

Cambridgeshire County Council,
Peterborough City Council and Cambridge
City Council

**CAMBRIDGESHIRE & PETERBOROUGH
STRUCTURE PLAN REVIEW
RETAIL STUDY**

Executive Summary

July 2001

CB Hillier Parker
77 Grosvenor Street
London W1A 2BT

Tel: 020 7629 7666

Fax: 020 7882 8755

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1. CB Hillier Parker was appointed by Cambridgeshire County Council, Peterborough City Council and Cambridge City Council in August 2000 to undertake the Cambridgeshire and Peterborough Structure Plan Review Retail Study. The purpose of the study is to inform and guide the strategic retail planning of the principal towns in the Structure Plan area. In particular, the study will inform the review of the Cambridgeshire and Peterborough Structure Plan Review, and the Cambridge City Local Plan Review.
2. The study has been undertaken in two stages. In Stage 1, we establish the current baseline position of the principal centres. In Stage 2, we evaluate possible alternative scenarios for future development in the Cambridge sub-region. The final report presents the findings of both stages of our work. It covers the current retail planning policy position and current retail trends; competing retail destinations, including a consideration of the retail hierarchy in the Structure Plan area; an assessment of the vitality and viability of Cambridge City Centre, Peterborough City Centre and the market towns within the Structure Plan area; the results of our quantitative assessment of the current performance of Cambridge, Peterborough and the market towns; an assessment of retailer requirements for Cambridge, Peterborough and the market towns; an assessment of the scope for new development in the Structure Plan area; and our strategic policy options.
3. National policy guidance provides the framework for developing Structure Plan and Local Plan shopping policies which are tailored to the specific circumstances of Cambridge and Peterborough and their sub-regions. The broad thrust of the policy is to wherever possible sustain and enhance existing centres, and to plan positively for new development within existing town and district centres, consistent with their respective roles and needs of their catchments.
4. The key role of the Structure Plan is to provide a clear strategy for town centres and retail development within the Structure Plan area. The Structure Plan should set out the retail hierarchy indicating where investment in new retail development will be promoted and existing provision enhanced.

5. Planning Policy Guidance Note 6 on Town Centres and Retail Developments (PPG6) includes the concepts of need and the sequential approach. The Structure Plan in developing a Strategy for town centres and retail developments must consider 'need' for further retail floorspace at the strategic level across the whole Structure Plan area. Where a need is identified Local Plans must adopt a sequential approach to selecting sites for new retail development. Development must therefore take place on town centre sites, followed by edge of centre, district and local centres and only then out of centre.
6. PPG6 recognises that development plans cannot anticipate every proposal for retail development likely to come forward over the Plan period, therefore it endorses the use of criteria based policies in the Structure Plan, for development outside existing centres, which should include, inter alia, consideration of need, the sequential approach, impact and accessibility.
7. Planning Policy Guidance Note 13 on Transport (PPG13) seeks to reduce travel by car and encourage alternative means of travel. The Structure Plan should therefore seek wherever possible to ensure that new development is located in existing centres, served by a variety of means of transport.
8. Regional Planning Guidance for East Anglia (RPG6) advises that Cambridgeshire and Peterborough will need to accommodate the greatest proportion of new dwellings in the region; 4,000 per annum. The Structure Plan should make provision for this. RPG6 advises that there should be no need for an additional regional shopping centre in East Anglia. The Structure Plan should promote and enhance the vitality and attractiveness of city, town and local centres.
9. RPG6 promotes the continuing role of Peterborough as a sub-regional growth point and emphasises promoting and enhancing the vitality and attractiveness of the city centre. RPG6 advises that in the Structure Plan, Peterborough should be further developed as a major regional employment and service centre.

