East Cambridgeshire District Council

Retail Study 2012-
Updated Partial Review

Driving Forward Growth in
East Cambridgeshire

East Cambridgeshire
District Council

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1 INTRODUCTION

1.1 East Cambridgeshire District Council (ECDC) has undertaken a District-wide retail study looking at the period up to 2031, focusing on the three market towns of Ely, Soham and Littleport, and eight local centres: Bottisham, Burwell, Fordham, Haddenham, Isleham, Little Downham, Stretham and Sutton.

1.2 The District Council commissioned the East Cambridgeshire District Council Retail Study (ECRS) in 2005 which was prepared by Roger Tym and Partners. This was updated in 2009 and provided the basis for the retail policies in the East Cambridgeshire Core Strategy. The East Cambridgeshire Retail Study 2012 – Updated Partial Review involves a partial update of the ECRS to provide a robust and sound evidence base to inform the revised East Cambridgeshire Local Plan 2012-2031. This Study examines the changes that have taken place within the retail centres of the district and provides an update on the population and expenditure figures that were contained in the ECRS to assess whether there is any additional capacity for retail floorspace in the district up to 2031. The report has been undertaken largely in house by the business development team at ECDC with input from Alison Hutchinson of Hutchinsons. This study also updates previous retail healthcheck work undertaken in 2005 by Roger Tym and Partners which was partially updated in 2009.

1.3 The 2012 Study draws on the methodology contained in the ECRS to outline the need for new comparison and convenience floorspace between 2011-2016, 2016-2021, 2021-2026, 2026-2031. Alongside this the report will also give an overview of the current health of the retail centres of Ely, Soham and Littleport alongside an outline of the local centres performance within East Cambridgeshire.

Report Structure

1.4 The East Cambridgeshire Retail Study 2012 draws together quantitative and qualitative research and analysis in the following structure:

- A summary of the national and local policy context
- A review of the sub-regional context, retail hierarchy and competing centres
- Assessment of the vitality and viability of Ely, Soham & Littleport
- A review of eight local centres within East Cambridgeshire
- A quantitative analysis of future comparison and convenience retail needs capacity
- Testing of alternative scenario 'sensitivities'
- Overall conclusions and recommendations

National Policy Context

1.5 The National Planning Policy Framework (NPPF) was published on 27th March 2012. The policies within NPPF set out the Government's planning policies for England and how these are expected to be applied. At the heart of the NPPF is 'a presumption in favour of sustainable development', which should be seen as a golden thread running through both plan making and decision taking. The NPPF replaces Planning Policy statement 4: Planning for

Sustainable Economic Growth which had been the Government's national policy statement in relation to town centres and the location of new retail, office and leisure developments since December 2009.

The Government's Objectives for Achieving Sustainable Development

1.6 The Government's overarching objective as set out in paragraph 6 of the NPPF is to achieve 'sustainable development' by enabling the planning system to perform a number of roles:

- an economic role - contributing to building a strong, responsive and competitive economy;
- a social role - supporting strong, vibrant and healthy communities; and
- an environmental role; contributing to protecting and enhancing our natural, built and historic environment.

The Evidence Base

1.7 Paragraph 158 of the NPPF says that 'each local authority should ensure that the Local Plan is based on adequate, up to date and relevant evidence about the economic, social and environmental characteristics and prospects of the area.' For business uses the NPPF sets out in paragraph 161 that local planning authorities should use this evidence base to assess:

- the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;
- the role and function of the town centres and the relationship between them, including any trends in the performance of centres;
- the capacity of existing centres to accommodate new town centre development.

Plan making policies

1.8 The NPPF sets out in paragraph 23 that 'planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period.' The NPPF says that in drawing up Local Plans, local planning authorities should:

- recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development in town centres. Local planning authorities should therefore undertake an

assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;

- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available.
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated on or adjacent to town centres;
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

Development Management Policies

1.9 Paragraph 15 of the NPPF advises that 'policies in Local Plans should follow the approach of the presumption in favour of sustainable development so that it is clear that development that is sustainable can be approved without delay.'

1.10 Paragraph 24 requires that local planning authorities should apply a sequential test to planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up to date Local Plan. They should require applications for main town centre uses to be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered.

1.11 Paragraph 26 states that 'when assessing applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date Local Plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sq m)'. This should include assessment of:

- 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 five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should also be assessed up to ten years from the time the application is made.

1.12 In making a planning decision based upon an impact assessment, paragraph 27 advises that planning applications should be refused where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the above factors.

Local Policy Context

1.13 The current East Cambridgeshire Core Strategy approved in 2009 states that town and village centres are at the heart of our communities and provide a focus where people shop, work, live and visit. It is important that these centres are vibrant and attractive environments, and offer a range of retail, leisure and other 'town centre uses' which meet the needs of the community and visitors. Successful centres can help to improve the quality of people's lives, boost the local economy, and reduce the need to travel by concentrating development in accessible locations. Promoting the health of the district's town and village centres is also one of the aims of the Council's Sustainable Community Strategy, and one of the key strategic objectives underpinning the Core Strategy.

Retail and town centre uses

1.14 The town centres of Ely, Soham and Littleport will be strengthened and regenerated as the focus of sustainable communities in East Cambridgeshire. Support will be given to uses and activities which sustain and improve their vitality and viability, character and attractiveness and lead to centres becoming more vibrant and economically successful.

1.15 Ely is identified as the 'Major Town Centre' in the district, and will act as the main focus for shopping, leisure, and cultural development in East Cambridgeshire. Large-scale retail and leisure development, or other uses that attract large numbers of people should be located in Ely.

1.16 Soham and Littleport are identified as 'Secondary Town Centres', which act as service centres for smaller rural catchment areas. In these centres, support will be given to development which is focused on meeting local needs and supporting town centre regeneration.

1.17 Support will be given to the continued role of 'Local Centres' (existing village centres) in providing for local and daily service needs of their community. In the Countryside, retail, leisure and commercial development will be limited to exceptions permitted under other policies in this Plan.

1.18 In order to maintain and promote the vitality of the district's town centres, provision will be made to accommodate additional retail floorspace over the Plan period. Retail provision should be focused in identified town centres wherever possible.

2 DESCRIPTION OF THE RETAIL HIERARCHY

2.1 The East of England has an established structure of retail centres ranging from major retail centres to smaller market towns and villages, and the region is not dominated by any one retail centre. The retail hierarchy in the East of England region can be summarised as:

- Major regional centres;
- Regional centres;
- Other towns and market towns;
- Local centres;
- Villages.

2.2 This retail hierarchy is reinforced by policies at all levels of the outlined hierarchy. In essence these policies seek to locate new retail development in existing centres in accordance with their respective role in the hierarchy, and the sequential approach. These policies also seek to ensure that new retail development is consistent with the scale and character of the centre and its role in the regional hierarchy. A description of the sub-regional context and competing centres offers is outlined below.

Sub-Regional Context

Cambridge

2.3 Cambridge is situated approximately 29km to the south of Ely along the A10. Cambridge city centre is the main regional shopping and service centre as well as a key tourist destination. The city centre itself is situated at the heart of the City of Cambridge and the city centre boundary extends across a wide area, divided by local planning policy into two distinct sectors: the Historic Centre and the Fitzroy-Burleigh area which includes the Grafton Centre. The total floorspace of Cambridge City Centre including the Grafton Centre is 92,479 sqm net.

2.4 The Grand Arcade is Cambridge's most recent addition to shopping provision in the historic part of the City and comprises a two-level arcade and functional covered thoroughfare between St Andrew's Street and Lion Yard. The centre, anchored by John Lewis, opened in 2008 comprising a total retail floorspace of approximately 41,805 sqm gross across 52 units largely dedicated to a higher quality retail offer which includes designer retailers All Saints and Gerry Weber.

2.5 The Grafton Shopping Centre opened in 1983 but has since been extended twice in 1995 and 2005 and currently comprises approximately 38,460 sqm gross retail floorspace. In contrast to the historic part of the City, the retail offer at the Grafton Centre has more emphasis on mainstream fashion with retailers Debenhams and Bhs occupying the anchor stores. The centre is more family-orientated and there is a leisure element which includes an eight-screen Vue cinema and restaurants and cafes such as Bella Italia and Costa Coffee.

2.6 There are currently no published developments in the pipeline. However Cambridge is likely to continue to dominate the sub regional retail hierarchy.

Peterborough

2.7 Peterborough is a major regional centre situated approximately 64km to the north west of Ely. Peterborough city centre is relatively compact with a total retail floorspace of 144,000 sqm gross. Approximately 54% of this is concentrated within three shopping centres, with the remainder distributed along the surrounding pedestrianised streets.

2.8 The largest of the three shopping centres is the centrally located Queensgate Centre which originally opened in 1982 and comprises c.74,973 sqm gross floorspace across two floors. The centre is anchored by a three-floor John Lewis department store. There is also a large Marks & Spencer, Bhs and Argos Extra as well as key multiple high-street retailers H&M, Topshop, River Island, Boots and Superdrug.

2.9 The remaining two shopping centres are less prominently located. The Hereward Cross Centre, previously a 1960s arcade which was remodelled in 2006 is situated to the north of the central shopping area and away from the pedestrianised zones. The centre comprises c.7,896 sqm gross floorspace over 14 units. The Rivergate Centre is situated towards the southern fringe of the town centre in a more secondary location. The centre comprises c.11,148 sqm gross floorspace within a mall of shop units.

2.10 Future plans include a further extension to the Queensgate Centre proposing an additional 68,000 sqm retail floorspace incorporating retail, entertainment and leisure uses.

2.11 It is likely that Peterborough will continue to be a major shopping destination for residents of East Cambridgeshire.

King’s Lynn

2.12 King’s Lynn is located approximately 45 kilometres to the north of Ely along the A10. The centre is defined as a sub regional centre. King’s Lynn is a relatively compact centre with a retail floorspace of approximately 96,684 sq m.

2.13 The core retail area is concentrated on High Street, where the majority of multiple retailers are located. These include HMV, River Island, Laura Ashley, Next and Marks & Spencer. The town also has two department stores, Littlewoods and Westgate.

2.14 The town has recently benefited from a £26 million extension and improvement to the Vancouver Centre, adding approximately 15,500 sqm of additional retail floorspace to the centre served by a new multi-storey car park and improvements to the bus station. This has had a positive impact on market interest in the town helping to reinforce Kings Lynn’s role in the wider sub region.

2.15 There are no currently published developments in the pipeline. However King’s Lynn is likely to continue to draw residents from East Cambridgeshire to its retail core.

Bury St Edmunds

2.16 Bury St Edmunds is a major town centre located approximately 40km to the east of Ely. The centre caters for an extensive and largely affluent population and its retail offer reflects this.

2.17 The redevelopment of Bury St Edmunds Cattle Market completed in 2009 has provided 35 new retail units anchored by Debenhams department store. The Arc development has added circa 24,618 sqm of floorspace with a number of national multiple retailers including River Island, Next, Fat Face, HMV, Waterstone and Vodafone taking space.

2.18 The traditional Bury St Edmunds' retail provision is distributed along the town's main high streets extending south from Cornhill Walk shopping centre with a mix of national multiples and independent shops including Marks & Spencer store and an Iceland foodstore. The retail offer is supplemented by a range of food and drink establishments and service operators.

2.19 Bury St Edmunds is a popular centre with a strong draw for East Cambridgeshire's catchment area.

Newmarket

2.20 Situated approximately 21km to the south east of Ely, the market town of Newmarket is built along a main 'spine route' with the main heart of the retail offer along the High Street. The total retail floorspace in Newmarket is 38,182 sqm gross.

2.21 The Guineas Shopping Centre provides the main additional retail provision in Newmarket. The purpose built covered Shopping Centre opened in December 1974 and has a retail floorspace of approximately 9,290 sq m gross. The shopping centre contains a good selection of national multiples, including Holland and Barrett, Superdrug, Argos, Clarks, Adams, Carphone Warehouse, Peacocks and Marks & Spencer.

2.22 There is currently an existing permission, granted in April 2008, to extend the Guineas Centre to include a 1,486 sqm retail unit and six kiosk style retail units.

2.23 Newmarket is likely to continue functioning as a medium sized market town, serving its immediate population. Possible developments coming forward are unlikely to significantly alter its influence in the Cambridge sub region in the future.

Huntingdon

2.24 Situated approximately 45km to the west of Ely, the market town of Huntingdon comprises a linear centre contained within the B1514 ring road. The total retail floorspace in Huntingdon is 38,280 sqm gross arranged along the pedestrianised High Street and within three managed shopping centres.

2.25 The largest of Huntingdon's three shopping centres is the 11,148 sqm St Germain Walk which opened in 1999 and presently comprises seven units anchored by a 4,550 sqm Sainsbury's foodstore and a 1,860 sqm gross Wilkinson store. The remaining units are occupied by multiple retailers such as Peacocks, Gilesports, Superdrug, Millets and the Post Office.

2.26 A second shopping centre, Chequers Court sits adjacent to St Germain Walk. Chequer's Court originally opened in 1962 and most recently underwent an extension in 2007. The centre comprises a number of relatively small units which amount to a total floorspace of 5,945 sqm gross. Retailers in the centre include a mix of independent and multiple operators such as Clinton Cards, Julian Graves, Starbucks and Bakers Oven. The third shopping centre in Huntingdon is St Benedict's Court situated to the south of High Street anchored by a Waitrose foodstore.

2.27 There are currently 2 planning applications pending consideration for major retail development in the town that would add 7,308 sqm of A1 space with the redevelopment of Chequers Court and the relocation of Sainsbury's to an edge of centre site.

2.28 Huntingdon is likely to continue functioning as a medium sized market town, serving its immediate population. Possible developments coming forward are unlikely to significantly alter its influence in the Cambridge sub region in the future.

3 REVIEW OF MARKET TOWNS AND LOCAL CENTRES

3.1 In order to assess the vitality and viability of our market towns we have undertaken healthchecks for Ely, Soham and Littleport. The healthchecks look to build up a picture of the town centres performance to give a more comprehensive understanding of their strengths and weaknesses. This section will also update the local centres assessment across 8 villages within the district.

Ely City Centre Healthcheck

3.2 Ely is the primary shopping, leisure and service centre for the East Cambridgeshire District. Located approximately 29km north of Cambridge, Ely is relatively well connected to Cambridge and beyond via rail, the A10, and the A14. The compact historic city centre is a key tourist destination with Ely Cathedral attracting around 150,000 paying visitors each year.

3.3 The city centre at the heart of the city is focused along the High Street, Market Street, Market Place and the Cloisters shopping precinct. The Cathedral Quarter complements the core shopping area and leisure facilities can be accessed within the Paradise area adjacent to the Cloisters.

3.4 In order to provide a comprehensive health check of the city we have combined qualitative and quantitative measures to assess strengths, weaknesses, opportunities and threats.

3.5 The city centre primary shopping frontage is focused along the High Street, Market Place and within the Cloisters shopping precinct.

3.6 The city centre can be sub-divided into individual areas, which make up the overall Ely city centre 'offer'. Each area makes a distinct contribution to the town centre uses and experience.

3.7 The High Street is characterized by a mix of independent and national retailers. Key attractors include Argos, New Look, Carphone Warehouse and Clinton Cards, alongside local independent retailers such as Topping & Co bookshop, Ely Cathedral Shop and James Cox menswear. The High Street also plays a key role in the city centre leisure provision with an increasingly strong cluster of café and restaurant uses including national chains such as Starbucks, Pizza Express, Prezzo and Caffe Nero. In total 10 units offer a café, restaurant, sandwich or takeaway option.

3.8 The Cloisters is home to a number of multiple retailers providing larger floorplates and modern retail premises. The development, opened in 1997 comprising some 6,224 sq m across 20 units. Anchored by Waitrose, the Cloisters has a number of key city centre attractors including Wilkinsons, Dorothy Perkins, Iceland and Sports Direct.

3.9 The Market Place provides a dual role as a civic square with weekly markets alongside national multiples such as M&Co, Nationwide and Ladbrokes. The market place has a strong concentration of A2 uses accounting for around 30% of available units.

3.10 Market Street runs adjacent to the High Street with a dual offer split alongside an east/west divide with major national multiples located east of Newnham Street and independent retailers and other town centre uses to the west of Newnham Street. The eastern part of Market Street has key attractors such as Superdrug, Boots, Fat Face, and WH Smith. The majority of retail units provide large floorplates for A1 use and are an important component of the primary shopping frontage linking into the market place and the Cloisters shopping precinct.

3.11 The western part of Market Street falls within the secondary shopping frontage and as such plays a different role to the eastern units. The majority of units are predominantly taken up by non-A1 uses with two public houses, four restaurants, alongside cafes and takeaways.

3.12 Forehill, as part of the secondary retail frontage is home to a large proportion of independent traders with a strong presence of health, beauty and hair salons providing a strong personal service offer for the city centre, alongside a cluster of A2 financial and business services firms. With Sainsbury's opening a new store on Lisle Lane in February 2012 Forehill will become a pedestrian link from the city centre to the new store.

City Centre Uses

3.13 The Experian Goad Town Centre Report (March 2011) provides an evidence base for an overview of Ely city centre. The report identifies a total of 370,200 sq ft of floorspace, across 200 outlets. Table 1 below shows the breakdown of total floorspace by Comparison, Convenience, Service, Vacant and Miscellaneous uses.

Table 1: Breakdown of Ely City Centre Floorspace by use class

	Floorspace (Sq ft)	% of Total Floorspace	UK Average (%)
Comparison	164,400	44.41	36.88
Convenience[1]	38,500	10.40	14.25
Retail Service	29,300	7.91	7.08
Leisure Service	78,600	21.23	22.67
Financial & Business Services	47,000	12.72	8.37
Vacant	12,300	3.32	10.02

Source: Experian Category Report (2011)

3.14 The above table shows that Ely is well served in terms of the percentage of comparison retailers with 44.4% of the total floorspace taken up by comparison retailers compared to the national average of 36.8%.

