,916	3,049	3,471	48,790	41,848	3,654	4,872	99,166
4	0	832	948	1,131	472	333	599	4,889	28,005	333	11,824	0	49,365	11,242	3,654	2,436	66,521
Sub-total	**13,441**	**6,416**	**10,808**	**9,940**	**21,334**	**7,664**	**42,676**	**24,123**	**52,442**	**49,933**	**15,767**	**21,339**	**275,884**	**110,509**	**24,362**	**24,362**	**433,545**
Estimated turnover from Zones 5-20	2,688	0	3,026	5,069	6,400	6,208	5,121	19,298	8,391	2,497	14,979	22,406	**96,084**	-	-	-	**96,084**
Total	**16,129**	**6,416**	**13,835**	**15,009**	**27,734**	**13,872**	**47,797**	**43,421**	**60,833**	**52,430**	**30,746**	**43,746**	**371,968**	**110,509**	**24,362**	**24,362**	**529,629**

Source: Tables 3 & 4

Cambridge University: North West Cambridge
Impact Assessment 2011

Table 18

2016 Convenience goods allocation - % market share: with new stores at University, NIAB and Orchard Park

Catchment Zone	Sainsbury's Sidney Street	M&S Sidney Street	Cambridge City local stores	Histon Road Local Centre	Tesco Cheddars Lane	Asda Beehive Centre	Sainsbury's Coldham's Lane	Waitrose Trumpington	Tesco Bar Hill	Tesco Milton	Morrisons Cambourne	Tesco Yarrow Road	Sub-total	Other	Cambridge Uni store	NIAB store	Orcahrd Park store	Total
	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	5.7	1.6	2.0	4.1	7.3	1.5	7.0	1.4	8.5	24.0	0.7	0.1	63.6	18.1	8.9	8.9	1.6	100
2	3.7	1.9	4.3	0.9	6.2	3.7	20.7	13.1	0.2	0.5	0.0	13.6	68.7	23.8	3.7	3.7	0.1	100
3	0.6	1.0	1.4	1.7	2.9	0.6	5.6	0.3	12.5	16.1	3.1	3.5	49.1	41.8	3.7	4.9	0.5	100
4	0.0	1.2	1.4	1.7	0.7	0.5	0.9	7.4	42.1	0.5	17.8	0.0	74.0	16.6	5.5	3.7	0.5	100

Source: Cambridge Sub Region Retail Study (Household Survey, March 2008)

Table 19

2016 Convenience goods allocation - spend (£) 2008 prices: with new stores at University, NIAB and Orchard Park

Catchment Zone	Sainsbury's Sidney Street	M&S Sidney Street	Cambridge City local stores	Histon Road Local Centre	Tesco Cheddars Lane	Asda Beehive Centre	Sainsbury's Coldham's Lane	Waitrose Trumpington	Tesco Bar Hill	Tesco Milton	Morrisons Cambourne	Tesco Yarrow Road	Sub-total	Other	Cambridge Uni store	NIAB store	Orcahrd Park store	TOTAL
	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015	2015
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	7,871	2,165	2,715	5,603	9,968	2,028	9,556	1,891	11,687	32,964	894	165	87,507	24,886	12,181	12,181	2,213	137,492
2	4,856	2,477	5,638	1,108	8,017	4,758	27,018	17,045	261	652	0	17,704	89,535	31,027	4,872	4,872	158	130,365
3	615	942	1,418	1,636	2,876	545	5,504	297	12,421	15,916	3,049	3,471	48,691	41,452	3,654	4,872	474	99,166
4	0	818	928	1,098	472	333	599	4,889	27,972	299	11,824	0	49,232	11,043	3,654	2,436	316	66,521
Sub-total	**13,342**	**6,403**	**10,700**	**9,445**	**21,334**	**7,664**	**42,676**	**24,123**	**52,340**	**49,831**	**15,767**	**21,339**	**274,964**	**108,407**	**24,362**	**24,362**	**3,162**	**433,545**
Estimated turnover from Zones 5-20	2,668	0	2,996	4,817	6,400	6,208	5,121	19,298	8,374	2,492	14,979	22,406	**95,760**	-	-	-	-	**95,760**
Total	**16,011**	**6,403**	**13,696**	**14,262**	**27,734**	**13,872**	**47,797**	**43,421**	**60,715**	**52,323**	**30,746**	**43,746**	**370,724**	**108,407**	**24,362**	**24,362**	**3,162**	**529,304**