10. In the Cambridge sub-region RPG6 introduces a substantial change in planning policy, the restraint on housing development in and around Cambridge is to be reconsidered. The Green Belt is to be reviewed and proposals for a new settlement brought forward. The Structure Plan should identify locations for housing and related development in a particular order of preference, focusing firstly on the Cambridge built up area, followed by the Green Belt, a new settlement, the market towns built up area and finally extensions to the market towns, larger villages and previously established new settlements.
11. The adopted Cambridgeshire Structure Plan was formulated under previous national and regional planning policy guidance. There is therefore a need to up date the Structure Plan, providing a greater focus on existing town and city centres, introducing the concepts of need and the sequential approach, in addition to impact.
12. National retail trends indicate a contraction in the number of retail outlets, a slow down in the growth of retail sales and a slow down in the growth of retail floorspace, all of which are likely to reduce the scope for further retail floorspace in the Structure Plan area.
13. The key national trend affecting the centres in the Structure Plan area will be the polarisation by retailers towards larger schemes in larger centres, to the detriment of smaller centres. Cambridge and Peterborough are likely to maintain their role, given their size and the range of retail and other attractions and continued new investment. The market towns are, however, likely to be under greater threat from this concentration of retailing in larger towns. At the same time, local authorities should be seeking to encourage the role of towns as sustainable centres for their surrounding rural catchments.
14. The advent of new technology such as internet or digital television home shopping is unlikely to have a universal effect. Certain sub-sectors are likely to be more affected than others. Centres such as Cambridge and Peterborough that offer a range of complementary, non-retail attractions and/or offer a high level of convenient shopping facilities are likely to be more resilient to these changes. The market towns in the Structure Plan area are most likely to be challenged by the growth in Internet shopping, particularly if it provides a convenient and reliable alternative.

15. Changes are occurring in the traditional high street fascias as evidenced by closures and rationalisation and the emergence of new international retailers. These changes are most likely to affect the larger city centres of Cambridge and Peterborough which accommodate retailers such as Marks and Spencer. Certain department store groupings are undergoing expansion, whereas smaller and independent players and Co-op are rationalising. In the future this could affect the larger market towns such as Wisbech which has a small Co-op department store.
16. Whilst there has been a slow down in out of centre floorspace development, where opportunities arise there is continued pressure for large store formats. It will be essential that the cities and towns in the Structure Plan area resist the development of high street type comparison goods in out of centre locations.
17. Food retailers are continuing to innovate. Some have developed smaller store formats, and been more innovative in their town centre proposals. However, the pressure for larger superstores and hypermarkets will continue, including pressure for the further expansion of successful out-of-centre foodstores, driven by consumer demand. With town centre foodstores tending to underpin the role of smaller market towns and district centres, the cumulative impact of these superstores may undermine smaller centres over a number of years. Any further proposals for expansion of existing out of centre convenience stores must be considered in terms of need, sequential approach and impact.
18. Growth in certain sectors of the leisure industry, particularly eating out and sightseeing could benefit the city centres and market towns within the Structure Plan area.
19. There are many transport measures which will encourage increased movement by non-car modes. Cambridge in particular has already put into practice measures promoting Park and Ride, cycling and walking and these are likely to have enhanced vitality and viability. Elsewhere in the Structure Plan area there could be scope for improvements in the future

including improve bus services, in particular reliability, further pedestrianisation in appropriately sized towns, improved rail facilities and services and better cycling facilities.

20. Drawing on a range of indicators, including multiple representation and changes over time, future commitments, comparison and convenience floorspace and comparison and convenience goods trade draw, our assessment of the regional context has indicated difference categories of towns within the Structure Plan area.

21. At the highest level the sub-regional centres of Cambridge and Peterborough have a significant retail offer and draw trade from a wide area. We consider that beneath these centres there are two categories of market towns, large/ medium and small. Whilst some market towns fall into different categories depending upon the indicator used, broadly the larger market towns have more multiple retailers, more floorspace and a wider draw/catchment and the smaller market towns have with fewer national multiple retailers, less floorspace and a narrower trade draw. The broad categories are as follows:

Large/Medium Market Towns: Huntingdon, Wisbech, Ely and St Neots

Small Market Towns: March, St Ives, Whittlesey, Ramsey and Chatteris

22. Our assessment of the health of Cambridge City Centre, drawing on the PPG6 performance measures, indicates that it is vital and viable centre, meeting the needs of residents, students and tourists.

23. The diversity of uses in Cambridge City Centre reflects function as a higher order shopping destination, focusing on comparison goods provision. The combined offer of The Historic Centre and the Fitzroy/Burleigh Street area provide an extensive range of upper and middle market retailer outlets. Following the closure of the Eaden Lilley department store there is now only one department store in the Historic Centre and one in The Grafton Centre. Pedestrian flows in Cambridge City Centre reflect the primacy of Lion Yard and Petty Cury.