3.15 Strong competition also exists within the convenience sector. Although the Experian Goad breakdown shows the town centre convenience floorspace

[1] The convenience floorspace figure does not include the out of town Tesco store (3,048 sq m) or the new Sainsbury's store that opened in February 2012, which will add 4,314 sq m.

beneath the UK average at 10.4% compared to 14.2% this does not accurately reflect the full picture. The new Sainsbury's store which opened in February 2012 (an edge of centre site) brings the total convenience floorspace to 20.4%, and if the out of town Tesco store is included, total convenience floorspace is 26.2%.

3.16 Ely ranks below the national average within leisure provision (Table 1). This is particularly prevalent amongst Hotels & Guest Houses (index=82), public houses (index=86), and restaurants (index=92). The increase in non retail A1 uses within the new entrants to the city centre between the ECDC retail survey in 2010 and 2011 can be seen in the data for cafes with an index rating of 143 well above the national average.

3.17 The city centre is well catered for in terms of financial and business services offer (Table 1). Financial services (index=183), other business services (Index=243) and property services (index=160) are all well above the national average (index=100). The above business service categories contribute to strong competition in the city centre with 14% financial and business services floorspace coverage, well above the 10.93% national average. For the full breakdown of Ely City Centre uses see Appendix 2.

Diversity of uses & retailer representation

3.18 The breakdown of the floorspace totals within the Experian category classification show that in the comparison sector within Ely there is an above average representation (Index: 150+) in 12 comparison uses including strong representation in Antiques (246), Art (296), Books (273) and textiles & soft furnishings (204). (Table 2)

Table 2: Goad Comparison Use City Centre Representation

Above Average Representation	Index	Below Average Representation	Index
Antique Shops	246	Childrens & Infant Wear	0
Art & Art Dealers	296	Department & Variety Stores	0
Booksellers	273	Furniture Fitted	0
Catalogue Showrooms	348	Gardens & Equipment	0
Clothing General	164	Leather & Travel Goods	0
Cycles & Accessories	219	Music & Musical Instruments	0
Footwear	165	Music & Video Recordings	0
Hardwear & Household Goods	176	Office Supplies	0
Ladies Wear & Accessories	167	Photographic & Optical	0
Secondhand Goods, Books etc	204	Telephones & Accessories	42
Sports Camping & Leisure Goods	184	Vehicle & Motorcycle Sales	0

Textiles & Soft Furnishings	204	Vehicle Accessories	0

Source: Experian Category Report (2011)

3.19 There are 11 comparison uses with zero representation including childrens & infant wear, fitted furniture, gardens & equipment and office suppliers. The below table sets out the numbers of national multiple retailers within Ely city centre based upon the Experian definition of a ‘national multiple’.

Table 3: Multiple Counts & Floorspace by Sector

Floorspace Sq ft	Units	Outlets	Area %	Base %	Index
Comparison	31	96,300	54.31	48.20	113
Convenience	5	30,300	17.09	21.82	78
Retail Service	9	11,700	6.60	4.99	132
Leisure Services	7	18,200	10.27	16.05	64
Financial & Business Services	10	20,800	11.73	8.94	131
Total Multiple Floorspace	62	177,300			

Source: Experian Category Report (2011)

3.20 The East Cambs Retail Survey (2011) found that there was a 68.5/31.5% split between the independent sector and recognised national ‘chain’ retailers.

3.21 The independent sector complements the tourism offer within Ely. Independent shops such as Toppings & Co bookstore, Cherry Hill Chocolates and Bent and Cornwall Quality Meats add a local flavour to the retailers providing a distinct offer for the city centre.

Markets

3.22 There is also a regular market in Ely which enhances the overall retail offer. A general market is held weekly on a Thursday, with approximately 60-65 stalls. There is also a craft and collectibles market held weekly on a Saturday with approximately 45 stalls. In addition to this craft and collectibles market on Saturday, every 1st and 3rd week of the month, there is a general market (approximately 20 stalls), and every 2nd and 4th week of the month there is a Farmers market (approximately 25 farmers). Specialist markets complement the regular schedule on an occasional basis.

Vitality and Viability

3.23 The Management Horizons Europe Shopping Index 2008 ranks Ely as a District Centre. The index ranked the UK’s top 6,720 centres. In order to assess the vitality of Ely as a shopping centre we tracked the city’s ranking over the past 5 years. Between 2003/04 and 2008 Ely’s ranking fell 57 places from 367 to 424.

Table 4: Ely City Centre Shopping Rents and Yields

Centre	2000	2005	2011
Rents	£463 per sqm	£590 per sqm	£543 per sqm
Yields	8%	7%	7%

Source: Local commercial agents

3.24 The primary shopping area rents in Ely climbed steadily until 2005. Since then the growth has slowed and prime rents have fallen from £590 per sqm to £543 per sqm. In comparison prime rents within Cambridge are £2,475 per sqm, over 4 times the rents realised within Ely.

3.25 Yields within Ely have fallen slightly from a peak of around 8% in 2000 to 7% in 2005 and 7% in 2011.

Vacant Retail Property

3.26 At the time of the 2011 ECDC Retail Survey 9 vacant units were identified within the city centre (Aug 2011), which equates to a vacancy rate of 3.7% and is below the regional and national average of 8.3% and 11.1% respectively.

3.27 Since the survey was undertaken a further three units have become available within the city centre. The vacant town centre units are evenly distributed across the main shopping areas with units on the High Street, Market Place, Forehill and High Street Passage.

3.28 Although the headline rate of the Ely retail vacancies is comparatively low compared to the national average, the natural churn of the city centre may indicate that the centre has not been immune from the effects of the downturn and increased competition from Internet retailers and the sub-region and regional competitor centres. The ECDC retail survey 2011 showed that there were 14 different occupiers from the previous year's survey.

3.29 Five of the 14 differing uses were taking on empty units, eight replacing businesses trading in 2010 and one taking on a part let of an existing shop. Twelve of the new shops are independent traders, however 9 of the new occupiers fall outside the A1 use class. The majority of businesses lost to the town centre between 2010 and 2011 were independent traders.

Pedestrian Flows

3.30 A pedestrian flow survey of Ely was undertaken by PMRS in June 2010. The results reveal that the highest levels of pedestrian flows within the city centre occur within the Cloisters development. This is consistent across all the pedestrian flow surveys conducted in Ely with multiple national retailers, the library and Waitrose as the anchor store attracting a strong flow of pedestrians. The lowest levels of pedestrian flow were found within the secondary shopping areas around Forehill and Newnham Street. Within the primary shopping area Market Street showed the weakest pedestrian flows.

Retailer Requirements

3.31 We have spoken to a range of local and sub regional agents in order to assess and confirm demand for retailer requirements within the city centre.

The below table sets out the requirements sizes and businesses interested in taking space within Ely.

Table 5: Retailer requirements for Ely City Centre

Retailer	Size (sq ft)	Requirement Date
Poundstretcher	4,000-6,000	26/09/11
The Children's Society	c.1,000	22/09/11
Majestic Wine	2,000-8,000	22/09/11
The Original Factory Shop	6,000-15,000	01/09/11
Dignity Funerals Ltd	900-1,500	22/08/11
Farm Foods	6,000-8,000	07/07/11
Scope	600-1,000	27/05/11
Speedy Cash	500-2,000	23/05/11
Subway	500-2,000	15/02/11
Betfred	1,000-2,000	07/02/11
Store Twenty One	3,000-7,000	12/01/11

Source: Local commercial agents

3.32 The majority of requirements are from comparison retailers with two charity stores, two discount clothing stores and a discount household goods store. Alongside this mainly discount store comparison demand there is interest for A2 (Betfred) and A5 uses (Subway). In total circa 25,000 sq ft of retailer requirements have been identified within 2011.

Planning Applications

3.33 In February 2012 Sainsbury's opened a new foodstore in Ely. The Sainsbury's Planning and Retail Statement (June 2009) estimates that with a net sales area of 4,314 sq m the store is expected to achieve a turnover of £42.7m. Sainsbury's estimate a 75:25 convenience/comparison split would see a convenience/comparison goods turnover of £32.m and £10.7m respectively. Consent has also been given for Aldi to build a new 1,570 sqm foodstore on Lisle Lane in Ely.

3.34 Following a statement in Oct 2011 it is also expected that Tesco are looking at options to upgrade their existing store in a new location within the Angel Drove area of Ely. At the time of writing, an application has not yet been received.

Ely Masterplan Opportunity sites

3.35 The Ely Masterplan adopted in Feb 2010 set out plans to maximise the potential of opportunity sites within the historic city centre in order to provide additional shopping floorspace, leisure/cultural facilities and central high density residential accommodation.

3.36 Redevelopment of the Cloisters/Market Place, Paradise Quarter and the Nutholt Lane/District Council Offices site would offer opportunities to bring additional people into the city centre, encourage a more lively evening economy as well as a more viable retail offer.

Accessibility

3.37 Accessibility to the centre by public transport – The train station is located approximately 1 mile from the centre of Ely. There are 12 bus services which serve Ely, connecting the centre with Cambridge, and the surrounding villages. The bus stops in the central shopping centre are located in Market Street close to the prime retail zone. Five of the bus services are only operational on market day (Thursday). ESDAR Dial a ride services provide regular city centre visits for those without access to a car and unable to use bus services.

3.38 Accessibility to the centre by private transport – Ely is very accessible by private transport, located at the junction of the A10 with the A142. There is limited car parking provision located at public car parks which is currently free, providing 902 short stay spaces (2-4hr parking), and 390 long stay spaces. Several of these car parks are located approximately 2 minutes walk from the central shopping area; others are located in excess of a 2-minute walk from the central shopping area. There is also on street car parking provided on High Street and Market Street which is at the heart of the central shopping area, although this is time limited. Sainsbury's new store has added 470 additional parking spaces within an edge of centre location.

3.39 Provision is made for bicycles, with bicycle racks placed in central locations, on Market Street and High Street Back. Taxi ranks are located on the Market Place and on Market Street.

3.40 Whilst the car parking is well located in relation to the town centre it does become congested at peak times, primarily on market days and Saturdays, leading to an increase in traffic congestion as people drive around to find a parking space. A survey undertaken for the Ely Masterplan underpins the importance of car journeys with 81% of respondents typically using a car to travel around East Cambridgeshire. The shoppers survey undertaken as part of the Roger Tym and Partners retail study for ECDC in 2005 showed that travel to Ely was predominantly by private car (57%) although a large proportion also walk.

Table 6: Ely City Centre Car Park Occupancy

	Wednesday		Saturday	
Car Park	AM	PM	AM	PM
St Mary's Street Short Stay	100%	65.22%	100%	100%
Newnham Street Long Stay	100%	100%	100%	100%
Newnham Street Short Stay	90.55%	55.91%	100%	100%
Forehill Short Stay	25.72%	51.09%	87.32%	100%
Barton Road Long Stay	76.92%	69.23%	100%	100%
Ship Lane Long Stay	100%	100%	88.89%	100%

Source: ECDC Survey Wednesday 25th January 2012 & Saturday 28th January 2012 in calm weather conditions. AM: 10am PM: 2pm

Environmental Quality

3.41 Ely is a compact city, with exceptional examples of ecclesiastical architecture found within the cathedral complex. The medieval town layout is still clearly visible, along with many high quality Georgian and early 19th century buildings. They all combine to create a city that is both interesting to visit, and enjoyable to live in.

High Street

3.42 The unique historic nature of the centre of Ely is particularly apparent on the High Street, which runs parallel to the Cathedral Close. The High Street has a number of traditional and historic shop units many of which have retained traditional frontages, and the Cathedral itself dominates the skyline, creating an impressive backdrop. There are 10 listed buildings on the High Street (some of which are subdivided into a number of smaller units), the majority of which are Grade II which maintain this historic environment. Chequer Lane and High Street Back, which link High Street and Market Street are small pedestrian lanes, lined with shops, which give the shopping environment more interest and increase the permeability of the retail core.

Market Street

3.43 Market Street is characterized by a mixture of traditional and modern retail units and there are 8 listed buildings (Grade II), some of which have been subdivided into a number of smaller units, which add to and maintain the historic environment. The streetscape improvements undertaken in Market Place and the eastern part of Market Street in 2002 have enhanced the shopping environment with new street furniture such as benches and dustbins, paving and traditional style street lighting which is in keeping with the historic environment. However, the market place can look sparse in adverse weather conditions and non market days.

3.44 This contrasts with the western part of Market Street which has not been enhanced in this way, and is considerably busier due to the bus stops and traffic. There is a recently refurbished building on the corner of Market Street and High Street Back which now offers a new retail space.

3.45 The small Cloisters shopping centre which is located off Market Street is of good quality, provides a modern shopping environment and includes the community facility of a library. Building storey height is of a scale that is in keeping with the rest of the retail units in Ely, although the floorspace for some of the units is somewhat bigger than those retail units on High Street and Market Street, accommodating a large supermarket (Waitrose) and other national multiple retailers which have large floorspace requirements.

Forehill / St Mary’s Street / Minster Place

3.46 Forehill is located east of Market Place and High Street, sloping downhill from High Street. It is located on the fringes of the main shopping core. The pavements are wide creating a comfortable environment for pedestrians, although there are no pedestrian crossing points. There are seven Grade II listed buildings on Forehill which reinforce the historic character of the environment, and the majority of the shops have traditional frontages. The

2011 retail survey showed just one empty unit on Forehill. With no national multiple retailer representation this secondary shopping area relies entirely on independents and niche retailers.

3.47 St Mary's Street is located west of High Street. The shop units are small and traditional, and the historic nature of the street is reflected in the large number of Grade II listed buildings (32), although none of these are in the eastern most part of the street where the retail units are clustered. The junction of St Mary's Street with High Street and Minster Place is busy with traffic, although there is a pedestrian crossing point. Again the location of the street on the fringes of the central shopping area, and the lack of multiple retailer representation, means that it is not as attractive to shoppers as other parts of the shopping area. There is also one retail unit on Minster Place, located around the corner from the main parade of shops on High Street.

Customer Views and Behaviour

3.48 The Visitors' Survey undertaken in Ely in March 2005 provides information on the views and behaviour of visitors to the town. For a summary see below:

- food shopping accounts for just over 20% of the respondents' reasons for visiting Ely; other forms of shopping account for a slightly higher proportion of respondents: 28%;
- Ely visitors are relatively local to the centre, with food shoppers travelling less than 20 minutes;
- Non-food shoppers also travel 20 minutes or less with only a small proportion (10%) of visitors travelling more than 30 minutes;
- Those shoppers that use other services are most likely to use the library;
- Travel to Ely was predominantly by private car (57%) although a large proportion also walk (29%);
- For shoppers in Soham and Littleport, Ely is their other most visited centre;
- For shoppers in Ely, they are most likely to visit Cambridge as their other most visited centre;
- Ely is used by shoppers because of its proximity and ease of access to home and work; rather than positive attributes such as environmental quality.

Soham Town Centre Healthcheck

3.49 Soham has a rich history as a market town, evident today in the quality of its historic centre and the commons in the heart of the town. Soham is a secondary shopping, leisure and service centre within East Cambridgeshire District. Located approximately 31km northeast of Cambridge, Soham is relatively well connected to Ely and Newmarket, with easy local access to the nearby villages of Isleham, Fordham, Burwell and Wicken, the A142, and the A14.

3.50 The centre of the town is focused along the High Street providing the main concentration of retail community and commercial uses. The retail offer is complemented by a recreation park, church, library and commercial units within the main core of the market town.

3.51 In order to provide a comprehensive health check of the town we have combined qualitative and quantitative measures to assess strengths, weaknesses, opportunities and threats.

3.52 Soham's main shopping area is focused along a traditional linear high street. Soham's centre can be sub-divided into individual parts, which make up the overall Soham market town 'offer'. Such areas include High Street, Churchgate Street and Clay Street.

3.53 The High Street is characterised by a number of traditional and historic shop units occupied with a majority of independent retailers, alongside a small number of nationals and key attractors including Co-op, Lloyds Pharmacy, Barclays Bank and Blockbuster.

3.54 The Churchgate Street offer is predominantly service retail led with a strong independent offering across hair, beauty, restaurants and cafes. This part of Soham is anchored by Lloyds Bank and the Church of St Andrews.

3.55 Clay Street is anchored by a Budgens store providing predominantly top up shopping for the Soham population catchment.

Town Centre uses

3.56 The East Cambs District Council Retail Survey 2011 provides an evidence base for the overview of the Soham town centre. The survey identifies a total of approximately 12,000 sq m of gross floorspace within Soham shopping area. The majority of this space falls within the A1 to A5 use classes with around 7,800 sqm gross.

Table 7: Breakdown of retail uses within Soham town centre

	Outlets	% of Total Outlets	UK Average (%)
Comparison	11	18	33.27
Convenience	8	13	8.11
Retail Service	16	26	13.34
Leisure Service	15	25	21.83
Financial & Business Services	9	15	10.93
Vacant	2	3	12.18

Source: East Cambridgeshire Retail Survey 2011

3.57 The above table shows that Soham is well served by convenience retailers with eight units across the town centre (13%) compared to 8.11% nationally. The town centre has an above average representation in retail service (26% compared to 13.34% nationally) and financial and business services (15% compared to 10.93% nationally)

3.58 Soham falls well below the national average for comparison retailing with just 18% of units compared to a national average of 33.27%.

Diversity of uses & retailer representation

3.59 The breakdown of the retail classification representation (Table 8) shows that within Soham the town centre is well represented within the health & beauty sector with 10 units predominantly made up of hair salons. The centre also has an above average number of cafes, takeaways, public houses and dry cleaners & launderettes.

3.60 The strong showing of business services within the centre is seen with above average representation of financial services, retail banks and other business services.

Table 8: Soham Town Centre Retail Classification Representation

Above Average Representation	Area %	UK %
Health & Beauty	16.2	7.55
Cafes	8.2	3.84
Fast Food & Take Away	6.5	5.40
Public Houses	4.8	2.91
Convenience Stores	4.8	1.15
Dry Cleaners & Launderettes	4.8	0.85
Financial Services	3.2	1.36
Other Business services	3.2	0.41
Supermarkets	3.2	0.88
Retail Banks	3.2	2.69

Source: East Cambridgeshire District Council Retail Survey 2011

3.61 There are 9 shops within the Experian Goad comparison sector classifications with single representations. These are; bookseller, charity shop, chemist, gift, cycles, DIY, florist, furniture and vehicle sales classifications alongside two household goods stores. There are 30 Experian Goad comparison sector classifications that Soham currently has no representation in. (For a complete list please see appendix 3, table 3.3)

3.62 The East Cambs Retail Survey (2011) found that there was a 76.3%/23.7% split between the independent sector and recognised national ‘chain’ retailers. Soham has a larger proportion of independent retailers than Ely reflecting its secondary shopping role within the retail hierarchy. At present, Soham does not contain a market which would attract independent traders and additional footfall within the town centre.