Source: Tables 3 & 4

Cambridge University: North West Cambridge
Impact Assessment 2011

Table 20

2021 Convenience goods allocation - % market share: with new stores at University, NIAB and Orchard Park

Catchment Zone	Sainsbury's Sidney Street 2015 (%)	M&S Sidney Street 2015 (%)	Cambridge City local stores 2015 (%)	Histon Road Local Centre 2015 (%)	Tesco Cheddars Lane 2015 (%)	Asda Beehive Centre 2015 (%)	Sainsbury's Coldham's Lane 2015 (%)	Waitrose Trumpington 2015 (%)	Tesco Bar Hill 2015 (%)	Tesco Milton 2015 (%)	Morrisons Cambourne 2015 (%)	Tesco Yarrow Road 2015 (%)	Sub-total 2015 (%)	Other 2015 (%)	CAMBRIDGE UNI STORE 2015 (%)	NIAB STORE 2015 (%)	ORCHARD PARK STORE 2015 (%)	TOTAL 2015 (%)
1	5.7	1.6	2.0	4.1	7.3	1.5	7.0	1.4	8.5	24.0	0.7	0.1	63.6	18.1	8.9	8.9	1.6	100
2	3.7	1.9	4.3	0.9	6.2	3.7	20.7	13.1	0.2	0.5	0.0	13.6	68.7	23.8	3.7	3.7	0.1	100
3	0.6	1.0	1.4	1.7	2.9	0.6	5.6	0.3	12.5	16.1	3.1	3.5	49.1	41.8	3.7	4.9	0.5	100
4	0.0	1.2	1.4	1.7	0.7	0.5	0.9	7.4	42.1	0.5	17.8	0.0	74.0	16.6	5.5	3.7	0.5	100

Source: Cambridge Sub Region Retail Study (Household Survey, March 2008)

Table 21

2021 Convenience goods allocation - spend ($) 2008 prices: with new stores at University, NIAB and Orchard Park

Catchment Zone	Sainsbury's Sidney Street 2015 ($000)	M&S Sidney Street 2015 ($000)	Cambridge City local stores 2015 ($000)	Histon Road Local Centre 2015 ($000)	Tesco Cheddars Lane 2015 ($000)	Asda Beehive Centre 2015 ($000)	Sainsbury's Coldham's Lane 2015 ($000)	Waitrose Trumpington 2015 ($000)	Tesco Bar Hill 2015 ($000)	Tesco Milton 2015 ($000)	Morrisons Cambourne 2015 ($000)	Tesco Yarrow Road 2015 ($000)	Sub-total 2015 ($000)	Other 2015 ($000)	CAMBRIDGE UNI STORE 2015 ($000)	NIAB STORE 2015 ($000)	ORCHARD PARK STORE 2015 ($000)	TOTAL 2015 ($000)
1	8,537	2,349	2,945	6,077	10,811	2,200	10,364	2,050	12,675	35,752	969	179	94,908	26,991	13,211	13,211	2,401	149,121
2	5,168	2,636	6,001	1,179	8,533	5,064	28,756	18,141	277	694	0	18,842	95,293	33,022	5,186	5,186	168	138,749
3	788	1,207	1,817	2,097	3,685	699	7,052	381	15,915	20,394	3,907	4,447	62,388	53,112	4,682	6,243	608	127,063
4	0	820	930	1,100	473	333	600	4,901	28,037	300	11,852	0	49,346	11,068	3,663	2,442	317	66,675
Sub-total	**14,493**	**7,012**	**11,693**	**10,453**	**23,503**	**8,296**	**46,772**	**25,474**	**56,904**	**57,139**	**16,728**	**23,468**	**301,935**	**124,194**	**26,742**	**27,082**	**3,494**	**481,608**
Estimated turnover from Zones 5-20	2,899	0	3,274	5,331	7,051	6,720	5,613	20,379	9,105	2,857	15,892	24,642	**103,761**	-	-	-	-	**103,761**
Total	**17,392**	**7,012**	**14,967**	**15,784**	**30,553**	**15,016**	**52,384**	**45,853**	**66,009**	**59,996**	**32,620**	**48,110**	**405,696**	**124,194**	**26,742**	**27,082**	**3,494**	**585,369**