24. Prime retail rental values in Cambridge are the highest of all the competing sub-regional centres and have shown considerable improvements over the last six years. Prime retail yields are the lowest of all the competing centres and reflect investor confidence in the centre. The vacancy rate in Cambridge is very low.
25. Although there are more car parking spaces in Cambridge City Centre than for other centres, provision cannot keep pace with demand. Charges are the highest of any of the competing sub-regional centres. A sustainable transport strategy for the city must improve access by other modes including bus services and park and ride.
26. Users of Cambridge City Centre like its proximity to home, range of non-food shops and the attractive historic environment. The most frequently mentioned issue is the lack of parking facilities and the difficulty of parking near the shops. Most people use Cambridge City Centre for non food shopping to purchase clothing and footwear and leisure goods.
27. The attractive, historic environment of Cambridge City Centre is a key strength. However, in seeking to conserve and enhance this, there is a need to manage the impact of the car and ensure that new development is appropriate in scale, form and design.
28. Peterborough City Centre is also a vital and viable centre according to the key indicators set out in PPG6.
29. The City Centre has a lower than average provision of convenience goods retailers, but a substantially higher proportion of comparison goods retailers. This reflects the city centre's important role in the retail hierarchy as a sub regional shopping destination. Whilst the City Centre has a comprehensive range of mainstream national multiples consistent with its role as a sub regional centre, it is less well provided for in terms of speciality shops and more up market fashion retailers than some competing centres (e.g. Cambridge).

30. Prime Zone A retail rents have out performed the regional East Anglian and national All Shops averages between May 1994 and August 1999. Vacancy levels in the City centre are below the national average, as measured by Experian Goad. In particular vacancy levels in the prime retail area of the city centre are extremely low.
31. Improvements to the road network means that accessibility to the city centre is generally good, although road links to the east of the city are still somewhat poor. Vehicular access in and around the city is generally good, and pedestrian movements in the city centre are facilitated by the high degree of pedestrianisation.
32. Whilst the City Centre provides a reasonably attractive shopping environment for shoppers and visitors, we consider that generally it would benefit from wider environmental improvements, particularly to street furniture, lighting and signage.
33. Our health checks of the market towns in the Structure Plan indicate that they are generally performing well. We have concluded that Huntingdon, Ely, St Neots and St Ives are all vital and viable centres. The centres which appear to be experiencing some difficulties are Wisbech and March. The smaller centres of Ramsey, Chatteris and Whittlesey all appear relatively stable.
34. In terms of the centres outside the Structure Plan area we consider that Newmarket, Saffron Walden and Haverhill are all vital and viable. The centres which appear to have some difficulties are Royston and Biggleswade.
35. Cambridge City Centre convenience goods retailers and the out of centre superstores are performing well and at slightly above average levels. The City Centre convenience goods provision is much more limited and hence the turnover considerably lower than out of centre. The comparison goods turnover of Cambridge City Centre is considerable and we estimate that retailers are trading extremely well. Out of centre retail warehouses are not performing as well, but the provision is currently much more limited.

36. Peterborough City Centre convenience goods retailers are somewhat under trading, whereas the out of centre convenience goods retailers are over trading. Whilst the comparison goods turnover of Peterborough City Centre is lower than that of Cambridge City Centre, we estimate that comparison goods retailers are trading well. As in Cambridge, out of centre retail warehouses in Peterborough are under performing.
37. Huntingdon has the highest convenience goods turnover of all the market towns, followed by Ely, St Neots and then Wisbech. The lower position of Wisbech may partly reflect the more limited convenience goods offer at the time of our survey in 1999. The next centres in terms of convenience goods turnover are March and St Ives followed by Whittlesey, Ramsey and Chatteris. Overall it is evident that the larger market towns are trading well in terms of convenience goods. Some of the smaller towns are not performing as well.
38. In terms of the comparison goods turnover of the market towns again the clear indication is the higher order nature of Huntingdon, Wisbech, Ely and St Neots. Wisbech has a higher turnover than Ely and St Neots. March and St Ives have broadly similar turnovers as do the smaller market towns of Whittlesey, Ramsey and Chatteris. We consider that all of the market towns, with the possible exception of Wisbech are trading adequately in terms of their comparison goods turnover.
39. None of the principal centres outside the Structure Plan area have a higher convenience goods turnover than Huntingdon or Ely. Newmarket and Royston have a similar level of convenience goods turnover to St Neots, they are followed by Haverhill and Saffron Walden which have a similar level of convenience goods turnover to March and then Biggleswade. All of the towns outside the Structure Plan area are either performing at above or average levels.
40. Outside the Structure Plan area the predominance of Newmarket as a convenience goods shopping destination is evident from the considerable turnover of the town centre. Saffron Walden, Haverhill and Biggleswade all have broadly similar convenience goods turnovers with Royston at a lower level. Newmarket is clearly trading well, in terms of its comparison

goods sales density, it is followed by Saffron Walden, Haverhill, Royston and then Biggleswade. We consider that these market towns are performing adequately.