Vitality and Viability

Table 9: Soham Town Centre Shopping Rents & Yields

Soham	2005	2011
Rents	£215 per sqm	£188 per sqm
Yields	6%	6%

Source: Local commercial agents

3.63 The prime rents in Soham are currently achieving top rents of around £188 per sqm. Prime rents within the town centre have fallen since 2005 from £215 per sqm to their current levels. This is less than half the prime rents achieved within Ely reflecting the size and types of stores available within Soham.

3.64 Letting agents have indicated that it may be possible to achieve yields in the order of 6% but this only relates to the largest units within the prime shopping area. The smaller units within Soham would not be comparable in terms of yields achieved.

Vacant Retail Property

3.65 The East Cambs Retail Survey found that there were 2 vacant units within the town centre, which equates to a vacancy rate of 3.27% and is below the national average of 11.1%. The vacant units are based on Churchgate Street. Since the survey was undertaken in August 2011 a further unit has become available on the High Street.

3.66 Although the headline rate for Soham is comparatively low compared to the national average, there has still been significant churn within the town centre with five new entrants in the 2011 retail survey compared to the previous survey in 2010. The five new entrants to the Soham retail offer are all independent retailers with no national multiples showing interest in taking up space within the town centre.

Pedestrian Flows

3.67 A pedestrian flow survey of Soham was undertaken by PMRS in June 2010. The results reveal that the highest levels of pedestrian flows within the town centre occur in the High Street outside the Co-op and on Churchgate Street outside Lloyds Bank. The lowest levels of pedestrian flow were found on the edge of the town centre reflecting the linear nature of the Soham High Street layout with few pedestrian shopping loops.

Retailer Requirements

3.68 Local agents within the area have indicated that they are not aware of any specific requirements for the town centre, but state that any requirements that may come forward, are likely to be from local, independent traders.

Planning Applications

3.69 An application from James Graven Ltd to extend the existing Budgens food store by approx 802 sqm.[2] A decision on this application is expected in May 2012. Interest has also been shown for a new out of town supermarket development in the Northern Gateway into Soham.

Soham Masterplan Opportunity Sites

3.70 The Soham Masterplan adopted in May 2010 sets out the strategic approach to regenerating Soham's town centre, enabling services and facilities to be re-established and maintained. Regeneration of the High Street, Backlands East & West with new links to Budgens and a new town park would offer opportunities to bring additional people into the town centre, encourage leisure and community uses as well as a more viable retail offer.

Accessibility

3.71 Accessibility to the centre by public transport – There are three bus services serving Soham, connecting the town with Ely, Newmarket and Cambridge, of which one service only runs on one day each week. The bus stops within the town centre are located on the High Street within the prime retail zone.

3.72 Accessibility to the centre by private transport – Soham is accessible by private transport, being located on the A142, the main route between Ely and Newmarket. Car parking provision is relatively plentiful for the size of the town centre and is free of charge. There are some 63 long stay spaces. The long stay spaces are located within a car park on Fountain Lane and Clay Street, both of which are approximately 50m from the main High Street. Short stay spaces, enabling a stay of up to 30 minutes, are provided by way of on-street parking located primarily along the High Street. There is also car parking provided for customers at the Co-op (approximately 10 spaces). Provision is made for bicycles, with racks in a central location on the High Street.

Table 10: Soham Town Centre Car Park Occupancy

	Wednesday		Saturday	
Car Park	AM	PM	AM	PM
Clay Street, Long stay	88.24%	73.53%	73.53%	50%
Fountain Lane, Long stay	96.15%	53.85%	100%	65.38%

Source: ECDC Survey Wednesday 25th January 2012 & Saturday 28th January 2012 in calm weather conditions. AM: 11am PM: 3pm

3.73 Accessibility within the centre – There are no pedestrianised streets within Soham town centre, although wide pavements along much of the eastern side of the High Street provide for a comfortable pedestrian environment. However, improvements to the width of pavements would be of benefit on the western side of the High Street and Churchgate Street. Whilst the High Street has two-way traffic flows and on-street parking, traffic speeds tend to be relatively slow, enabling pedestrians to cross the street with reasonable ease. This is assisted by a pelican crossing outside the Co-op, one of the town's key attractors. A pedestrian route is also provided between the High Street

[2] The application for an extension to the Budgens in Soham was approved in May 2012 by ECDC.

and the Budgens foodstore which is located behind the High Street on Clay Street.

Environmental Quality

High Street

3.74 This street provides the heart of the town and is characterised by a number of traditional and historic shop units. The Grade II listed Red Lion Public House provides an attractive focal point to the High Street. The church and war memorial located at opposite ends of the street provide a historic back-drop to the area. This street is not pedestrianised, but nevertheless provides a relatively attractive shopping environment. This is particularly the case towards the northern end of the High Street where the setting of the Grade I Listed Church of St Andrews contributes to a more open environment.

Customer Views and Behaviour

3.75 The Visitors' Survey undertaken in Soham in March 2005 provides information on the views and behaviour of visitors to the town and we summarise the key findings below:

- the majority of visitors travel less than 20 minutes to come to the centre, and the highest proportion (50%) walk, although private car also accounts for a significant proportion of journeys (37%);
- the majority of visitors to Soham did not encounter any problems on their journeys although for those that did have difficulties traffic congestion was cited as the main problem;
- visits to Soham centre are more frequent than visits to Ely with more than 80% of respondents coming more than once a week; these frequent visits are also short as 60% of respondents intend to stay less than 30 minutes;
- Improvement to the pedestrian environment was particularly highlighted as an improvement that could be made to the centre.
- the main purpose of respondents' visits to Soham is food shopping in a supermarket or other shops;

Littleport Town Centre Healthcheck

3.76 Littleport is a rural community situated on the A10 route some 8 kilometres north of Ely and 33 kilometres from Cambridge. Littleport serves the need of a very localised rural catchment area. The town centre is small and compact, with a limited offer and no regular market.

3.77 The centre of the town is focused along Main Street providing the main concentration of retail and community uses. The retail offer is complemented by a library and village hall within the main core of the market town.

3.78 In order to provide a comprehensive health check of the town we have combined qualitative and quantitative measures to assess strengths, weaknesses, opportunities and threats.

3.79 Littleport's main shopping area is focused along a traditional linear road. Main Street is characterised by a number of traditional and historic shop units with a majority of independent retailers, alongside a small number of nationals and key attractors including Co-op, Lloyds Pharmacy and Barclays Bank. Additionally Wisbech Road provides an out of town location for a larger new Co-op which opened in late 2010.

Town Centre uses

3.80 The East Cambs District Council Retail Survey 2011 provides an evidence base for the overview of the Littleport town centre. The survey identifies a total of approximately 6,250 sq m of gross floorspace within Littleport shopping area. The majority of this space falls within the A1 to A5 use classes with around 4,450 sqm gross. (71% of floorspace) Nearly a quarter of the total floorspace (around 1,485 sqm) is in ‘other’ use, such as community or residential uses.

Table 11: Breakdown of retail uses within Littleport town centre

	Number of Units	% of Total Units	UK Average (%)
Comparison	11	31	33.27
Convenience	5	14	8.11
Retail Service	6	17	13.34
Leisure Service	8	23	21.83
Financial & Business Services	3	9	10.93
Vacant	2	6	12.18

Source: East Cambridgeshire District Council Retail Survey 2011

3.81 The above table shows that Littleport is well served for convenience shopping with an above average representation of 14% of units compared to 8.11% nationally. Littleport is relatively balanced across convenience, retail services, leisure services and financial & business services with around an average number of units occupied in each of the sectors.

Diversity of uses & retailer representation

3.82 The breakdown of the use representation based on the Experian town centre classification shows that within Littleport the town centre is well represented within the health & beauty and fastfood & takeaway sector with 5 units within each sector. The health and beauty units are predominantly made up of hair salons. The centre also has an above average number of bakers & confectioners and crafts & gift shops.

Table 12: Littleport Town Centre Retail Classification Representation

Above Average Representation	% of Total Outlets	UK %
Health & Beauty	14.2	7.55
Fast Food & Take Away	14.2	5.40
Bakers & Confectioners	5.8	1.78
Crafts, Gifts, China & Glass	5.8	1.46

Source: East Cambridgeshire District Council Retail Survey 2011

3.83 There are 9 shops within the Experian comparison sector classifications with single representations and a further 28 comparison sectors classifications that Littleport currently has no representation in. (For a complete list please see appendix 3, table 3.4)

3.84 The East Cambs Retail Survey (2011) found that there was an 84.8/15.2% split between the independent sector and recognised national 'chain' retailers. Littleport has a larger proportion of independent retailers than both Ely and Soham reflecting its secondary shopping role within the retail hierarchy and challenges faced by the town centre. There is not currently a market within the Littleport town centre.

Vitality and Viability

3.85 The prime rents achieved within Littleport have shown little change since 2005 with current rents of around £161 per sqm. This is less than the rents achieved in Soham and over three times less than seen in Ely.

Table 13: Littleport Town Centre Shopping Rents & Yields

Littleport	2005	2011
Rents	£160 per sqm	£161 per sqm
Yields	6%	6%

Source: Local commercial agents

3.86 Letting agents have indicated that it may be possible to achieve yields in the order of 6% but this only relates to the largest units within the prime shopping area. The smaller units within Littleport would not be comparable in terms of yields achieved.

Vacant Retail Property

3.87 The East Cambs Retail Survey (2011) found that there were currently two available units within the town centre, which equates to a vacancy rate of 5.71% and is below the national average of 11.1%. The vacant units are based on the main shopping street. Since the survey was undertaken in August 2011 a further two units have become available.

3.88 Although the headline rate for Littleport is comparatively low compared to the national average the town centre struggles to attract new retailers and units have been converted into residential use (the latest 25 Main Street) resulting in a lower vacancy rate than may have been the case.

Pedestrian Flows

3.89 A pedestrian flow survey of Littleport was undertaken by PMRS in June 2010. The results reveal that the highest levels of pedestrian flows within the town centre occur on Main Street outside the Co-op and McColls Newsagent. The lowest levels of pedestrian flow were found on the edge of Main Street outside Clarke's Menswear and on Crown Lane outside the Gulf Garage.

Retailer Requirements

3.90 Local agents within the area have indicated that they are not aware of any specific requirements for the town centre, but state that any requirements that may come forward, are likely to be from local, independent traders.

Planning Applications

3.91 There are currently no major retail planning applications relating to Littleport town centre.

Littleport Masterplan Opportunity Sites

3.92 The Littleport Masterplan adopted in May 2011 set out six development frameworks for the town. Development framework 5 'Reinforcing the town centre' seeks to establish a strengthened and improved retail offer in the town centre that will encourage people to shop and spend more money within the local economy. The masterplan proposes to maximise town centre shopping by concentrating retail uses at the western end of the town centre and providing additional retail space, through redevelopment of sites and restricting the conversion of empty commercial property to residential units.

Accessibility

3.93 Accessibility to the centre by public transport: there are two bus services which serve Littleport, with one of them offering daily services, and one offering a weekly service linking the town with Ely and Cambridge.

3.94 Accessibility to the centre by private transport: Main Street is one-way for traffic.There is some on-street car parking available on Main Street, although this is limited, and less restricted on-street car parking on the surrounding streets. There is also a free public car park available located off Main Street with a total of 99 long stay spaces available in Littleport.

Table 14: Littleport Town Centre Car Park Occupancy

	Wednesday		Saturday	
Car Park	AM	PM	AM	PM
Main Street, Long stay	80.33%	34.43%	93.44%	47.54%
Hempfield Road, Long stay	48.57%	14.29%	45.71%	20%

Source: ECDC Survey Wednesday 25th January 2012 & Saturday 28th January 2012 in calm weather conditions. AM= 10:30am PM= 2:30pm

3.95 Accessibility within the centre: there are public crossing points on Main Street, and traffic calming measures are in place outside the Crown Pub.

Environmental Quality

3.96 Main Street in Littleport is the centre of the town, and like Soham there is a mix of traditional and modern shop units. The traffic calming measures on Main Street and the good repair of the retail units contribute to a pleasant shopping environment. There is public seating and litter bins provided on Main Street.

Customer Views and Behaviour

3.97 The Visitors' Survey undertaken in Littleport in March 2005 provides information on the views and behaviour of visitors to the town and we summarise the key findings below:

- the main purpose of respondents visits to Littleport is food shopping;
- Visitors to the centre generally travel less than 20 minutes to get to the centre; this is reflected by the fact that more than 50% of visitors travelled on foot or by bicycle;
- Visits to Littleport are more frequent than visits to Ely and the length of the visit is shorter.

Local Centres Assessment

3.98 We set out below the assessment for each of the eight local centres that we have examined. We have assessed the mix of uses, vacancies, environmental quality and accessibility. As the results of the assessments show, the retail offer in each of the local centres range in size from just two retail units in Stretham to twenty retail units in Burwell.

Bottisham

3.99 Bottisham is located to the south of the district, south of both Ely and Soham. The village is located just off the A1303, which links Newmarket and Cambridge. The village green provides the centre of the settlement, with the retail units located on the High Street facing the green. The village is relatively large and there are a number of community facilities, including a secondary school and public library.

Mix of Uses and Vacancies

Table 15: Retail Uses in Bottisham 2011

Use class	Category	Shop name
A1 convenience	Newsagents General Store (with Post Office) Pharmacy Haberdashery	 Elston Interiors
A1 comparison	Hairdressers	Morgan's Hairdressers
A3	Restaurant	Bottisham Brasserie
A4	Public House	The Bell Inn
A5	Hot food takeaway Hot food takeaway Hot food takeaway	Jasmine Fish & Chips Elite Burgers Classic Spice Indian
Other	Garage Garage	Rank Brothers Bottisham Garage
Vacant	-	-

Source: East Cambridgeshire District Council Retail Survey 2011

3.100 The number of retail units is small and serves the local catchment area for top up shopping needs. The majority of the retail units are independents. There are no vacant units in Bottisham.

3.101 These findings compare with the 2005 East Cambridgeshire Retail Study undertaken by Roger Tym & Partners which found that Bottisham had the following facilities – see table 16.

Table 16: Retail Uses in Bottisham 2005

Use class	Category
A1 convenience	2 food shops
A1 comparison	1 Post office (as part of convenience use) 1 non-food shop
A3	1 café / restaurant
A4	1 Public House
A5	1 takeaway
Vacant	-

Source: East Cambridgeshire District Council Retail Survey 2011

3.102 Since 2005, there has been an increase in the number of retail uses in Bottisham: the increase in the number of 'hot food takeaway' (A5) is particularly noticeable.

Environmental Quality

3.103 Bottisham benefits from an attractive village environment which is enhanced by its historic, rural setting.

Accessibility

3.104 Public transport – Bottisham has three frequent bus services providing links to Cambridge, Newmarket, Bury St Edmunds and Ely. The bus stops are located along the main route through the village.

3.105 Private transport – Bottisham village is highly accessible by private car being located just off the A1303 which links Newmarket and Cambridge. The main routes through the village are uncongested. Two parking lay-bys are located at the village green providing up to eight on-street parking spaces.

3.106 Pedestrians – The village does not have any specific pedestrian priority areas, but given the low flow of traffic within the village, pedestrian access and crossing roads is straightforward. Further, all the main streets within the village have footpaths alongside the highways, increasing pedestrian safety.

Burwell

3.107 Burwell, like Bottisham, is also located to the south of the district, on the B1102 off the A142. There is a main linear route which runs through the village, on which the majority of the retail units are located. Burwell is a large village and it therefore has a good range of community facilities, a doctors surgery, petrol station and sports centre.

Mix of Uses and Vacancies

Table 17: Retail Uses in Burwell 2011

Use class	Category	Shop name
A1 convenience	Bakers	Lane's Bakery

	Butchers General Store (with Post Office) General Store (with petrol station) Foodstore	Jack Hurrell Butchers Manchetts/Budgens Co-op
A1 comparison	Gift shop/haberdashery Gift shop Hairdressers Hairdressers Hairdressers Florists Florists Beauty Salon Optician Haberdashery Pharmacy	Tinas Finishing Touch Sandras Katherine Paul Boppos Angela's Flowers Pick of the Bunch Image Hair and Beauty All Eyes Idina Lloyds Pharmacy
A2	Bank Building Society Estate Agents	Barclays Cambridge Building Society Morris Armitage
A3	Restaurant Restaurant	Spice Cottage The Fox
A4	Public House Public House Public House	The Crown Five Bells The Anchor
A5	Fish & Chip Shop Hot food Takeaway Hot food Takeaway	The Best Plaice Foon Lok Happy House Chinese
Vacant	-	-

Source: East Cambridgeshire District Council Retail Survey 2011

3.108 As the table above shows, there is an extensive range of retail outlets in Burwell: it has the largest number of retail units of all the local centres, and the widest range of A1 convenience retailing to be found in all the local centres. Both national multiples such as Lloyds pharmacy and the Co-op, and a range of independent retailers are present. There is also a weekly market stall on the ex-servicemans club car park. There are no vacant units in Burwell.

3.109 These findings compare with the 2005 East Cambridgeshire Retail Study undertaken by Roger Tym & Partners which found that Burwell had the following facilities – see table 18.

Table 18: Retail Uses in Burwell 2005

Use class	Category
A1 convenience	7 food shops
A1 comparison	1 Post office 5 non-food shops
A2	2 bank / building societies
A3	2 cafés / restaurants
A4	3 Public Houses
A5	2 Takeaways
Vacant	-

Source: East Cambridgeshire District Council Retail Survey 2011

3.110 Since 2005 there has been a increase in the number of retail uses in Burwell. The increase in the number of 'non food shops' (A1 comparison) is particularly noticeable from 5 units to 10 units; there is also an increase in the number of hot food take-aways. A2 uses, which are generally not found in the other local centres, have been retained since 2005.