Source: Tables 3 & 4

Cambridge University: North West Cambridge
Impact Assessment 2011

Table 22

Impact summary

	2010 (£000's) No new development	2016 (£000's) No new development	2021 (£000's) No new development	2016 (£000) with store at University site	Impact after Cambridge Uni store £000's	Impact after Cambridge Uni store %	2016 (£000) with stores at University & NIAB sites	Impact after stores at University & NIAB sites £000's	Impact after stores at University & NIAB sitess %	2016 (£000) with stores at University, NIAB & Orchard Park	Impact after stores at University, NIAB & Orchard Park £000's	Impact after stores at University, NIAB & Orchard Park %
Sainsbury's, Sidney Street, Cambridge City Centre	15,714	18,360	20,018	17,245	-1,116	-6.1	16,129	-2,231	-12.2	16,011	-2,349	-13.6
M&S, Sidney Street, Cambridge City Centre	5,953	6,980	7,646	6,698	-282	-4.0	6,416	-564	-8.1	6,403	-577	-8.6
Cambridge City Centre Local Stores	12,835	15,145	16,561	14,468	-676	-4.5	13,835	-1,310	-8.7	13,696	-1,449	-10.0
Histon Road Local Centre stores	13,635	15,861	17,542	15,435	-426	-2.7	15,009	-852	-5.4	14,262	-1,599	-10.4
Tesco, Cheddars lane (out-of-centre)	28,746	33,914	37,649	30,953	-2,961	-8.7	27,734	-6,180	-18.2	27,734	-6,180	-20.0
Asda, Beehive Centre (out-of-centre)	15,700	18,424	20,015	16,238	-2,186	-11.9	13,872	-4,551	-24.7	13,872	-4,551	-28.0
Sainsbury's, Coldham's Lane (out-of-centre)	45,391	53,985	59,425	50,965	-3,020	-5.6	47,797	-6,188	-11.5	47,797	-6,188	-12.1
Waitrose, Trumpington (out-of-centre)	45,037	52,264	55,298	47,782	-4,481	-8.6	43,421	-8,843	-16.9	43,421	-8,843	-18.5
Tesco, Bar Hill (out-of-centre)	63,629	72,567	78,831	64,908	-7,660	-10.6	60,833	-11,734	-16.2	60,715	-11,853	-18.3
Tesco, Milton (out-of-centre)	52,936	62,527	71,073	58,928	-3,599	-5.8	52,430	-10,097	-16.1	52,323	-10,205	-17.3
Morrisons, Cambourne	28,069	31,403	33,300	30,746	-657	-2.1	30,746	-657	-2.1	30,746	-657	-2.1
Tesco, Yarrow Road (out-of-centre)	39,192	47,533	52,847	46,046	-1,487	-3.1	43,746	-3,787	-8.0	43,746	-3,787	-8.2
Other	94,752	114,027	130,425	112,302	-1,725	-1.5	110,509	-3,518	-3.1	108,407	-5,620	-5.0

Cambridge University: North West Cambridge Impact Assessment 2011

Table 23

Cumulative effect on existing store turnover at 2016 and 2021

	Estimated company average 2016	Quantum of under/overtrading at 2016 ($000)	Estimated company average 2021	Quantum of under/overtrading at 2021 ($000)
Sainsbury's, Sidney Street, Cambridge City Centre	12,774	3,236	12,928	4,464
M&S, Sidney Street, Cambridge City Centre	13,196	-6,794	13,355	-6,343
Cambridge City Centre Local Stores	2,526	11,169	2,557	12,410
Histon Road Local Centre stores	7,662	6,599	7,754	8,029
Tesco, Cheddars lane (out-of-centre)	34,956	-7,222	35,377	-4,824
Asda, Beehive Centre (out-of-centre)	37,896	-24,023	38,353	-23,337
Sainsbury's, Coldham's Lane (out-of-centre)	30,275	17,522	30,640	21,744
Waitrose, Trumpington (out-of-centre)	32,270	11,151	32,659	13,194
Tesco, Bar Hill (out-of-centre)	52,715	8,000	53,350	12,659
Tesco, Milton (out-of-centre)	29,346	22,977	29,699	30,297
Morrisons, Cambourne	31,585	-839	31,966	654
Tesco, Yarrow Road (out-of-centre)	32,144	11,602	32,532	15,578