41. The strength of Cambridge City Centre is evident from the level of retailer demand. The Focus Database indicates provisional interest from 153 operators. In particular clothing and footwear retailers and variety/department store operators have extensive requirements. These levels are clear evidence of the pent up demand for new floorspace in Cambridge.
42. Whilst Peterborough had fewer retailer requirements (64 from the Focus Database), a CB Hillier Parker survey and one undertaken by Drivers Jonas indicate reasonably strong interest from clothes retailers and other comparison goods retailers which are already located in the City Centre, but require improved premises. We consider that the levels of demand suggest a reasonably healthy level of interest, and sufficient to potentially support substantial additional retail floorspace development.
43. Of the market towns in the Structure Plan area, Huntingdon has the greatest number of requirements (18), with St Ives, Wisbech and Ely all having broadly the same number (8-9). We consider it unlikely that the levels of retailer demand for these market towns would support new shopping schemes, with the possible exception of Huntingdon. Rather the retailer requirements provide a positive indication that infill development and minor redevelopment would be taken up, provided any new units are of a sufficient size and scale to meet modern retailing needs.
44. We do not consider that there is any scope for further convenience goods floorspace in Cambridge over the Structure Plan period, even with any of the strategic growth options.
45. In contrast, we estimate that all of the strategic growth options will enhance the scope for additional comparison goods floorspace in Cambridge City Centre towards the end of the Structure Plan period. This theoretical City Centre has to be balanced against the continuing over supply of bulky goods retail warehousing out of centre, even with strategic growth, throughout the Structure Plan period. In addition this theoretical capacity may not

be realised because of changing trends of the period such as lower expenditure growth and greater efficiency in the use of existing space. We suggest that, assuming existing commitments go ahead, any surplus expenditure that is created should be focused on enhancement and renewal of the existing provision. This would enable more effective use of existing space in the City Centre. Any redevelopment would however be subject to environmental capacity constraints.

46. With the exception of Ely, we consider that there is unlikely to be any significant strategic convenience goods floorspace capacity in any of the Large/Medium Market Towns over the Structure Plan period. This situation remains with all the strategic growth options. Any surplus expenditure should be focused on sustaining and enhancing the existing provision. Whilst a more detailed local level appraisal of the situation in Ely will be necessary we consider that, taking into account qualitative factors, there is no overriding need for further convenience goods floorspace floorspace.
47. In the Smaller Market Towns of March and St Ives we consider that there is currently of an over supply of convenience goods floorspace. Whilst the strategic growth options limit this, sufficient capacity will not be created to support any new foodstores in these towns. In Ramsey, Whittlesey and Chatteris we have not forecast any surplus convenience goods capacity to support new foodstores, even with the strategic growth options.
48. We forecast some surplus comparison goods capacity in the Large/Medium Market Towns of Huntingdon, Wisbech, Ely and St Neots. The strategic growth options increase this capacity to the greatest degree in Huntingdon, particularly both the Market Towns Options. Whilst we consider that there is scope for some new development in Huntingdon, in Wisbech, Ely and St Neots the surplus expenditure should be focused on sustaining and enhancing the existing provision, enabling existing retailers to intensify their turnovers. We do not consider that there is scope for any comparison goods development in the Small Market Towns within the Structure Plan area.
49. In both the baseline and under the strategic growth options we forecast additional convenience goods capacity in Royston and Newmarket for new food stores. Whilst further

foodstore provision in Newmarket is unlikely to impact upon Cambridge because they have different catchment areas, an enhanced provision in Royston could have more of an impact as it draws from the catchment of the out of centre foodstores in Cambridge. The overall effect would be to further reduce the capacity in Cambridge for convenience goods floorspace.

50. In the market towns outside the Structure Plan area we forecast capacity for further comparison goods floorspace. The greatest amount of capacity is in Newmarket. In the other market towns the amount of forecast capacity is more limited.
51. In Peterborough we forecast some capacity for further convenience goods floorspace by virtue of the level of over trading of the out of centre food superstores. We considered that this should effectively support the development of a new discount food retailer which was in the pipeline and has now been built and possibly one other such retailer in the period to 2006.
52. We have only forecast limited capacity for comparison goods in the period to 2001, largely because of the need for the Serpentine Green District Centre to consolidate market share. Beyond then however, as in the Cambridge sub-region the significant growth in population and expenditure are such that considerable new comparison goods floorspace could be supported. We consider that the strategic growth options for Peterborough and North Cambridgeshire will reinforce this conclusion on the potential capacity in Peterborough.
53. We have detailed three key strategic retail planning policy areas for consideration in the preparation of the Structure Plan Review. These are the hierarchy of centres in the Structure Plan area, retail need, and a criteria based policy dealing with new development.
54. CB Hillier Parker was appointed by Cambridgeshire County Council, Peterborough City Council and Cambridge City Council in August 2000 to undertake the Cambridgeshire and Peterborough Structure Plan Review Retail Study. The purpose of the study is to inform and guide the strategic retail planning of the principal towns in the Structure Plan area. In

particular, the study will inform the review of the Cambridgeshire and Peterborough Structure Plan Review, and the Cambridge City Local Plan Review.