Environmental Quality

3.111 Burwell comprises two distinct areas, North Street and High Street, which have joined through successive development. These two areas form conservation areas and contain many listed buildings. The village as a whole is characterised by its historic context, elements of which date back to Roman occupation. This all combines to provide an attractive village environment.

3.112 However, as a result of the two areas mentioned above, the retail and community facilities are spread the length of the village, up to 1km apart.

Accessibility

3.113 Public transport – Burwell is served by two bus routes providing frequent links to Cambridge and Newmarket. The bus stops are located along the main routes within the village within close proximity to the retail outlets.

3.114 Private transport – there is on-street car parking available in Burwell as well as at the Sports & Social club.

3.115 Pedestrians – Pedestrian access around the village is relatively straightforward with footpaths provided along the main routes through the village. Pedestrian crossing facilities are provided at the village green, and other crossing points are demarcated with raised paving providing a warning to drivers.

Fordham

3.116 Fordham is located approximately 3km to the south of Soham on the A142, the main route between Ely and Newmarket. The settlement is irregular in shape and development is spaced out along the main routes through the village. Whilst part of the village is located on the A142, the centre of the village containing the retail outlets is located off this route, on the B1102. There are a number of community facilities in the local centre including a primary school, community centre and recreation ground.

Mix of Uses and Vacancies

Table 19 Retail Uses in Fordham 2011

Use class	Category	Shop name
A1 convenience	Foodstore Convenience store/garage Convenience store/garage Butchers	Co-op Londis/Fordham Service Station Pace Carter Street Butchers
A1 comparison	Hairdressers	Michaela's

	Hairdressers Beauty Salon Electronic equipment	Headturners Lillys Beauty Jenkins Electronics
A3	Restaurant Restaurant / Takeaway Restaurant / PH	The White Pheasant Links Chinese The Chequers
A4	Public House	The Crown Inn
Other	Garage Garage	Lloyds Garage/MOT Shaun Wiseman
Vacant	-	-

Source: East Cambridgeshire District Council Retail Survey 2011

3.117 As the table above shows there is a good range of retailing in Fordham. The retailers are largely independent apart from the Co-op foodstore and the Londis, both of which provide for top up shopping needs. There are no vacant units in Fordham.

3.118 These findings compare with the 2005 East Cambridgeshire Retail Study undertaken by Roger Tym & Partners which found that Fordham had the following facilities – see table 20.

Table 20 Retail Uses in Fordham 2005

Use class	Category
A1 convenience	3 food shops
A1 comparison	3 non-food shops
A2	No bank / building societies
A3	3 cafés / restaurants
A4	1 Public Houses
A5	-
Other	1 petrol / car service
Vacant	-

Source: East Cambridgeshire District Council Retail Survey 2011

3.119 Since 2005 there has been an increase in both the number of A1 convenience and comparison units. There has been no change in the number of food and drink establishments. There is no longer a Post Office in Fordham.

Environmental Quality

3.120 The village is quite spread out and as such the character of the village varies. The historic core of Fordham, which contains the majority of the retail and community facilities, provides an attractive village environment.

Accessibility

3.121 Public transport – Fordham is served by three bus services, although one of these services only runs two days per week. These services provide the town with frequent links to Cambridge, Newmarket and Ely. The main bus stop is located centrally within the village near most retail facilities.

3.122 Private transport – The village is easily accessed by private car given that the village is located off the A142 main route from Ely to Newmarket. Parking within the village is on-street.

3.123 Pedestrians – Movement throughout most of the village is relatively straightforward with the provision of footpaths. Light traffic on most roads enables pedestrians to cross without the specific need for a formal crossing point.

Haddenham

3.124 Haddenham lies to the south and west of Ely, on the A1123, off the A10. There are a number of community facilities in the local centre such as a library and village hall, as well as the retail shops.

Mix of Uses and Vacancies

Table 21 Retail Uses in Haddenham 2011

Use class	Category	Shop name
A1 convenience	Grocery Store/Pharmacy Grocery Store Butcher	Mace Spar Harnwell & Sons
A1 comparison	Post office Bookshop Hairdresser Hairdresser Hairdresser Gift shop/Tea Shop Beauty Salon Craft Shop	 Hereward Books Sarah Tindall Lucy Tindall TLC hair salon Galleries Body Language Beauty Salon Spoilt Rotten Beads
A2	-	-
A3	-	-
A4	Pub Pub	The Three Kings The Cherrytree
A5	Takeaway	Chows Chinese Takeaway
Vacant	-	-

Source: East Cambridgeshire District Council Retail Survey 2011

3.125 As the table above shows there is a relatively small range of retail uses in Haddenham, although the local centre supports two small grocery stores and an independent butcher. The majority of the retailers in Haddenham are independent, with the exception of the national multiples, Spar and One Mace. The retail units here generally cater for day to day shopping needs although there are some specialty shops such as the bookshop. There are no vacant units in Haddenham.

3.126 These findings compare with the 2005 East Cambridgeshire Retail Study undertaken by Roger Tym & Partners which found that Haddenham had the following facilities – see table 22.

Table 22 Retail Uses in Haddenham 2005

Use class	Category
A1 convenience	3 food shops
A1 comparison	1 post office 3 non-food shops
A2	No bank / building societies

A3	No café / restaurants
A4	2 Public Houses
A5	1 takeaway
Vacant	-

Source: East Cambridgeshire District Council Retail Survey 2011

3.127 Since 2005 there has been an increase in the number of retail uses in Haddenham. The increase is found in the number of 'non-food shops' (A1 comparison), with the addition of a new hairdresser.

Environmental Quality

3.128 The shops are located on High Street, clustered around the junction with The Green. The shops are clustered fairly close together, although they are interspersed with residential uses. There are historic and traditional buildings in Haddenham which add to the attractive environment.

Accessibility

3.129 Public transport - Haddenham is accessible by public transport with two bus routes, which link the local centre with Cambridge and Ely.

3.130 Private transport - This local centre is easily accessed by private transport – it is located on the A1123. There is on-street car parking on High Street, although it is limited, and there is parking provided for customers of The Three Kings pub. The junction of High Street with The Green tends to be busy, and parked cars at this junction add to the congestion.

3.131 Pedestrians - The main junction in the village, where High Street meets The Green is busy and therefore not easy for pedestrians to cross.

Isleham

3.132 Isleham is located to the south east of Soham, approximately 12km south east of Ely. The village is located in a rural location on the B1104. The retail units are located on the main road through the village. The village is relatively small and compact, but there are a number of community facilities, including a primary school and a multi use games area.

Mix of Uses and Vacancies

Table 23 Retail Uses in Isleham 2011

Use class	Category	Shop name
A1 convenience	General Store (with Post Office) Foodstore	W Patterson Co-op
A1 comparison	Beauty Salon	J Mercede
A3	Restaurant	The Merry Monk
A4	Public House Public House	The Griffin The Rising Sun
A5	Hot food takeaway	Bamboo Garden
Other	Petrol Station / Garage	Renault Priory Garage
Vacant	-	-

Source: East Cambridgeshire District Council Retail Survey 2011

3.133 As the table above shows there is a relatively limited range of retail uses in Isleham which serve the local community for daily top-up shopping. The majority of the retailers are independents, with the exception of the Co-op foodstore. There are no vacant units in Isleham.

3.134 These findings compare with the 2005 East Cambridgeshire Retail Study undertaken by Roger Tym & Partners which found that Isleham had the following facilities – see table 24.

Table 24 Retail Uses in Isleham 2005

Use class	Category
A1 convenience	3 food shops
A1 comparison	No non-food shops
A2	No bank / building societies
A3	1 cafés / restaurants
A4	2 Public Houses
A5	1 takeaway
Other	1 petrol station
Vacant	-

Source: East Cambridgeshire District Council Retail Survey 2011

3.135 Since 2005 there has been no overall change in the number of retail units in Isleham. The only change seen has been a switch in one unit from A1 convenience to A1 comparison.

Environmental Quality

3.136 The village centre is characterised by historic buildings and traditional shop frontages and as such is an attractive village environment

Accessibility

3.137 Public transport – Isleham has a limited bus service providing links to Newmarket with one route stopping just once each day (Mon-Fri) and one of these services running only two days per week. The bus stops are located along the main route through the village.

3.138 Private transport – Whilst Isleham village is accessible only by B class roads, these routes are nevertheless highly accessible by private car and the village is clearly signposted. The main routes through the village are uncongested. Parking is primarily on-street, although approximately four off-street spaces are provided for customers of the Co-op store.

3.139 Pedestrians – Pedestrian access and crossing roads is straightforward within the village given the low level of traffic. Further, all the main streets within the village have footpaths alongside the highways, increasing pedestrian safety.

Little Downham

3.140 Little Downham is located to the north of Ely, and to the south of Littleport, on the B1411 off the A10. There are a number of community facilities in the local centre, as well as the retail shops, and unusually for a settlement of this size there is a car dealership. As the table below shows there is a small, limited range of retail uses in Little Downham which provide for top-up daily shopping needs.

Environmental Quality

3.141 It is a linear settlement, with the retail units located on Main Street. The shops are not grouped together; instead they are strung out along Main Street interspersed with residential uses, which does not create a cohesive retail core. The buildings along Main Street are typical of the local vernacular.

Mix of Uses and Vacancies

Table 25 Retail Uses in Little Downham 2011

Use class	Category	Shop name
A1 convenience	Grocery Store	Village Convenience Store
A1 comparison	Hair dresser Butchers Post office	Upper Cutz Harringtons Butchers Mobile service now within community rooms
A2	-	-
A3	-	-
A4	Pub	The Anchor Pub
A5	Takeaway	The Eastern Flyer
Vacant	59 Main Street	Advertised with Cheffins

Source: East Cambridgeshire District Council Retail Survey 2011

3.142 The table above shows that Little Downham has a small range of retail units, which serve local top-up shopping needs. The majority of the retailers are independents. There is currently one vacant unit in Little Downham.

3.143 These findings compare with the 2005 East Cambridgeshire Retail Study undertaken by Roger Tym & Partners which found that Little Downham had the following facilities – see table 26.

Table 26 Retail Uses in Little Downham 2005

Use class	Category
A1 convenience	1 food shops
A1 comparison	1 Post office 3 non-food shops
A2	No bank / building societies
A3	No bank café / restaurant
A4	1 Public House
A5	1 takeaway
Vacant	-

Source: East Cambridgeshire District Council Retail Survey 2011

3.144 Since 2005 there has been a decrease in the number of ‘non-food shops’ (A1 comparison).

Accessibility

3.145 Public transport: Little Downham is accessible by public transport – there are three bus routes which serve the local centre although two of these run on Thursdays only, connecting Little Downham with Ely.

3.146 Private transport: There is also on-street car parking in Main Street for users of the shops, but due to the parking on both sides of the street it can become congested which makes it difficult for cars to pass. However the volume of traffic is not at a level where this would cause a significant problem.

3.147 Pedestrians: At busy periods congestion on Main Street can cause some difficulties for pedestrians to negotiate. However this is not a significant issue.

Stretham

3.148 Stretham is a relatively small and compact village located to the west of Soham and approximately 6.5km south of Ely. The village is located at the junction of the A1123 (linking Soham with St Ives and Huntingdon) and the A10 (linking Kings Lynn with Ely and Cambridge). The village 'square' provides the centre of the settlement, with the retail units located on High Street/Chapel Street facing the square.

3.149 The village provides relatively few facilities, although there is a primary school and community centre. However, one of the key attractions for the village is the Old Stretham Beam Engine which dates back to 1830 and provided drainage for the fenland surrounding the area.

Mix of Uses and Vacancies

Table 27 Retail Uses in Stretham 2011

Use class	Category	Shop name
A1 convenience	General Store (with Post Office)	
A1 comparison	-	-
A4	Public House	The Red Lion
A5	Takeaway	Will Wok
Vacant	-	-

Source: East Cambridgeshire District Council Retail Survey 2011

3.150 The table above shows that Stretham has a very limited retail offer. There are no vacant units in Stretham

3.151 These findings compare with the 2005 East Cambridgeshire Retail Study undertaken by Roger Tym & Partners which found that Stretham had the following facilities – see table 28.

Table 28 Retail Uses in Stretham 2005

Use class	Category
A1 convenience	1 food shop 1 general store/post office
A1 comparison	No non food shops
A2	No bank / building societies
A3	No café / restaurant
A4	1 Public Houses
A5	1 Takeaway
Vacant	-

Source: East Cambridgeshire District Council Retail Survey 2011

3.152 Since 2005 there has been a slight decrease in the number of retail units in Stretham from 4 retail units to 3 units in 2011 with the loss of a fruit and vegetable shop.

Environmental Quality

3.153 The centre of Stretham provides an attractive village environment, surrounded by the historic church and listed buildings. The parts of the village which adjoin the A10 and A1123 are less so as the traffic detracts from the area.

Accessibility

3.154 Public transport – Stretham has one bus service providing links to Cambridge and Ely. This service runs every hour between Monday and Saturday. The bus stop is located centrally within the village outside the church on the High Street.

3.155 Private transport – Stretham village is accessible by private car being located at the junction of the A1123 and A10. The main route through the village (High Street) is uncongested. Parking is on-street although the village square is paved and provides for additional parking.

3.156 Pedestrians – Traffic flow within the village is minimal and therefore pedestrian access and crossing roads is straightforward. All the main streets within the village have footpaths alongside the highways, increasing pedestrian safety.

Sutton

3.157 Sutton is located to the south and west of Ely, just north of Haddenham, off the A142. There are a number of community facilities in the local centre including a community centre and a primary school.

Mix of Uses and Vacancies

Table 29 Retail Uses in Sutton 2011

Use class	Category	Shop name
A1 convenience	Grocery Store	One Stop
A1 comparison	Post office Hairdresser Pharmacy	 Vickys Sutton Pharmacy
A2	-	-
A3	Restaurant café	Sutton Tandoori Dottys Gift and Tea Shop
A4	Pub	Chequers
A5	Takeaway	Sun Rise
Vacant		1

Source: East Cambridgeshire District Council Retail Survey 2011

3.158 The table above shows that there are a limited number of retail units in Sutton which serve top-up shopping needs for the local catchment area. The majority of the retailers are independent. There is also The Anchor pub which lies beyond the main retail area of Sutton.

3.159 These findings compare with the 2005 East Cambridgeshire Retail Study undertaken by Roger Tym & Partners which found that Sutton had the following facilities – see table 30.

Table 30 Retail Uses in Sutton 2005

Use class	Category
A1 convenience	2 food shops
A1 comparison	1 Post office 1 non-food shops
A2	No bank / building societies
A3	1 café / restaurant
A4	1 Public Houses
A5	1 take away
Vacant	2

Source: East Cambridgeshire District Council Retail Survey 2011

3.160 Since 2005 there has been no change in the number of retail units in Sutton. However two vacant units in 2005 have come back into retail use with new A1 comparison and A3 café tenants. The butchers shop has also recently closed leading to a vacant unit on the High Street.

Environmental Quality

3.161 The shops are located on the High Street. The shops are not grouped together, with residential units interspersed. The buildings are of the local vernacular and there is an historic church located at one end of the High Street.

Accessibility

3.162 Public transport: There are three bus routes which serve Sutton, linking the local centre with Cambridge, Ely, March and Chatteris.

3.163 Private transport - There is on street car parking available in Sutton, as well as limited car parking outside the Post office and grocery store.

Conclusions

3.164 Ely is an attractive city centre with a high quality environment and considerable historic character. The city centre performs its role as the district centre for shoppers, leisure and tourism visitors. The city centre markets and events add to the diversity of Ely's offer. Our assessment suggests that although the centre performs well in a number of headline indicators there is also evidence of underperformance with prime rents falling and significant churn within the city centre that should be closely monitored to ensure the centres continuing health.

3.165 Soham and Littleport are performing less well as market towns. The range of retail facilities is limited in both market towns, the number of multiple retailers is even more limited and neither centre has a major 'key attractor'. Retail rents in Soham and Littleport are lower than in Ely and there is evidence to suggest that rental values have stagnated and fallen in recent years. Furthermore there is no evidence that national multiple retailers are seeking representation in either Soham or Littleport. Although vacancy rates have improved there is evidence over time that retail units have converted to residential use.

3.166 The survey of the eight local centres has shown a limited supply of retail space and realistically this provision can only serve top up shopping needs. The retail offer across the local centres has been relatively stable with little change in total numbers of provision of retail space.

4 QUANTITATIVE ASSESSMENT: Future Additional Capacity

4.1 In this section, we look at the current levels of performance of the East Cambridgeshire retail provision and project forward to forecast the anticipated need for any additional retail floorspace in the period 2011-2031.

4.2 As this Study represents a partial review, we have adopted the methodology of the previous East Cambridgeshire Retail Study to allow direct comparison to be drawn with earlier figures. That study followed a standard and widely accepted step-by-step methodology, based upon the evidence base from the household survey of shopping patterns and the town centre shoppers survey. Alongside our own evidence base we have obtained the latest Experian expenditure estimates and have used Experian Retail Planner Briefing Note 9 from September 2011.

Methodology

4.3 The following methodology was used by Roger Tym and Partners and has been adopted in this Partial Review.

Step 1: Define the study area and subdivide into the six zones that reflect as far as possible the existing distribution of retail area.
Step 2: Calculate population estimates for the total study area and each of the study area zones for the base year (2011) and the forecast years to up to 2031.
Step 3: Obtain per capita convenience and comparison goods expenditure estimates for each of the study area zones and the study area as a whole for the base and forecast years. All monetary values are at constant 2010 prices. For comparison and convenience expenditure, the proportion of expenditure going on special forms of trading such as the Internet is deducted.
Step 4: Calculate the total available comparison goods expenditure and convenience goods expenditure in the study area by applying the population data to the expenditure data, and calculate the growth in the expenditure over the period 2011-2031.
Step 5: Adjust available expenditure by residents to allow for expenditure flows into and out of the study area.
Step 6: Calculate the turnover of comparison floorspace at 2011 and potential growth over the period 2011-2031. Deduct increased efficiency gains from existing retail floorspace from the additional available expenditure. Calculate the turnover of the main convenience supermarkets within Ely in 2011, alongside any current convenience stores planning permissions, to assess any under or over trading.
Step 7: Convert the resulting net expenditure increases into floorspace using estimated sales densities.

Data Inputs

Household and Shoppers Survey

4.4 The household and shopper surveys provide a detailed factual evidence base on shopping patterns within the study area. The East Cambridgeshire Household and Shopping Surveys were undertaken in 2005 by Roger Tym & Partners on behalf of East Cambridgeshire District Council. The survey results identify shopping habits for households for both convenience and comparison goods.

4.5 The household survey has not been updated for this review as it was considered that the retail base of the District had not significantly changed in the intervening period of time, although it is accepted that additional retail floorspace has been provided outside the district. The new Sainsbury's store in Ely was officially opened in February 2012, a new Co-op in Littleport has only been operating for a short period of time, whilst the approved Aldi store for Ely is expected to be opened in 2013. It was felt therefore, that it would be more appropriate to re-run the surveys at a future date once these stores have become established and spending patterns within the district have settled.

4.6 The household survey provided information on residents' shopping patterns for both convenience and comparison goods. The survey confirmed that significant amounts of available expenditure were being lost to the district's town and local centres. The district currently retains only 63% of the market share for convenience shopping and 28% for comparison retailing. Ely is the prime convenience and comparison retailing centre with a market share of some 56% for convenience and 24% for comparison retention.

4.7 As we have not undertaken a household survey for this review for the reasons outlined above, we calculate the turnover of comparison floorspace in the district as a whole by assuming the market share has remained constant at 28%. We have adjusted this slightly to reflect the expenditure that comes into the District from outside the catchment area. In practical terms, almost all new projected new comparison floorspace is likely to be located in Ely.

4.8 The 2005 Retail Study Shoppers Survey showed that 10% of visitors were from outside the district, providing an inflow of expenditure, partly due to the number of tourism visitors to Ely. However, visitor inflow does not necessarily translate into an equal amount of expenditure and therefore we have adopted the assumption contained in the 2009 Roger Tyms & Partners Update to the East Cambridgeshire Retail Assessment and estimated inflow expenditure into Ely of 5%[3].

Study area and Population

4.9 The 2005 ECRS covered the whole of the district and identified six clear study zones. The household survey information related to each of the zones. These remain relevant to the East Cambridgeshire Local Plan and this partial review is therefore based on the same study zones.

[3] In comparison Cambridge City Centre retail assessment estimates an inflow of 11% from beyond their survey area.

4.10 In order to gain a precise projection of future additional convenience and comparison floorspace needs we have obtained population estimates for the study area from Cambridgeshire County Council for the base year 2011, and the study years 2016, 2021, 2026 and 2031[4].

4.11 The Cambridgeshire County Council population projections are based on the new housing trajectory for East Cambridgeshire submitted and approved by East Cambridgeshire District Council Development & Transport Committee in January 2012.

4.12 We calculate zonal populations by assuming that the proportion of the population in each zone is the same as that found in the 2005 and the 2009 retail study undertaken by Roger Tym & Partners on behalf of ECDC[5].

4.13 The population figures are set out in Appendix 8 & 9, and show that the population in the study area is expected to increase from 81,400 in 2011 to 94,100 in 2031. Overall the population within the district is projected to increase by 15.6% between 2011-2031.

Expenditure Estimates

4.14 Per capita expenditure estimates for comparison and convenience goods have been obtained from Experian for each of the zones and are all in 2010 prices. These have been adjusted to exclude expenditure on special forms of trading as set out below.

4.15 The per capita expenditure figures have been projected forward using the comparison and convenience growth rates contained in Figure 1a of Experian's Retail Planner Briefing Note 9 (September 2011). These show an initial contraction in convenience goods expenditure between 2011 and 2012 followed by a modest growth of 0.5% per annum to 2018 and then 0.6% per annum to 2028. We consider that this projection provides a more accurate estimate of future convenience growth, particularly for the next two years (2011-2013) when the economic picture within the UK is likely to remain uncertain.

4.16 Figure 1a of the Experian Retail Planner Briefing Note 9 has also been used for comparison expenditure growth for the same reasons. The Figure shows modest growth of comparison goods expenditure to 2014, followed by a 3% increase per annum up to 2028.

4.17 Appendix 9 shows that the total available convenience goods expenditure within the study zone is currently £158.48m. This is forecast to grow to £162.99m in 2016, £179.73m by 2021, £184.34m by 2026 and £195.91m by 2031. This represents an increase of £37.43m (23.6%) between 2011-2031.

4.18 Appendix 8 shows that the total available comparison goods expenditure within the study zone is currently £250.54m. This is forecast to grow to £276.10m in 2016, £343.55m by 2021, £396.87m by 2026 and £472.48m by 2031. This represents an increase of £221.94m (88.5%) between 2011-2031.

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[4] Mid year population projections from Cambridgeshire County Council Research Group based upon the updated ECDC housing trajectory 2011-2031 (ECDC 2011)
[5] The zonal population split is: 12.36% in Zone 1, 13.24% in Zone 2, 21.61% in Zone 3, 8.49% in Zone 4, 22.52% in Zone 5, 21.78% in Zone 6.

Internet Sales/ Special Forms of Trading

4.19 As part of the methodology for the additional floorspace forecasting we have deducted special forms of trading from the expenditure per capita figures for convenience and comparison goods. (Special forms of trading comprise sales via the internet, mail order, stalls and markets, door-to-door and telephone sales. On-line sales from supermarkets, department stores and catalogue companies are all included)

4.20 The household survey undertaken for the 2005 Retail Study found that the market share for special forms of trading was 4.6% of per capita expenditure. However the Experian Retail Planner Briefing Note 9 predicts a much higher increase in special forms of trading with comparison and convenience non-store retailing market share (adjusted for SFT sales from stores) expected to reach 12% and 7% respectively by 2031.

4.21 We are aware that internet expenditure is likely to grow over the study period and expect to see further investment in digital infrastructure within East Cambridgeshire.[6] It is our view that this investment in digital infrastructure alongside improvements already enabled by BT Openreach since 2005 will enable households within the study area to reach the predicted levels of Experian special forms of trading market shares. As such we have applied the Experian levels of special forms of trading from its Retail Planner Briefing Note 9 (Appendix 3).

Floorspace Data

4.22 In planning for future provision of convenience and comparison it is important to recognise that the specific types of retailing that come forward in the future will influence the sales density which is eventually achieved. In converting the projected growth in comparison goods spending, we have adopted the average sales densities used in the 2009 East Cambridgeshire Retail Study for a range of goods in Ely of some £4,000 per sq m net up to 2016 and then increased for future years (2016-2031) to £4,500 per sq m.

4.23 For converting the predicted growth in convenience goods spending we assume two alternative sales densities- a higher density of £10,000 per sq m in 2011, applicable to a large operator such as Tesco or Sainsbury's and a low density of £5,000 per sq m, applicable to lower level operators such as Iceland or Co-operative.

4.24 In practice, future sales densities in Ely will reflect a combination of consumer demands in the catchment area, market trends, and the precise combination of retail formats, which will be brought forward. Our projections of broad floorspace requirements simply establish a generalised floorspace requirement, which will then need to be monitored against changing trends.

[6] Cambridgeshire County Council has committed to deliver Next Generation Access for superfast broadband (25mbps downstream) to 100% of businesses and 90% of residents and an improvement in broadband speeds to the final 10% of households across the county by 2015

4.25 Not all the increase in comparison and convenience goods expenditure will be available to support new floorspace. Some will be absorbed by increases in the sales density of existing outlets. The Experian Retail Planner Briefing Note 9 sets out the following recommendations and these have been incorporated into our calculations for additional convenience and comparison floorspace.

Table 31: Convenience and Comparison Density Growth Rate

	2011	2012	2013	2014-18	2019-28
Convenience Density Growth Rate (%)	-1.0	0.2	1.0	1.1	1.2
Comparison Density Growth Rate (%)	0.7	2.2	2.6	3.6	3.5

Source: Experian Retail Planner Briefing Note 9 (September 2011) Figure 3a & 3b

Convenience Goods Assessment

4.26 The household survey included questions on main and food shopping and the results allow us to form a pattern of convenience spending, expressed as a market share for each destination or foodstore, for each survey zone.

4.27 Using the composite market shares derived from the household survey and 2011 baseline expenditure estimates, we have calculated the convenience goods turnover of the main convenience provision within the study area. For East Cambridgeshire these are Tesco and Waitrose in Ely with a 44% and 13% market share respectively. (See Appendix 9)

4.28 This analysis of the main convenience provision within the study area allows us to review the performance of the main food stores by comparing each store with expected company average sales densities. The table below sets out the results.

Table 32: Performance of Ely Supermarkets

	Tesco	Waitrose
Net Floorspace (Sqm)	3048	1059
Projected turnover of store per annum (£m)	55.5	17.8
Turnover per sqm net (£)	18209	16791
Company average per sqm net (£)	13400	12473
Projected overtrading (£m)	14.66	4.57

Source: East Cambridgeshire District Council Retail Study 2012: Updated Partial Review

4.29 Our analysis of the Tesco and Waitrose stores in our base year shows overtrading of £14.66m and £4.57m respectively when compared to the company averages. This highlights their position as the main convenience retail provision within the study area.

4.30 However, in February 2012 Sainsbury's opened a new foodstore in Ely. The Sainsbury's Planning and Retail Statement (June 2009) estimates that with a net sales area of 4,314 sq m, the store is expected to achieve a turnover of £42.7m. Sainsbury's estimate a 75:25 convenience/comparison split resulting in a convenience/comparison goods turnover of £32m and £10.7m respectively. The assessment indicates that the majority of the convenience goods turnover will be drawn from existing Ely supermarkets and will take up the major part of the overtrading element of the Tesco and Waitrose stores.

4.31 In addition to Sainsbury, planning permission exists for an Aldi store on Lisle Lane. This planning permission has not yet been implemented. Aldi are a discount retailer and will therefore provide a different retail offer in the city, when compared to the other convenience stores. The expected turnover of Aldi would be significantly less than the larger stores at £3.9m. It is not anticipated that Aldi would compete directly with the larger stores but, nevertheless, it would draw an element of trade from those stores and would also account for some of the expected increase in expenditiure.

4.32 It is anticipated therefore that, with the addition of the Sainsbury and potentially the Aldi store, the overtrading turnover of Tesco and Waitrose would reduce and in future, the stores in Ely will likely generate turnovers in line with their national averages.

4.33 The 2005 household survey found that the study area has a retention level of 63% for convenience retailing. Based on these shopping patterns we estimate that the district retain some £99.8m of the £158.48m available convenience expenditure in the base year of 2011 (See Appendix 9)

4.34 The convenience expenditure of the study area is forecast to increase over the period to 2031 as the result of growth in population and expenditure. We project that total convenience expenditure for the study area could reach £162.99m by 2016, £179.73m by 2021, £184.34m by 2026 and £195.91m by 2031.

4.35 In calculating future capacity for convenience goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will increase over time, thereby absorbing some of the anticipated increase in convenience goods expenditure available. (See table 31 for annual rates of growth) As a consequence, we consider that there will be a relatively small residual capacity available for future convenience floorspace capacity by 2031.

4.36 On this basis, we project that an additional 1,984 sqm of convenience capacity will be required within the district by 2031.

4.37 The total additional convenience capacity for the district should be phased to meet the needs of the new population. Based on the growth of population numbers in five year periods we recommend the following:

Table 33: Total additional convenience capacity for East Cambridgeshire 2011-2031

5 Year Period	Additional Convenience Floorspace Capacity (Sqm)
2011-2016	284
2016-2021	909

2021-2026	180
2026-2031	612

Source: East Cambridgeshire District Council Retail Study 2012: Updated Partial Review

Comparison Goods Assessment

4.38 The 2005 household survey identified that the District retains a market share of only 28% for comparison retailing; Ely is the prime comparison retailing centre with a market share of some 24%.

4.39 The 2005 shoppers survey also highlighted that 10% of visitors to Ely were from outside the district. As visitor numbers do not directly translate into visitors' expenditure we have estimated a 5% expenditure inflow into Ely.

4.40 Based on these shopping patterns we estimate that Ely has a comparison goods turnover from the survey area of £59.88m in 2011(See Appendix 8). With the inflow of 5% from beyond the district this equates to total Ely city centre base year comparison expenditure of £62.87m.

4.41 The turnover of Ely city centre is forecast to increase over the period to 2031 as the result of growth in population and expenditure. We estimate that turnover could reach £69.29m by 2016. £86.21m by 2021, £99.59m by 2026 and £118.57m by 2031.

4.42 In calculating the future capacity for additional comparison goods floorspace, we have assumed that existing floorspace efficiencies will increase over time absorbing some of the increase in comparison goods expenditure available. (See table 31 for annual rates of growth) However, this will be a relatively small amount and it is envisaged that the growth in population and expenditure within the study area will create a large residual capacity by 2031.

4.43 We estimate that an additional 6,373 sqm of comparison capacity will be required within Ely by 2031. Additionally a further 1,097 sqm of comparison floorspace capacity will be needed in the rest of the district. As per the previous Roger Tym & Partners retail study for East Cambridgeshire we recommend that this is split 60/40% between Soham (60%) and Littleport (40%).

4.44 This would mean 658 sqm of additional comparison floorspace for Soham to 2031 and 439 sqm of additional comparison floorspace for Littleport to 2031 The total additional comparison capacity for the district's main service centre in Ely should be phased to meet the needs of the new population. Based on the growth of population numbers in five year periods we recommend the following:

Table 34: Total additional comparison floorspace capacity for Ely 2011-2031

5 Year Period	Additional Comparison Floorspace Capacity (Sqm)
2011-2016	406
2016-2021	2,407
2021-2026	1,289

2026-2031	2,270

Source: East Cambridgeshire District Council Retail Study 2012: Updated Partial Review

Conclusion

Convenience goods retail floorspace

4.45 The main convenience provision within the study area has shown a strong performance over recent years with above average levels of turnover compared to their respective national averages. However, it is anticipated that the new Sainsbury's on Lisle Lane in Ely will provide new competition to Tesco and Waitrose and will draw trade away from those stores reducing their turnovers in line with their company averages.

4.46 Taking the new Ely Sainsbury's store into account Table 33 shows that over the planning period 2011-2031 we project that an additional 1,984 sqm of convenience floorspace capacity will be required within the district by 2031.

4.47 We recommend that the future convenience floorspace requirement is reviewed in 18 months so that changes to the shopping patterns can be taken into account following the opening of the new Ely Sainsbury's. The market shares can be reviewed and adjusted following a shoppers' and/or household survey for the study area.

Comparison retail goods floorspace

4.48 Table 34 shows that over the long term forward planning period 2011-2031 there is the potential for 6,373 sq m of additional comparison floorspace within Ely.

4.49 We recommend that the additional district wide comparison floorspace capacity be split on a 60%/40% basis between Soham and Littleport. This would result in 658 sq m of additional comparison floorspace capacity for Soham and 439 sq m of additional comparison floorspace capacity for Littleport.

4.50 Given the current uncertainty brought about by the downturn we recommend that the situation is monitored and reviewed in 18 months. This will enable the floorspace capacity estimate to be adjusted to reflect national economic change, changes in market share, and progress in local regeneration initiatives if appropriate, and also coincide with the new shoppers' and /or household survey referred to above.

Phasing

4.51 The development of additional convenience and comparison floorspace will need to be carefully planned to fit in with the East Cambridgeshire Local Plan Housing Trajectory up to 2031 as set out in tables 33 and 34 respectively.

5 QUANTITATIVE ASSESSMENT: Scenario Testing

5.1 In the previous section we have set out the baseline forecasts for additional convenience and comparison floorspace for the planning period 2011-2031. This was based on evidence from our household and shoppers surveys and data collected from Experian in terms of expenditure growth and the latest estimates from the Experian Retail Planner Briefing Note 9 (September 2011).

5.2 We expect economic growth to remain muted in the next few quarters as households are constrained by subdued disposable income growth and a weak labour market; government finances remain under severe pressure; investment remains restricted and exports struggle. With the recent announced contraction of GDP over the past three months it is possible that the UK may slip back into recession with prospects for growth in consumer spending in 2012 remaining gloomy.

5.3 Set against the backdrop of economic forecasts we have decided to examine the implications for convenience and comparison goods against three scenarios looking at the recently generated new housing forecasts within East Cambridgeshire, increases in the comparison spend retention rates as well as the effects of differing average sales densities on the amount of floorspace required.

Population

5.4 East Cambridgeshire is currently undertaking a review of its Local Plan following the Government's stated intent to remove the top down regional housing targets. As part of the review a new housing trajectory to 2031 has been developed to take account of local needs and the visions set out within a series of Masterplans for Ely, Soham and Littleport. This new housing trajectory has formed the basis of the population estimates for our baseline future additional comparison and convenience floorspace.

5.5 Cambridgeshire County Council has modelled the updated housing trajectory in order to provide an updated population projection for East Cambridgeshire. As part of our sensitivity analysis we have also looked at a higher rate of population growth to enable us to test an 'optimistic' forecast for housing completion rates to 2031. The forecast population numbers for both the baseline and increased population numbers are outlined in the table below.

Table 35: East Cambridgeshire Population Projections 2011-2031

Year	2011	2016	2021	2026	2031
Housing Trajectory Population Projections (Approved Jan 2012)	81,400	84,300	90,900	91,000	94,100
Optimistic	81,300	85,000	88,000	91,600	101,800

Housing Trajectory Population Projections					

Source: Cambridgeshire County Council Research Group

5.6 In order to assess any potential changes in additional comparison and convenience floorspace needed as a result of the alternative housing trajectory outlined above we have calculated the forecast additional capacity using the new population numbers that would see population rise to 101,800 by 2031.

5.7 To ensure a fair comparison we have assumed that the household and shopping survey inputs and Experian expenditure, growth and special forms of trading data all remain constant. The below table sets out the differing additional comparison and convenience capacity requirements to 2031 for the two differing population projections.