55. The study has been undertaken in two stages. In Stage 1, we establish the current baseline position of the principal centres. In Stage 2, we evaluate possible alternative scenarios for future development in the Cambridge sub-region. The final report presents the findings of both stages of our work. It covers the current retail planning policy position and current retail trends; competing retail destinations, including a consideration of the retail hierarchy in the Structure Plan area; an assessment of the vitality and viability of Cambridge City Centre, Peterborough City Centre and the market towns within the Structure Plan area; the results of our quantitative assessment of the current performance of Cambridge, Peterborough and the market towns; an assessment of retailer requirements for Cambridge, Peterborough and the market towns; an assessment of the scope for new development in the Structure Plan area; and our strategic policy options.
56. National policy guidance provides the framework for developing Structure Plan and Local Plan shopping policies which are tailored to the specific circumstances of Cambridge and Peterborough and their sub-regions. The broad thrust of the policy is to wherever possible sustain and enhance existing centres, and to plan positively for new development within existing town and district centres, consistent with their respective roles and needs of their catchments.
57. The key role of the Structure Plan is to provide a clear strategy for town centres and retail development within the Structure Plan area. The Structure Plan should set out the retail hierarchy indicating where investment in new retail development will be promoted and existing provision enhanced.
58. Planning Policy Guidance Note 6 on Town Centres and Retail Developments (PPG6) includes the concepts of need and the sequential approach. The Structure Plan in developing a Strategy for town centres and retail developments must consider 'need' for further retail floorspace at the strategic level across the whole Structure Plan area. Where a need is identified Local Plans must adopt a sequential approach to selecting sites for

new retail development. Development must therefore take place on town centre sites, followed by edge of centre, district and local centres and only then out of centre.

59. PPG6 recognises that development plans cannot anticipate every proposal for retail development likely to come forward over the Plan period, therefore it endorses the use of criteria based policies in the Structure Plan, for development outside existing centres, which should include, inter alia, consideration of need, the sequential approach, impact and accessibility.
60. Planning Policy Guidance Note 13 on Transport (PPG13) seeks to reduce travel by car and encourage alternative means of travel. The Structure Plan should therefore seek wherever possible to ensure that new development is located in existing centres, served by a variety of means of transport.
61. Regional Planning Guidance for East Anglia (RPG6) advises that Cambridgeshire and Peterborough will need to accommodate the greatest proportion of new dwellings in the region; 4,000 per annum. The Structure Plan should make provision for this. RPG6 advises that there should be no need for an additional regional shopping centre in East Anglia. The Structure Plan should promote and enhance the vitality and attractiveness of city, town and local centres.
62. RPG6 promotes the continuing role of Peterborough as a sub-regional growth point and emphasises promoting and enhancing the vitality and attractiveness of the city centre. RPG6 advises that in the Structure Plan, Peterborough should be further developed as a major regional employment and service centre.
63. In the Cambridge sub-region RPG6 introduces a substantial change in planning policy, the restraint on housing development in and around Cambridge is to be reconsidered. The Green Belt is to be reviewed and proposals for a new settlement brought forward. The Structure Plan should identify locations for housing and related development in a particular order of preference, focusing firstly on the Cambridge built up area, followed by the Green

Belt, a new settlement, the market towns built up area and finally extensions to the market towns, larger villages and previously established new settlements.