Table 36: Future Additional Comparison & Convenience Floorspace Capacity Scenario Testing- Population

	2011-2016	2016-2021	2021-2026	2026-2031	Total
Future additional comparison capacity (Pop 101,800 by 2031)	664 sqm	1,930 sqm	2,497 sqm	4,971 sqm	10,064 sqm (Ely: 8,606 sqm. Soham: 875 sqm. L'Port: 583 sqm)
Future additional comparison capacity (Pop 94,100 by 2031)	472 sqm	2,798 sqm	1,560 sqm	2,638 sqm	7,468 sqm (Ely: 6,373 sqm. Soham: 658 sqm. L'Port: 439 sqm)
Future additional convenience capacity (Pop 101,800 by 2031)	382 sqm	463 sqm	619 sqm	1547 sqm	3,011 sqm (Ely: 1,505 sqm. Soham: 903 sqm. L'Port: 602 sqm.)
Future additional convenience capacity (Pop 94,100 by 2031)	284 sqm	909 sqm	180 sqm	612 sqm	1,984 sqm (Ely: 992 sqm. Soham: 595 sqm. L'Port: 397 sqm)

Source: East Cambridgeshire District Council Retail Study 2012: Updated Partial Review

5.8 The increase in population numbers we tested would see an increase in the need for future additional comparison and convenience capacity over the plan period to 2031.

5.9 Ely, the focus for the majority of additional comparison capacity, would need 8,606 sqm, as opposed to 6,373 sqm, an increase of 2,233 sqm of additional comparison capacity.

5.10 For future additional convenience capacity the increase in population would result in an increase need for floorspace up to 2031 with the total additional capacity required increasing from 1,984 sqm to 3,011 sqm. Within Ely, the focus for 50% of the total district additional convenience capacity, the future need would increase from 992 sqm to 1,505 sqm.

Retention Rate

5.11 The Ely Masterplan sets out future retail development opportunity sites within Ely city centre. The development of the city centre opportunity sites may allow the district the chance to improve its comparison expenditure retention rate from its current level of 23.9% for the city of Ely.

5.12 The opportunity sites offer the chance to provide additional shopping floorspace, leisure and cultural facilities and central high density residential accommodation that will bring additional footfall to the centre and offer retailers a better choice of shop floorplates.

5.13 In the medium to long term this brings the opportunity to potentially increase the retention rate within the district. As such we have looked at the changes to future additional comparison capacity to take account of a 30% and 45% retention rate for comparison spending within Ely based on the new housing trajectory numbers.

Table 37: Future Additional Comparison Floorspace Capacity Sensitivity Testing- Retention Rate

Ely Retention Rate	2011-2016	2016-2021	2021-2026	2026-2031	Total (Sqm)
23.9%	406	2,407	1,289	2,270	6,373
30%	510	3,021	1,618	2,385	7,534
45%	764	4,532	2,427	4,275	11,998

Source: East Cambridgeshire District Council Retail Study 2012: Updated Partial Review

5.14 An increase in the retention rate to 30% for Ely would see a need for an additional 1,161 sqm of comparison capacity from the baseline levels. An increase in the retention rate to 45% for Ely would see a need for an additional 5,625 sqm of comparison capacity from the baseline levels.

Sales Densities

5.15 In order to assess the differing space requirements for different types of supermarkets formats we have tested three alternative sales densities within the new housing trajectory numbers.

5.16 A high density (£12,500 per sqm based on the average sales densities across the big five supermarkets: Tesco, Sainsbury's, Morrisons, Asda and Waitrose). A medium density (£10,000 per sqm) to allow comparison with the previous Roger Tym & Partners Retail Study update in 2009 and a low sales density (£5,000 per sqm), applicable to operators such as Iceland or the Co-operative.

Table 38: Future Additional Convenience Floorspace Capacity Sensitivity Testing- Sales Densities

Sales Densities (£ per sqm)	2011-2016	2016-2021	2021-2026	2026-2031	Total (Sqm)
5000	568	1817	360	1224	3,969
10000	284	909	180	612	1,984
12500	227	727	144	489	1,588

Table 37: Future Additional Comparison Floorspace Capacity Sensitivity Testing- Retention Rate

5.17 The above table shows that the district will, up to 2031, require between 1,588-1,984 sqm of additional convenience capacity depending on the sales densities used.

5.19 In practice, future sales densities in Ely will reflect a combination of consumer demands in the catchment area, market trends and the precise combination of retail formats to be brought forward. Our projections of broad floorspace requirements simply establish a generalised floorspace requirement which will then need to be monitored against changing trends.

6 CONCLUSIONS AND RECOMMENDATIONS

Comparison Goods

6.1 The focus for comparison goods retailing should continue to be within Ely. Based on a continuation of established market shares we project a requirement for up to 6,373 sq m net of additional comparison goods floorspace based on a typical high-street type sales density of £4,000 in 2016, rising to £4,500 per sq m net up to 2031.

6.2 A 60/40 split for additional comparison floorspace outside of Ely would for Soham, mean a requirement for 658 sqm net of additional comparison goods floorspace to 2031 and for Littleport 439 sqm of additional comparison goods floorspace.

6.3 Given the current economic uncertainty we suggest that a cautious approach be given to the long term assessment of requirements and that more detailed impact assessments of edge of centre and out of town developments should be required to ensure the future vitality and viability of Ely. It will be important to restrict the spread of high street retailing to out of centre locations.

Convenience Goods

6.4 We project, on a continuation of established market shares, a requirement for up to 1,984 sq m net of additional convenience goods floorspace to 2031.

6.5 Based upon the location of the likely future housing growth a 50/30/20 split of the total additional space between Ely (50%), Soham (30%) and Littleport (20%) would equate to 995 sqm of additional convenience floorspace for Ely; 595 sqm of additional convenience floorspace for Soham; and 397 sqm of additional convenience floorspace for Littleport to 2031. Alternatively, consideration could be given to locating this floorspace in just one or two of the market towns.

6.6 With the opening of a new Sainsbury's store within Ely and recent planning approval for a new Aldi store we do not believe there is now a quantitative or qualitative case for the diversion of overtrading turnover within either the Tesco or Waitrose stores at Ely.

6.7 Following the Sainsbury's development and the approval for a new Aldi store on Lisle Lane, Ely we recommend that a further reassessment of the district household and shopping survey should be undertaken after an 18 month 'settling in' period to reflect the changes to the shopping patterns within the district.

Town Centres

6.8 Although below the national average for vacancy rates we believe that detailed healthcheck analysis has shown underlying vulnerability within Soham and Littleport town centres and a need for ongoing monitoring and careful management of future retail development for Ely. Robust retail impact assessments for any future edge of town/out to town developments will continue to be essential.

Town Centre Boundaries and Shopping Frontages

6.9 The 2005 Retail Study for East Cambridgeshire established a town centre boundary, and primary and secondary shopping frontages for Ely, Soham & Littleport.

Ely

6.10 The core shopping area (see Appendix 4) covers the length of the High Street, from Minster Place to Forehill. The primary shopping frontage also includes Market Place and Market Street between the junction with Market Place and the junction with Newnham Street. Waitrose supermarket and the other shops within the Cloisters are included within the primary shopping frontage.

Soham

6.11 The core shopping area (see Appendix 4) identified is the High Street, extending northwards along Churchgate Street to Pratt Street where the majority of the retail units are located

Littleport

6.12 The core shopping area (see Appendix 4) identified is around the retail units located on Main Street, running between the junction with High Street and just beyond the junction with Granby Street to include the library.

6.13 We believe that the town centre boundary, and primary shopping frontage within Ely should remain unchanged. However we consider that the local plan review should carefully consider the changing role of Forehill as a secondary shopping frontage in light of the Sainsbury's development on Lisle Lane.

6.14 We believe that the town centre boundary, and primary and secondary shopping frontage within Soham should remain unchanged.

6.15 We recommend that the local plan review process study proposals within the Littleport Masterplan to amend the town centre boundary to maximise town centre shopping by concentrating retail uses at the western end of the town centre and providing additional retail space, through redevelopment of sites and restricting the conversion of empty commercial property to residential units.

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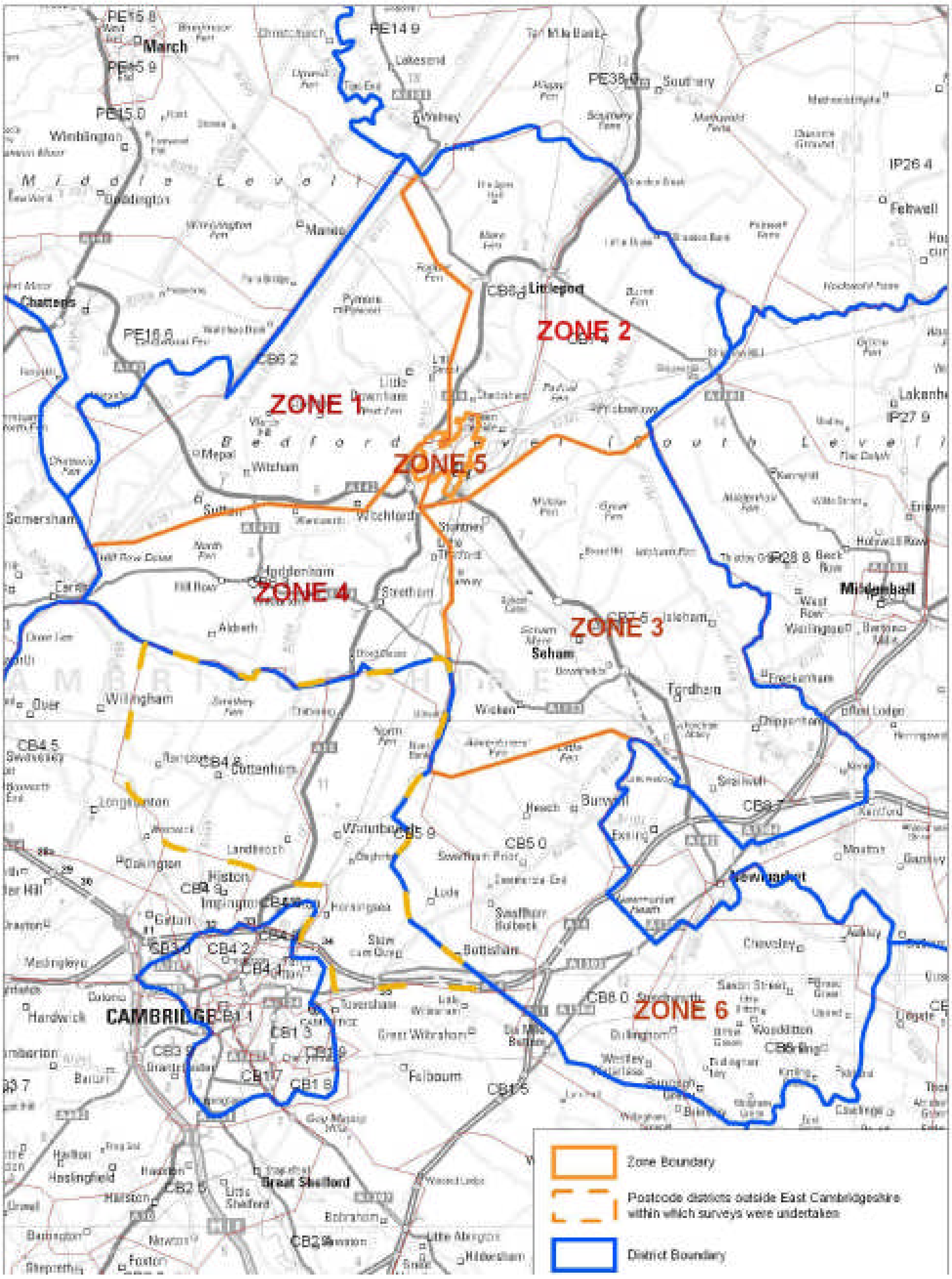
APPENDIX 1: Map of Study Area

Figure 1.0: Map of Study Area



Source: East Cambridgeshire Retail Survey 2005

APPENDIX TWO: Ely City Centre

Table 2.1: Ely City Centre - Diversity of uses

Comparison		Floorspace	Area %	Base %	Index
	Antique Shops	1,800	0.49	0.22	226
	Art & Art Dealers	3,800	1.03	0.37	276
	Booksellers	2,200	0.59	0.45	132
	Carpets & Flooring	2,300	0.62	0.59	106
	Catalogue Showrooms	4,500	1.22	0.54	225
	Charity Shops	7,800	2.11	1.41	150
	Chemist & Drugstores	8,400	2.27	1.56	145
	Childrens & Infants Wear	0	0.00	0.37	0
	Clothing General	25,000	6.75	3.69	183
	Crafts, Gifts, China & Glass	3,300	0.89	0.74	120
	Cycles & Accessories	1,100	0.30	0.17	175
	Department & Variety Stores	0	0.00	4.63	0
	DIY & Home Improvement	1,100	0.30	1.23	24
	Electrical & Other Durable Goods	3,000	0.81	1.29	63
	Florists	700	0.19	0.28	68
	Footwear	7,100	1.92	0.97	197
	Furniture Fitted	0	0.00	0.39	0
	Furniture General	5,400	1.46	1.52	96
	Gardens & Equipment	0	0.00	0.07	0
	Greeting Cards	2,600	0.70	0.58	121
	Hardware & Household Goods	29,200	7.89	3.03	261
	Jewellery, Watches & Silver	2,100	0.57	0.76	74
	Ladies & Mens Wear & Acc.	0	0.00	1.45	0
	Ladies Wear & Accessories	17,300	4.67	2.82	166
	Leather & Travel Goods	0	0.00	0.10	0
	Mens Wear & Accessories	1,300	0.35	0.71	50
	Music & Musical Instruments	0	0.00	0.06	0
	Music & Video Recordings	0	0.00	0.30	0
	Newsagents & Stationers	7,400	2.00	0.93	216
	Office Supplies	0	0.00	0.08	0
	Other Comparison Goods	2,200	0.59	0.63	94
	Photographic & Optical	0	0.00	0.09	0
	Secondhand Goods, Books, etc.	400	0.11	0.12	90
	Sports, Camping & Leisure Goods	11,800	3.19	1.10	289
	Telephones & Accessories	1,500	0.41	0.63	64
	Textiles & Soft Furnishings	1,600	0.43	0.56	77
	Toiletries, Cosmetics & Beauty Products	6,800	1.84	0.87	212
	Toys, Games & Hobbies	2,700	0.73	0.73	100
	Vehicle & Motorcycle Sales	0	0.00	0.60	0
	Vehicle Accessories	0	0.00	0.25	0
	Totals	**164,400**	**44.41**	**36.88**	**120**

Convenience	Floorspace	Area %	Base %	Index
Bakers & Confectioners	2,700	0.73	0.84	86
Butchers	1,800	0.49	0.35	138
CTN	0	0.00	0.21	0
Convenience Stores	3,000	0.81	1.14	71
Fishmongers	0	0.00	0.05	0
Frozen Foods	5,600	1.51	0.76	198
Greengrocers	0	0.00	0.15	0
Grocers & Delicatessens	2,900	0.78	0.49	161
Health Foods	4,100	1.11	0.27	411
Markets	0	0.00	0.85	0
Off Licences	0	0.00	0.27	0
Shoe Repairs Etc	800	0.22	0.12	180
Supermarkets	17,600	4.75	8.74	54
Total Convenience	**38,500**	**10.40**	**14.25**	**73**

Retail Service	Floorspace	Area %	Base %	Index
Clothing & Fancy Dress Hire	0	0.00	0.04	0
Dry Cleaners & Launderettes	1,200	0.32	0.36	89
Filling Stations	0	0.00	0.11	0
Health & Beauty	14,400	3.89	3.35	116
Opticians	3,500	0.95	0.79	120
Other Retail Services	0	0.00	0.34	0
Photo Processing	900	0.24	0.06	392
Photo Studio	0	0.00	0.08	0
Post Offices	2,400	0.65	0.47	139
Repairs, Alterations & Restoration	600	0.16	0.08	211
Travel Agents	4,200	1.13	0.54	209
TV, Cable & Video Rental	0	0.00	0.00	0
Vehicle Rental	0	0.00	0.05	0
Vehicle Repairs & Services	0	0.00	0.65	0
Video Tape Rental	2,100	0.57	0.17	335
Totals	**29,300**	**7.91**	**7.08**	**112**

Other Retail	Floorspace	Area %	Base %	Index
Other Retail Outlets	**0**	**0.00**	**0.11**	**0**

Leisure Services	Floorspace	Area %	Base %	Index
Bars & Wine Bars	1,800	0.49	1.79	27
Bingo & Amusements	0	0.00	0.95	0
Cafes	17,700	4.78	1.98	242
Casinos & Betting Offices	1,600	0.43	1.04	42
Cinemas, Theatres & Concert Halls	0	0.00	1.60	0
Clubs	6,700	1.81	1.25	145
Disco, Dance & Nightclubs	4,200	1.13	0.53	216
Fast Food & Take Away	6,800	1.84	2.56	72
Hotels & Guest Houses	8,000	2.16	1.86	116
Public Houses	16,600	4.48	3.85	116
Restaurants	14,800	4.00	3.75	107
Sports & Leisure Facilities	400	0.11	1.51	7
Totals	**78,600**	**21.23**	**22.67**	**94**

Financial & Business Services	Floorspace	Area %	Base %	Index
Building Societies	4,200	1.13	0.39	289
Building Supplies & Services	0	0.00	0.51	0
Business Goods & Services	0	0.00	0.05	0
Employment & Careers	0	0.00	0.31	0
Financial Services	4,600	1.24	0.77	161
Legal Services	10,200	2.76	0.79	348
Other Business Services	2,100	0.57	0.42	134
Printing & Copying	800	0.22	0.20	109
Property Services	12,200	3.30	1.82	181
Retail Banks	13,000	3.51	3.11	113
Totals	**47,100**	**12.72**	**8.37**	**152**

Vacant Outlets				
Vacant Retail & Service Outlets	**12,300**	**3.32**	**10.02**	**33**
Total Floorspace	**370,200**			