64. The adopted Cambridgeshire Structure Plan was formulated under previous national and regional planning policy guidance. There is therefore a need to up date the Structure Plan, providing a greater focus on existing town and city centres, introducing the concepts of need and the sequential approach, in addition to impact.
65. National retail trends indicate a contraction in the number of retail outlets, a slow down in the growth of retail sales and a slow down in the growth of retail floorspace, all of which are likely to reduce the scope for further retail floorspace in the Structure Plan area.
66. The key national trend affecting the centres in the Structure Plan area, will be the polarisation by retailers towards larger schemes in larger centres, to the detriment of smaller centres. Cambridge and Peterborough are likely to maintain their role, given their size and the range of retail and other attractions and continued new investment. The market towns are, however, likely to be under greater threat from this concentration of retailing in larger towns. At the same time, local authorities should be seeking to encourage the role of towns as sustainable centres for their surrounding rural catchments.
67. The advent of new technology such as internet or digital television home shopping is unlikely to have a universal effect. Certain sub-sectors are likely to be more affected than others. Centres such as Cambridge and Peterborough that offer a range of complementary, non-retail attractions and/or offer a high level of convenient shopping facilities are likely to be more resilient to these changes. The market towns in the Structure Plan area are most likely to be challenged by the growth in Internet shopping, particularly if it provides a convenient and reliable alternative.
68. Changes are occurring in the traditional high street fascias as evidenced by closures and rationalisation and the emergence of new international retailers. These changes are most likely to affect the larger city centres of Cambridge and Peterborough which

accommodate retailers such as Marks and Spencer. Certain department store groupings are undergoing expansion, whereas smaller and independent players and Co-op are rationalising. In the future this could effect the larger market towns such as Wisbech which has a small Co-op department store.

69. Whilst there has been a slow down in out of centre floorspace development, where opportunities arise there is continued pressure for large store formats. It will be essential that the cities and towns in the Structure Plan area resist the development of high street type comparison goods in out of centre locations.
70. Food retailers are continuing to innovate. Some have developed smaller store formats, and been more innovative in their town centre proposals. However, the pressure for larger superstores and hypermarkets will continue, including pressure for the further expansion of successful out-of-centre foodstores, driven by consumer demand. With town centre foodstores tending to underpin the role of smaller market towns and district centres, the cumulative impact of these superstores may undermine smaller centres over a number of years. Any further proposals for expansion of existing out of centre convenience stores must be considered in terms of need, sequential approach and impact.
71. Growth in certain sectors of the leisure industry, particularly eating out and sightseeing could benefit the city centres and market towns within the Structure Plan area.
72. There are many transport measures which will encourage increased movement by non-car modes. Cambridge in particular has already put into practice measures promoting Park and Ride, cycling and walking and these are likely to have enhanced vitality and viability. Elsewhere in the Structure Plan area there could be scope for improvements in the future including improve bus services, in particular reliability, further pedestrianisation in appropriately sized towns, improved rail facilities and services and better cycling facilities.
73. Drawing on a range of indicators, including multiple representation and changes over time, future commitments, comparison and convenience floorspace and comparison and

convenience goods trade draw, our assessment of the regional context has indicated difference categories of towns within the Structure Plan area.

74. At the highest level the sub-regional centres of Cambridge and Peterborough have a significant retail offer and draw trade from a wide area. We consider that beneath these centres there are two categories of market towns, large/ medium and small. Whilst some market towns fall into different categories depending upon the indicator used, broadly the larger market towns have more multiple retailers, more floorspace and a wider draw/catchment and the smaller market towns have with fewer national multiple retailers, less floorspace and a narrower trade draw. The broad categories are as follows:

Large/Medium Market Towns: Huntingdon, Wisbech, Ely and St Neots

Small Market Towns: March, St Ives, Whittlesey, Ramsey and Chatteris

75. Our assessment of the health of Cambridge City Centre, drawing on the PPG6 performance measures, indicates that it is vital and viable centre, meeting the needs of residents, students and tourists.
76. The diversity of uses in Cambridge City Centre reflects function as a higher order shopping destination, focusing on comparison goods provision. The combined offer of The Historic Centre and the Fitzroy/Burleigh Street area provide an extensive range of upper and middle market retailer outlets. Following the closure of the Eaden Lilley department store there is now only one department store in the Historic Centre and one in The Grafton Centre. Pedestrian flows in Cambridge City Centre reflect the primacy of Lion Yard and Petty Cury.
77. Prime retail rental values in Cambridge are the highest of all the competing sub-regional centres and have shown considerable improvements over the last six years. Prime retail yields are the lowest of all the competing centres and reflect investor confidence in the centre. The vacancy rate in Cambridge is very low.