Source: Experian Goad City Centre Report 2011

Table 2.2: Ely City Centre - Multiple Counts and Floorspace by Sector

Floorspace Sq Ft	Outlets	Area %	Base %	Index
Comparison	96,300	54.31	48.20	113
Convenience	30,300	17.09	21.82	78
Retail Service	11,700	6.60	4.99	132
Leisure Services	18,200	10.27	16.05	64
Financial & Business Services	20,800	11.73	8.94	131
Total Multiple Floorspace	**177,300**			

Source: Experian Goad City Centre Report 2011

Table 2.3: Ely City Centre - Key Attractors

- Argos
- Boots the Chemist
- Dorothy Perkins
- New Look
- Superdrug
- Sainsbury's
- W H Smith
- Waitrose
- Wilkinson
- Sports Direct
- Fat Face
- Peacocks

Source: East Cambridgeshire District Council Retail Survey 2011

APPENDIX THREE: Soham and Littleport Town Centres

Table 3.1 Soham Experian Goad Sector Classifications by Unit Count

	Outlets	% of Total Outlets	UK Average (%)
Comparison	11	18	33.27
Convenience	8	13	8.11
Retail Service	16	26	13.34
Leisure Service	15	25	21.83
Financial & Business Services	9	15	10.93
Vacant	2	3	12.18

Source: East Cambridgeshire District Council Retail Survey 2011

Table 3.2 Littleport Experian Goad Sector Classifications by Unit Count

	Number of Units	% of Total Units	UK Average (%)
Comparison	11	31	33.27
Convenience	5	14	8.11
Retail Service	6	17	13.34
Leisure Service	8	23	21.83
Financial & Business Services	3	9	10.93
Vacant	2	6	12.18

Source: East Cambridgeshire District Council Retail Survey 2011

Table 3.3: Soham Experian Goad Comparison Sector Classifications with zero Representation

Antique shops	Furniture fitted	Office supplies
Art & art dealers	Gardens & equipment	Other comparison goods
Carpets & flooring	Greeting cards	Photographic & optical
Catalogue showrooms	Jewellery, watches & silver	Secondhand goods, books etc
Childrens & infants wear	Ladies & menswear & acc	Sports, camping & leisure goods
Clothing general	Leather & travel goods	Telephones & accessories
Crafts, gifts, china & glass	Menswear & accessories	Textiles & soft furnishings
Department & variety stores	Music & musical instruments	Toiletries, cosmetics & beauty products
Electrical & other durable goods	Music & video recordings	Toys, games & hobbies
Footwear	Newsagents & stationers	Vehicle accessories

Source: East Cambridgeshire District Council Retail Survey 2011

Table 3.4: Littleport Experian Goad Comparison Sector Classifications with Zero Representation

Antique shops	Florists	Office supplies
Art & art dealers	Footwear	Other comparison goods
Booksellers	Furniture general	Photographic & optical
Carpets & flooring	Greeting cards	Secondhand goods, books etc
Catalogue showrooms	Jewellery, watches & silver	Textiles & soft furnishings
Childrens & infants wear	Ladies & Mans wear & acc	Toiletries, cosmetics & beauty products
Clothing general	Leather & travel goods	Vehicle & motorcycle sales
Cycles & accessories	Music & musical instruments	Vehicle accessories
Department & variety stores	Music & video recordings	
DIY and home improvement	Telephones & accessories	

Source: East Cambridgeshire District Council Retail Survey 2011

APPENDIX FOUR - Household Survey Questionnaire

	supermarket		clothes/shoes		retail sheds last year		
	main [6]	other [8]	main [10]	other [12]	first [14]	second [16]	third [18]
No place/ don't buy	1	1	1	1	1	1	1
Tesco, Ely	2	2					
Waitrose, Ely	3	3					
Asda, Cambridge	4	4					
Tesco, Milton	5	5					
Sainsbury, Bury	6	6					
Tesco, St Sav'rs, Bury	7	7					
Tesco, Newmarket	8	8					
Waitrose, Newmarket	9	9					
Ely	10	10	10	10	10	10	10
Cambridge	11	11	11	11	11	11	11
Kings Lynn	12	12	12	12	12	12	12
Newmarket	13	13	13	13	13	13	13
Peterborough	14	14	14	14	14	14	14
Littleport	15	15	15	15	15	15	15
Soham	16	16	16	16	16	16	16
March	17	17	17	17	17	17	17
Bottisham	18	18	18	18	18	18	18
Burwell	19	19	19	19	19	19	19
Fordham	20	20	20	20	20	20	20
Other location (WRITE IN)							
	[20]	[21]			[22]	[23]	[24]
Sainsbury	A	A					
Tesco	B	B					
Waitrose	C	C					
Somerfield	D	D					
Co-Op	E	D					
B&Q			>>>>>>>>	>>>>>>>>	M	M	M
Homebase					N	N	N
Comet					O	O	O
Focus					P	P	P
Argos					R	R	R
WRITE IN IF OTHER							
	[25]		[26]		[27]	[28]	[29]
car	1		1		1	1	1
bus/ rail/ taxi	2		2		2	2	2
walk/bicycle	3		3		3	3	3
motorcycle/ other	4		4		4	4	4

Now, the following questions apply to the main centre that you use for clothes and shoes Just to check, that was ______________________ First, why do you shop in this centre? *(MULTICODE, DO NOT PROMPT)* close to home close to work to visit a specific shop *(SPECIFY)* good selection / quality of shops good prices/ discounts easy car parking free car parking convenient bus service convenient rail service pleasant place to shop everything under one roof other *(WRITE IN)*	 [35] 1 2 3 4 5 6 7 8 9 A B	Now, I'd like to ask some questions to make sure we have interviewed a good cross section of people. First, what is the sex of the principal wage earner in your household? male female	 [46] 1 2
		Occupation of the principal wage earner?	[47]
What, if anything, do you dislike about that centre? *(MULTICODE, DO NOT PROMPT)* nothing/ very little too far from home/ work difficult to get to by car parking difficult parking expensive difficult to get to by public transport expensive place to shop lack of chain stores/ multiples lack of department store (s) lack of covered malls/ arcades no market lack of pubs/restaurants/cafes traffic litter too large other *(WRITE IN)*	[39] 1 2 3 4 5 6 7 8 9 A B C D E F	Does your household have the use of a car? no car one car two or more cars	[48] 1 2 3
		Finally, can I check your address? Is it? And what is the Postcode?	[49]

APPENDIX 5 - Household Survey Results

TABLE 1: MAIN SUPERMARKET

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
Total respondents	805	139	98	188	86	140	154
	%	%	%	%	%	%	%
No place/don't buy	-	-	-	-	-	-	-
Tesco, Ely	50.4	70.5	66.3	36.7	75.6	72.1	5.2
Waitrose, Ely	8.9	24.5	5.1	3.7	7.0	14.3	-
Asda, Cambridge	0.7	-	2.0	1.1	-	0.7	0.6
Tesco, Milton	6.0	-	-	-	-	-	31.2
Sainsbury, Bury	0.2	-	-	1.1	-	-	-
Tesco, St Sav'rs, Bury	0.1	-	-	0.5	-	-	-
Tesco, Newmarket	8.8	-	1.0	34.0	1.2	-	3.2
Waitrose, Newmarket	1.2	-	-	2.7	-	-	3.2
smaller stores:							
Ely	0.2	-	1.0	-	-	0.7	-
Greater Cambridge	12.7	3.6	2.0	3.2	7.0	4.3	50.0
Kings Lynn	0.5	0.7	1.0	-	-	1.4	-
Newmarket	0.9	0.7	-	2.1	1.2	0.7	-
Peterborough	-	-	-	-	-	-	-
Bury St Edmunds	-	-	-	-	-	-	-
Huntingdon	-	-	-	-	-	-	-
Littleport	2.1	-	16.3	-	-	0.7	-
Soham	2.4	-	-	10.1	-	-	-
March	0.2	-	-	-	1.2	0.7	-
Bottisham	-	-	-	-	-	-	-
Burwell	-	-	-	-	-	-	-
Fordham	-	-	-	-	-	-	-
Elsewhere East Cambs	0.9	-	-	1.6	1.2	-	1.9
Elsewhere	2.5	-	5.1	0.5	3.5	2.9	4.5
Mail order/internet	1.1	-	-	2.7	2.3	1.4	-

TABLE 2: OTHER SUPERMARKET

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
Total respondents	758	130	89	180	79	132	148
	%	%	%	%	%	%	%
No place/don't buy	23.6	21.5	27.0	13.9	30.4	26.5	29.1
Tesco, Ely	11.6	16.2	12.4	15.6	11.4	11.4	2.7
Waitrose, Ely	19.5	46.9	19.1	3.3	34.2	26.5	1.4
Asda, Cambridge	1.8	-	1.1	2.2	-	2.3	4.1
Tesco, Milton	2.1	-	-	1.1	1.3	3.0	6.1
Sainsbury, Bury	0.5	-	-	2.2	-	-	-
Tesco, St Sav'rs, Bury	0.1	-	-	0.6	-	-	-
Tesco, Newmarket	5.0	1.5	1.1	16.1	1.3	-	3.4
Waitrose, Newmarket	2.4	0.8	1.1	5.0	-	-	4.7
smaller stores:							
Ely	2.8	3.8	4.5	1.7	2.5	4.5	0.7
Greater Cambridge	10.2	3.8	1.1	2.2	12.7	7.6	31.8
Kings Lynn	1.5	2.3	3.4	-	-	3.8	-
Newmarket	2.5	0.8	1.1	5.6	-	1.5	3.4
Peterborough	0.3	-	-	-	-	1.5	-
Bury St Edmunds	0.1	0.8	-	-	-	-	-
Huntingdon	-	-	-	-	-	-	-
Littleport	2.6	-	21.3	-	-	0.8	-
Soham	4.7	-	1.1	19.4	-	-	-
March	0.9	-	-	-	5.1	2.3	-
Bottisham	0.1	-	-	-	-	0.8	-
Burwell	-	-	-	-	-	-	-
Fordham	0.1	-	-	-	-	0.8	-
Elsewhere East Cambs	2.8	-	-	8.3	-	-	4.1
Elsewhere	4.4	1.5	5.6	2.8	1.3	6.1	8.1
Mail order/internet	0.3	-	-	-	-	0.8	0.7

TABLE 3: MARKET SHARES FOR SUPERMARKETS

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
	%	%	%	%	%	%	%
Tesco, Ely	41.4	57.6	54.5	31.4	61.8	58.1	4.9
Waitrose, Ely	13.2	33.6	10.2	3.8	16.8	19.7	0.5
Asda, Cambridge	1.2	-	1.9	1.5	-	1.3	1.9
Tesco, Milton	5.1	-	-	0.4	0.4	1.0	25.6
Sainsbury, Bury	0.4	-	-	1.5	-	-	-
Tesco, St Sav'rs, Bury	0.1	-	-	0.6	-	-	-
Tesco, Newmarket	8.2	0.5	1.1	29.7	1.3	-	3.6
Waitrose, Newmarket	1.7	0.3	0.4	3.5	-	-	4.1
smaller stores:							
Ely	1.1	1.3	2.3	0.5	0.8	2.1	0.2
Greater Cambridge	12.8	3.9	1.9	3.0	9.6	5.8	48.7
Kings Lynn	0.9	1.3	1.9	-	-	2.4	-
Newmarket	1.5	0.8	0.4	3.3	0.9	1.0	1.2
Peterborough	0.1	-	-	-	-	0.5	-
Bury St Edmunds	0.0	0.3	-	-	-	-	-
Huntingdon	-	-	-	-	-	-	-
Littleport	2.5	-	19.4	-	-	0.8	-
Soham	3.3	-	0.4	13.6	-	-	-
March	0.5	-	-	-	2.6	1.3	-
Bottisham	0.0	-	-	-	-	0.3	-
Burwell	-	-	-	-	-	-	-
Fordham	0.0	-	-	-	-	0.3	-
Elsewhere East Cambs	1.6	-	-	3.9	0.9	-	2.9
Elsewhere	3.3	0.5	5.7	1.3	3.1	4.2	6.2
Mail order/internet	0.9	-	-	1.9	1.8	1.3	0.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0

TABLE 4: MAIN CLOTHES/SHOES

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
Total respondents	804	139	98	187	86	140	154
	%	%	%	%	%	%	%
No place/don't buy	1.9	-	5.1	1.1	2.3	2.9	1.3
Ely	24.1	33.1	25.5	19.3	36.0	32.9	6.5
Greater Cambridge	44.5	42.4	34.7	36.9	41.9	37.9	69.5
Kings Lynn	2.6	2.9	12.2	0.5	1.2	2.1	-
Newmarket	7.0	7.9	1.0	16.0	1.2	2.9	5.8
Peterborough	4.7	7.2	3.1	0.5	5.8	12.9	0.6
Bury St Edmunds	5.7	1.4	4.1	17.1	3.5	2.1	1.3
Huntingdon	0.2	-	-	-	-	0.7	0.6
Littleport	0.1	-	1.0	-	-	-	-
Soham	-	-	-	-	-	-	-
March	-	-	-	-	-	-	-
Bottisham	-	-	-	-	-	-	-
Burwell	-	-	-	-	-	-	-
Fordham	-	-	-	-	-	-	-
Elsewhere East Cambs	-	-	-	-	-	-	-
Elsewhere	5.2	2.9	5.1	4.8	5.8	4.3	8.4
Mail order/internet	3.9	2.2	8.2	3.7	2.3	1.4	5.8

TABLE 5: OTHER CLOTHES/SHOES

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
Total respondents	736	132	91	171	76	127	139
	%	%	%	%	%	%	%
No place/don't buy	35.1	33.3	39.6	27.5	31.6	31.5	48.2
Ely	8.8	5.3	9.9	9.4	14.5	8.7	7.9
Greater Cambridge	18.1	22.7	9.9	22.8	18.4	19.7	11.5
Kings Lynn	3.3	3.8	13.2	0.6	2.6	2.4	0.7
Newmarket	7.2	3.0	3.3	13.5	6.6	4.7	8.6
Peterborough	7.5	9.1	8.8	1.8	6.6	15.0	5.8
Bury St Edmunds	6.1	4.5	3.3	12.3	7.9	3.1	3.6
Huntingdon	0.1	-	-	-	-	0.8	-
Littleport	-	-	-	-	-	-	-
Soham	-	-	-	-	-	-	-
March	0.1	-	-	-	-	0.8	-
Bottisham	-	-	-	-	-	-	-
Burwell	-	-	-	-	-	-	-
Fordham	-	-	-	-	-	-	-
Elsewhere East Cambs	-	-	-	-	-	-	-
Elsewhere	10.1	14.4	6.6	9.4	9.2	7.9	11.5
Mail order/internet	3.7	3.8	5.5	2.9	2.6	5.5	2.2

TABLE 6: MARKET SHARES FOR CLOTHES/SHOES

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
	%	%	%	%	%	%	%
Ely	22.5	28.9	25.1	18.5	32.5	29.6	8.1
Greater Cambridge	42.4	41.0	31.4	37.1	40.4	36.5	63.0
Kings Lynn	3.3	3.6	15.5	0.5	1.6	3.0	0.2
Newmarket	7.3	6.4	1.8	15.7	2.8	3.4	7.0
Peterborough	6.0	7.9	5.8	0.9	6.8	14.7	2.4
Bury St Edmunds	6.5	2.7	4.3	16.7	5.6	3.2	2.2
Huntingdon	0.2	-	-	-	-	0.7	0.4
Littleport	0.1	-	0.7	-	-	-	-
Soham	-	-	-	-	-	-	-
March	0.0	-	-	-	-	0.3	-
Bottisham	-	-	-	-	-	-	-
Burwell	-	-	-	-	-	-	-
Fordham	-	-	-	-	-	-	-
Elsewhere East Cambs	-	-	-	-	-	-	-
Elsewhere	7.1	6.5	5.7	6.5	7.6	5.7	10.3
Mail order/internet	4.6	2.9	9.7	4.0	2.8	3.0	6.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0

TABLE 7: FIRST RETAIL WAREHOUSE

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
Total respondents	796	138	96	186	86	138	152
	%	%	%	%	%	%	%
No place/don't buy	28.0	37.0	40.6	16.7	23.3	31.9	25.0
Ely	8.7	13.8	15.6	5.4	10.5	8.7	2.6
Greater Cambridge	33.8	19.6	20.8	17.2	43.0	37.0	67.1
Kings Lynn	0.8	-	4.2	-	-	1.4	-
Newmarket	22.1	25.4	12.5	50.5	16.3	9.4	5.3
Peterborough	0.1	-	-	-	-	0.7	-
Bury St Edmunds	2.8	2.2	1.0	8.6	1.2	0.7	-
Huntingdon	1.6	-	1.0	-	4.7	5.8	-
Littleport	-	-	-	-	-	-	-
Soham	-	-	-	-	-	-	-
March	0.5	-	-	-	1.2	2.2	-
Bottisham	-	-	-	-	-	-	-
Burwell	-	-	-	-	-	-	-
Fordham	-	-	-	-	-	-	-
Elsewhere East Cambs	-	-	-	-	-	-	-
Elsewhere	1.4	2.2	4.2	0.5	-	2.2	-
Mail order/internet	0.3	-	-	1.1	-	-	-

TABLE 8: SECOND RETAIL WAREHOUSE

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
Total respondents	778	137	94	179	83	135	150
	%	%	%	%	%	%	%
No place/don't buy	56.0	56.2	66.0	50.3	60.2	56.3	54.0
Ely	2.8	3.6	4.3	3.4	3.6	1.5	1.3
Greater Cambridge	24.4	21.9	16.0	22.3	21.7	22.2	38.0
Kings Lynn	1.9	0.7	7.4	0.6	-	4.4	-
Newmarket	9.0	10.9	4.3	15.6	9.6	5.9	4.7
Peterborough	0.6	0.7	-	-	-	3.0	-
Bury St Edmunds	3.1	2.9	1.1	7.8	1.2	1.5	1.3
Huntingdon	1.2	2.2	-	-	3.6	2.2	-
Littleport	-	-	-	-	-	-	-
Soham	-	-	-	-	-	-	-
March	-	-	-	-	-	-	-
Bottisham	-	-	-	-	-	-	-
Burwell	-	-	-	-	-	-	-
Fordham	-	-	-	-	-	-	-
Elsewhere East Cambs	-	-	-	-	-	-	-
Elsewhere	0.9	0.7	1.1	-	-	3.0	0.7
Mail order/internet	-	-	-	-	-	-	-