78. Although there are more car parking spaces in Cambridge City Centre than for other centres, provision cannot keep pace with demand. Charges are the highest of any of the competing sub-regional centres. A sustainable transport strategy for the city must improve access by other modes including bus services and park and ride.
79. Users of Cambridge City Centre like its proximity to home, range of non-food shops and the attractive historic environment. The most frequently mentioned issue is the lack of parking facilities and the difficulty of parking near the shops. Most people use Cambridge City Centre for non food shopping to purchase clothing and footwear and leisure goods.
80. The attractive, historic environment of Cambridge City Centre is a key strength. However, in seeking to conserve and enhance this, there is a need to manage the impact of the car and ensure that new development is appropriate in scale, form and design.
81. Peterborough City Centre is also a vital and viable centre according to the key indicators set out in PPG6.
82. The City Centre has a lower than average provision of convenience goods retailers, but a substantially higher proportion of comparison goods retailers. This reflects the city centre's important role in the retail hierarchy as a sub regional shopping destination. Whilst the City Centre has a comprehensive range of mainstream national multiples consistent with its role as a sub regional centre, it is less well provided for in terms of speciality shops and more up market fashion retailers than some competing centres (e.g. Cambridge).
83. Prime Zone A retail rents have out performed the regional East Anglian and national All Shops averages between May 1994 and August 1999. Vacancy levels in the City centre are below the national average, as measured by Experian Goad. In particular vacancy levels in the prime retail area of the city centre are extremely low.

84. Improvements to the road network means that accessibility to the city centre is generally good, although road links to the east of the city are still somewhat poor. Vehicular access in and around the city is generally good, and pedestrian movements in the city centre are facilitated by the high degree of pedestrianisation.
85. Whilst the City Centre provides a reasonably attractive shopping environment for shoppers and visitors, we consider that generally it would benefit from wider environmental improvements, particularly to street furniture, lighting and signage.
86. Our health checks of the market towns in the Structure Plan indicate that they are generally performing well. We have concluded that Huntingdon, Ely, St Neots and St Ives are all vital and viable centres. The centres which appear to be experiencing some difficulties are Wisbech and March. The smaller centres of Ramsey, Chatteris and Whittlesey all appear relatively stable.
87. In terms of the centres outside the Structure Plan area we consider that Newmarket, Saffron Walden and Haverhill are all vital and viable. The centres which appear to have some difficulties are Royston and Biggleswade.
88. Cambridge City Centre convenience goods retailers and the out of centre superstores are performing well and at slightly above average levels. The City Centre convenience goods provision is much more limited and hence the turnover considerably lower than out of centre. The comparison goods turnover of Cambridge City Centre is considerable and we estimate that retailers are trading extremely well. Out of centre retail warehouses are not performing as well, but the provision is currently much more limited.
89. Peterborough City Centre convenience goods retailers are somewhat under trading, whereas the out of centre convenience goods retailers are over trading. Whilst the comparison goods turnover of Peterborough City Centre is lower than that of Cambridge City Centre, we estimate that comparison goods retailers are trading well. As in Cambridge, out of centre retail warehouses in Peterborough are under performing.

90. Huntingdon has the highest convenience goods turnover of all the market towns, followed by Ely, St Neots and then Wisbech. The lower position of Wisbech may partly reflect the more limited convenience goods offer at the time of our survey in 1999. The next centres in terms of convenience goods turnover are March and St Ives followed by Whittlesey, Ramsey and Chatteris. Overall it is evident that the larger market towns are trading well in terms of convenience goods. Some of the smaller towns are not performing as well.
91. In terms of the comparison goods turnover of the market towns again the clear indication is the higher order nature of Huntingdon, Wisbech, Ely and St Neots. Wisbech has a higher turnover than Ely and St Neots. March and St Ives have broadly similar turnovers as do the smaller market towns of Whittlesey, Ramsey and Chatteris. We consider that all of the market towns, with the possible exception of Wisbech are trading adequately in terms of their comparison goods turnover.
92. None of the principal centres outside the Structure Plan area have a higher convenience goods turnover than Huntingdon or Ely. Newmarket and Royston have a similar level of convenience goods turnover to St Neots, they are followed by Haverhill and Saffron Walden which have a similar level of convenience goods turnover to March and then Biggleswade. All of the towns outside the Structure Plan area are either performing at above or average levels.
93. Outside the Structure Plan area the predominance of Newmarket as a convenience goods shopping destination is evident from the considerable turnover of the town centre. Saffron Walden, Haverhill and Biggleswade all have broadly similar convenience goods turnovers with Royston at a lower level. Newmarket is clearly trading well, in terms of its comparison goods sales density, it is followed by Saffron Walden, Haverhill, Royston and then Biggleswade. We consider that these market towns are performing adequately.
94. The strength of Cambridge City Centre is evident from the level of retailer demand. The Focus Database indicates provisional interest from 153 operators. In particular clothing and footwear retailers and variety/department store operators have extensive requirements. These levels are clear evidence of the pent up demand for new floorspace in Cambridge.

95. Whilst Peterborough had fewer retailer requirements (64 from the Focus Database), a CB Hillier Parker survey and one undertaken by Drivers Jonas indicate reasonably strong interest from clothes retailers and other comparison goods retailers which are already located in the City Centre, but require improved premises. We consider that the levels of demand suggest a reasonably healthy level of interest, and sufficient to potentially support substantial additional retail floorspace development.

96. Of the market towns in the Structure Plan area, Huntingdon has the greatest number of requirements (18), with St Ives, Wisbech and Ely all having broadly the same number (8-9). We consider it unlikely that the levels of retailer demand for these market towns would support new shopping schemes, with the possible exception of Huntingdon. Rather the retailer requirements provide a positive indication that infill development and minor redevelopment would be taken up, provided any new units are of a sufficient size and scale to meet modern retailing needs.

97. We do not consider that there is any scope for further convenience goods floorspace in Cambridge over the Structure Plan period, even with any of the strategic growth options.

98. In contrast, we estimate that all of the strategic growth options will enhance the scope for additional comparison goods floorspace in Cambridge City Centre towards the end of the Structure Plan period. This theoretical City Centre has to be balanced against the continuing over supply of bulky goods retail warehousing out of centre, even with strategic growth, throughout the Structure Plan period. In addition this theoretical capacity may not be realised because of changing trends of the period such as lower expenditure growth and greater efficiency in the use of existing space. We suggest that, assuming existing commitments go ahead, any surplus expenditure that is created should be focused on enhancement and renewal of the existing provision. This would enable more effective use of existing space in the City Centre. Any redevelopment would however be subject to environmental capacity constraints.

99. With the exception of Ely, we consider that there is unlikely to be any significant strategic convenience goods floorspace capacity in any of the Large/Medium Market Towns over the Structure Plan period. This situation remains with all the strategic growth options. Any surplus expenditure should be focused on sustaining and enhancing the existing provision. Whilst a more detailed local level appraisal of the situation in Ely will be necessary we consider that, taking into account qualitative factors, there is no overriding need for further convenience goods floorspace floorspace.
100. In the Smaller Market Towns of March and St Ives we consider that there is currently of an over supply of convenience goods floorspace. Whilst the strategic growth options limit this, sufficient capacity will not be created to support any new foodstores in these towns. In Ramsey, Whittlesey and Chatteris we have not forecast any surplus convenience goods capacity to support new foodstores, even with the strategic growth options.
101. We forecast some surplus comparison goods capacity in the Large/Medium Market Towns of Huntingdon, Wisbech, Ely and St Neots. The strategic growth options increase this capacity to the greatest degree in Huntingdon, particularly both the Market Towns Options. Whilst we consider that there is scope for some new development in Huntingdon, in Wisbech, Ely and St Neots the surplus expenditure should be focused on sustaining and enhancing the existing provision, enabling existing retailers to intensify their turnovers. We do not consider that there is scope for any comparison goods development in the Small Market Towns within the Structure Plan area.
102. In both the baseline and under the strategic growth options we forecast additional convenience goods capacity in Royston and Newmarket for new food stores. Whilst further foodstore provision in Newmarket is unlikely to impact upon Cambridge because they have different catchment areas, an enhanced provision in Royston could have more of an impact as it draws from the catchment of the out of centre foodstores in Cambridge. The overall effect would be to further reduce the capacity in Cambridge for convenience goods floorspace.

103. In the market towns outside the Structure Plan area we forecast capacity for further comparison goods floorspace. The greatest amount of capacity is in Newmarket. In the other market towns the amount of forecast capacity is more limited.

104. In Peterborough we forecast some capacity for further convenience goods floorspace by virtue of the level of over trading of the out of centre food superstores. We considered that this should effectively support the development of a new discount food retailer which was in the pipeline and has now been built and possibly one other such retailer in the period to 2006.

105. We have only forecast limited capacity for comparison goods in the period to 2001, largely because of the need for the Serpentine Green District Centre to consolidate market share. Beyond then however, as in the Cambridge sub-region the significant growth in population and expenditure are such that considerable new comparison goods floorspace could be supported. We consider that the strategic growth options for Peterborough and North Cambridgeshire will reinforce this conclusion on the potential capacity in Peterborough.

106. We have detailed three key strategic retail planning policy areas for consideration in the preparation of the Structure Plan Review. These are the hierarchy of centres in the Structure Plan area, retail need, and a criteria based policy dealing with new development.