TABLE 9: THIRD RETAIL WAREHOUSE

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
Total respondents	759	131	95	175	82	131	145
	%	%	%	%	%	%	%
No place/don't buy	82.5	82.4	92.6	76.6	81.7	82.4	83.4
Ely	1.6	2.3	1.1	3.4	-	0.8	0.7
Greater Cambridge	9.4	6.9	2.1	9.1	14.6	8.4	14.5
Kings Lynn	0.9	0.8	3.2	-	-	2.3	-
Newmarket	2.4	2.3	1.1	5.7	2.4	1.5	-
Peterborough	0.3	0.8	-	-	-	0.8	-
Bury St Edmunds	1.6	2.3	-	5.1	-	-	-
Huntingdon	0.9	1.5	-	-	-	3.8	-
Littleport	-	-	-	-	-	-	-
Soham	-	-	-	-	-	-	-
March	0.1	-	-	-	1.2	-	-
Bottisham	-	-	-	-	-	-	-
Burwell	-	-	-	-	-	-	-
Fordham	-	-	-	-	-	-	-
Elsewhere East Cambs	-	-	-	-	-	-	-
Elsewhere	0.3	0.8	-	-	-	-	0.7
Mail order/internet	-	-	-	-	-	-	-

TABLE 10: FIRST RWH OPERATOR

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
Total respondents	558	85	55	155	64	86	113
	%	%	%	%	%	%	%
B&Q	32.1	21.2	36.4	15.5	28.1	51.2	48.7
Homebase	41.0	48.2	25.5	61.3	37.5	24.4	30.1
Comet	2.7	2.4	1.8	1.9	1.6	5.8	2.7
Focus	-	-	-	-	-	-	-
Argos	17.9	24.7	27.3	13.5	26.6	14.0	12.4
Currys	2.3	1.2	-	3.9	-	1.2	4.4
Other	3.9	2.4	9.1	3.9	6.3	3.5	1.8

TABLE 11: SECOND RWH OPERATOR

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
Total respondents	326	54	31	88	32	53	68
	%	%	%	%	%	%	%
B&Q	28.5	29.6	29.0	26.1	37.5	24.5	29.4
Homebase	42.3	51.9	45.2	36.4	46.9	49.1	33.8
Comet	2.1	-	-	4.5	3.1	-	2.9
Focus	-	-	-	-	-	-	-
Argos	16.0	7.4	19.4	22.7	12.5	11.3	17.6
Currys	1.8	-	-	3.4	-	3.8	1.5
Other	9.2	11.1	6.5	6.8	-	11.3	14.7

TABLE 12: THIRD RWH OPERATOR

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
Total respondents	121	21	4	41	13	20	22
	%	%	%	%	%	%	%
B&Q	21.5	28.6	25.0	22.0	23.1	20.0	13.6
Homebase	22.3	23.8	50.0	24.4	30.8	30.0	-
Comet	9.1	9.5	-	7.3	7.7	15.0	9.1
Focus	-	-	-	-	-	-	-
Argos	27.3	19.0	25.0	31.7	7.7	20.0	45.5
Currys	6.6	4.8	-	4.9	7.7	-	18.2
Other	13.2	14.3	-	9.8	23.1	15.0	13.6

TABLE 13: COMPOSITE MARKET SHARES FOR COMPARISON SHOPPING

	Total
	%
Ely	23.9
Cambridge	39.7
Kings Lynn	3.0
Newmarket	6.6
Peterborough	5.5
Bury St Edmunds	6.1
Huntingdon	0.2
Littleport	0.1
Soham	-
March	0.0
Bottisham	-
Burwell	-
Fordham	-
Other RWH	4.1
Elsewhere East Cambs	-
Elsewhere	6.5
Mail order/internet	4.2
TOTAL	100.0

TABLE 14: TRANSPORT TO MAIN SUPERMARKET

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
Total respondents	795	139	98	183	84	139	152
	%	%	%	%	%	%	%
car	90.2	79.9	85.7	95.1	92.9	95.0	90.8
bus/rail/taxi	2.9	1.4	4.1	1.1	3.6	2.9	5.3
walk/bicycle	6.2	18.7	10.2	3.3	1.2	0.7	3.3
motorcycle/other	0.8	-	-	0.5	2.4	1.4	0.7

TABLE 15: TRANSPORT TO MAIN CLOTHES/SHOES

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
Total respondents	748	133	84	175	82	135	139
	%	%	%	%	%	%	%
car	84.1	65.4	85.7	93.7	89.0	89.6	80.6
bus/rail/taxi	10.2	12.8	13.1	5.7	7.3	7.4	15.8
walk/bicycle	4.7	21.8	1.2	-	2.4	1.5	0.7
motorcycle/other	1.1	-	-	0.6	1.2	1.5	2.9

TABLE 16: TRANSPORT TO FIRST RWH

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
Total respondents	549	85	55	143	64	93	109
	%	%	%	%	%	%	%
car	96.9	91.8	94.5	99.3	100.0	97.8	96.3
bus/rail/taxi	1.5	-	5.5	0.7	-	1.1	2.8
walk/bicycle	1.5	8.2	-	-	-	1.1	-
motorcycle/other	0.2	-	-	-	-	-	0.9

TABLE 17: TRANSPORT TO SECOND RWH

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
Total respondents	336	58	33	86	33	58	68
	%	%	%	%	%	%	%
car	98.5	98.3	100.0	100.0	100.0	98.3	95.6
bus/rail/taxi	1.2	-	-	-	-	1.7	4.4
walk/bicycle	0.3	1.7	-	-	-	-	-
motorcycle/other	-	-	-	-	-	-	-

TABLE 18: TRANSPORT TO THIRD RWH

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
Total respondents	140	25	7	42	15	25	26
	%	%	%	%	%	%	%
car	97.1	96.0	100.0	100.0	100.0	96.0	92.3
bus/rail/taxi	1.4	-	-	-	-	-	7.7
walk/bicycle	0.7	4.0	-	-	-	-	-
motorcycle/other	0.7	-	-	-	-	4.0	-

TABLE 19: WHY SHOP IN MAIN (CL/SH) CENTRE?

	Ely	Gtr Cambridge	Newmarket	Peterborough	Bury
Total respondents	193	351	54	38	44
	%	%	%	%	%
close to home	72.0	43.9	33.3	5.3	15.9
close to work	5.2	7.4	1.9	-	-
to visit a specific shop	6.2	10.3	13.0	10.5	11.4
good selection/quality of shops	14.5	50.1	35.2	57.9	31.8
good prices/discounts	4.1	1.1	5.6	-	4.5
easy car parking	5.7	4.8	16.7	39.5	38.6
free car parking	7.8	0.6	5.6	10.5	2.3
convenient bus service	2.6	2.8	1.9	-	2.3
convenient rail service	-	1.4	-	13.2	-
pleasant place to shop	19.7	12.8	33.3	13.2	47.7
everything under one roof	2.1	3.1	3.7	21.1	-
just familiar,have family/friend	5.7	8.0	13.0	-	15.9
other	1.6	0.6	-	-	-

TABLE 20: DISLIKES ABOUT MAIN CENTRE

	Ely	Gtr Cambridge	Newmarket	Peterborough	Bury
Total respondents	191	344	55	38	46
	%	%	%	%	%
nothing/very little	57.6	39.0	52.7	89.5	87.0
too far from home/work	-	0.6	-	2.6	-
difficult to get to by car	-	1.7	-	-	-
parking difficult	13.1	21.8	27.3	2.6	8.7
parking expensive	0.5	25.0	9.1	-	2.2
difficult to get to by pub trans	1.0	1.5	1.8	-	-
expensive place to shop	1.0	2.0	1.8	-	-
lack of chain stores/multiples	22.0	4.4	1.8	2.6	2.2
lack of department stores	5.8	2.3	-	5.3	2.2
lack of covered malls/arcades	1.0	-	-	-	2.2
no market	-	-	-	-	-
lack of pubs/restaurants/cafes	0.5	0.3	-	-	-
traffic	3.1	11.0	14.5	-	-
litter	0.5	0.3	1.8	-	-
too large	1.0	3.8	-	-	-
gen ambience,crowded,rude peopl	2.6	7.8	1.8	-	-
distance from Grafton to others	-	3.8	-	-	-
wrong shops, wrong people, etc	4.2	3.5	1.8	2.6	-
other	-	-	-	-	-

TABLE 21: SEX OF MAIN INCOME EARNER

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
Total respondents	786	135	96	181	85	136	153
	%	%	%	%	%	%	%
male	69.0	71.9	67.7	74.6	67.1	66.9	63.4
female	31.0	28.1	32.3	25.4	32.9	33.1	36.6

* Census 2001 Table CAS003

TABLE 22: OCCUPATION OF MAIN INCOME EARNER

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
Total respondents	801.0	138.0	96.0	187.0	86.0	140.0	154.0
	%	%	%	%	%	%	%
professional	9.1	10.9	7.3	4.8	10.5	8.6	13.6
intermediate	21.8	21.0	18.8	27.8	18.6	22.1	18.8
skilled non-manual	6.1	7.2	3.1	5.3	8.1	6.4	6.5
skilled manual	18.1	13.8	20.8	23.5	23.3	16.4	12.3
semi skilled	5.6	3.6	9.4	5.9	5.8	5.0	5.2
unskilled	0.9	-	2.1	0.5	-	2.9	-
military	1.2	1.4	3.1	-	1.2	1.4	1.3
retired	35.2	38.4	35.4	29.9	31.4	35.0	40.9
unemployed	1.5	2.9	-	1.6	1.2	1.4	1.3
housewife, etc	0.4	0.7	-	0.5	-	0.7	-

TABLE 23: DOES HOUSEHOLD HAVE CAR?

	Total	Ely (Zone 5)	Northeast (Zone 2)	East (Zone 3)	West (Zone 4)	Northwest (Zone 1)	South (Zone 6)
Total respondents	805	139	98	188	86	140	154
	%	%	%	%	%	%	%
no car	13.9	20.9	18.4	8.5	8.1	12.9	15.6
one car	42.9	51.1	41.8	39.9	39.5	45.0	39.6
two or more cars	43.2	28.1	39.8	51.6	52.3	42.1	44.8

* Census 2001 Table CAS062

APPENDIX SIX- Ely Shoppers Survey

1 First, can I ask what is the main purpose of your visit to the Town Centre today? Is it.. ..	[6]
supermarket shopping	A
shopping for food and groceries at other shops	B
shopping for clothes/shoes	C
visit the market	D
other forms of shopping	E
visiting pub/ cafe/ restaurant	F
visiting bank or building society	G
leisure / recreation	H
education	I
work here	J
other *(WRITE IN)*	
2 How did you travel here today?	[8]
walk	1
cycle	2
own car	3
other car	4
taxi	5
bus	6
train	7
other *(WRITE IN)*	
3 How long did your journey take?	[9]
(door to door) 0 - 10 mins	A
10 - 20 mins	B
20 - 30 mins	C
30 - 45 mins	D
45 mins plus	E
4 Did you experience any problems travelling into the town centre today?	[10]
Yes	1
No	2
If yes, what was the MAIN problem?	[11]
locating a car parking space	1
traffic congestion	2
other *(SPECIFY)*	

5 Is the location of the bus stops in the town centre convenient?	[13]
convenient	A
adequate	B
inconvenient	C
don't know	D
6 *(TO ALL)* How often do you come to *(THIS)* Town Centre?	[14]
more than once a week	A
once a week	B
once every 2 to 3 weeks	C
monthly	D
less often/not regularly	E
this is the first time	F
7 How long do you intend to stay in the Town Centre from the time you first arrived?	[15]
less than 30 minutes	1
30 - 59 minites	2
between 1 - 2 hours	3
between 2 - 3 hours	4
between 3 - 4 hours	5
Over 4 hours	6
8 Which other place do you visit most frequently for shopping?	[16]
Ely	#VALUE!
Soham	#VALUE!
Littleport	#VALUE!
Cambridge	#VALUE!
Newmarket	5
Bury St Edmunds	6
Norwich	7
Kings Lynn	8
Other *(WRITE IN)*	
9 How do you rate the shopping experience here compared with that other centre (in Q13)	[18]
much better	A
better	B
same	C
worse	D
much worse	E

IF THIS IS THE MAIN SHOPPING CENTRE	[20]
10 Why do you use this Town Centre? *(MULTICODE, DO NOT PROMPT)*	
close to home	1
close to work	2
easy to get to	3
good public transport links	4
sufficient car parking	5
reasonably priced car parking	6
good selection/quality of shops	7
good mix of shopping and leisure facilities	8
to visit specific shop(s) *(NAME)*	9
pleasant shopping environment (general ambience)	D
good standard of street cleanliness	E
visit the market	F
safe shopping environment	G
other *(WRITE IN)*	

11 Is there anything you particularly <u>dislike</u> about this Town Centre? *(MULTICODE, DO NOT PROMPT)*	[24]
no, nothing	1
inconvenient to get to	2
public transport links are poor	3
inadequate car parking	4
expensive car parking	5
poor quality shops	8
lack of particular type of shops	9
lack of leisure facilities	A
unpleasant shopping environment (general ambience)	B
poor standard of street cleanliness	C
unsafe/threatening environment	D
other *(WRITE IN)*	

12 What non-shopping services/facilities have/will you use today? *(MULTICODE, DO NOT PROMPT)*	[28]
tourist attractions	1
sports/leisure facilities	2
museum	3
cinema	4
library	5
other *(WRITE IN)*	

13 Do you have any suggestions for improving this centre? *(MULTICODE, DO NOT PROMPT)*	[30]
no nothing	1
make the town centre easier to get to	2
provide more parking	3
more shops	4
provide better range of shops	5
provide specific shop *(NAME)*	6
provide particular leisure facility *(NAME)*	A
improve the cleanliness of the streets	F
pedestrianise particular street *(NAME)*	G
improve the pedestrian environment	
other *(WRITE IN)*	

14 Where do you live ? *(FULL ADDRESS & POSTCODE)*	[34]

15 Does your household have the use of a motor car?	[44]
yes, one car	1
yes, two or more cars	2
no, no car	3

16 What is the occupation of the main income earner in your household?	[45]

17 Sex *(OBSERVE)*	[46]
male	1
female	2

18 Age	[47]
less than 20	1
20 to 39	2
40 to 59	3
60 or over	4

APPENDIX SEVEN: Shoppers Survey Results

TABLE 1: MAIN PURPOSE OF VISIT

	Total	Ely	Littleport	Soham
Total respondents	498	299	101	98
	%	%	%	%
supermarket shopping	16	10	34	13
food & groceries at other shops	21	12	38	30
shopping for clothes/shoes	3	5	0	1
visit the market	8	12	0	2
other forms of shopping	22	28	12	13
visit pub/cafe/restaurant	2	1	0	9
visit bank or building society	9	10	5	9
leisure/recreation	8	8	6	10
education	1	2	0	0
work	9	10	5	9
other	2	1	1	3

TABLE 2: HOW LONG DID JOURNEY TAKE BY MAIN PURPOSE (ELY ONLY)

	Total	food shoppers	other shoppers	others
Total respondents	299	97	136	66
	%	%	%	%
0-10 mins	39	43	37	35
10-20 mins	40	49	39	30
20-30 mins	13	7	15	18
30-45 mins	5	1	7	8
45 mins plus	3	0	3	9

TABLE 3: POSTCODE DISTRICT OF RESIDENCE BY MAIN PURPOSE (ELY ONLY)

	Total	food shoppers	other shoppers	others
Total respondents	292	95	135	62
	%	%	%	%
CB1	0	0	0	2
CB2	0	0	1	0
CB3	1	0	2	0
CB4	5	2	8	3
CB5	2	2	3	2
CB6	50	56	45	50
CB7	33	36	35	26
CB8	0	0	0	2
PE16	2	1	4	2
other PE	2	2	2	5
other	3	1	2	10

TABLE 4: HOW OFTEN COME TO THIS CENTRE BY MAIN PURPOSE (ELY ONLY)

	Total	food shoppers	other shoppers	others
Total respondents	299	97	136	66
	%	%	%	%
more than once a week	59	67	50	67
once a week	21	22	24	12
once every 2 to 3 weeks	8	8	10	6
monthly	6	1	9	8
less often/not regularly	5	2	7	8
this is first time	0	0	1	0

TABLE 5: HOW LONG STAY IN CENTRE BY MAIN PURPOSE (ELY ONLY)

	Total	food shoppers	other shoppers	others
Total respondents	299	97	136	66
	%	%	%	%
less than 30 mins	14	17	13	14
30-59 mins	22	29	21	15
between 1-2 hours	34	42	35	20
between 2-3 hours	12	6	18	11
between 3-4 hours	7	5	9	8
over 4 hours	10	1	4	33

TABLE 6: NON-SHOPPING SERVICES/FACILITIES BY MAIN PURPOSE (ELY ONLY)

	Total	food shoppers	other shoppers	others
Total respondents	63	12	33	18
Percentage of total respondents	21	12	24	27

Of those using non-shopping services:

	%	%	%	%
tourist attractions	14	0	15	22
sports/liesure facilities	29	17	27	39
museum	5	8	3	6
cinema	8	8	12	0
library	43	67	39	33
other	3	0	3	6

TABLE 7: OCCUPATION OF MAIN INCOME EARNER BY MAIN PURPOSE (ELY ONLY)

	Total	food shoppers	other shoppers	others
Total respondents	292	94	133	65
	%	%	%	%
Professional	9	7	10	11
Intermediate	28	30	24	32
Skilled non-manual	8	4	7	15
Skilled manual	20	21	21	15
Semi skilled	5	5	5	5
Unskilled	0	0	0	0
Military	1	0	2	0
Retired	25	26	29	19
Student	1	3	0	2
Unemployed	3	3	3	2
Housewife, other	0	0	1	0

TABLE 8: HOW LONG DID YOUR JOURNEY TAKE?

	Total	Ely	Littleport	Soham
Total respondents	498	299	101	98
	%	%	%	%
0-10 mins	52	39	80	65
10-20 mins	32	40	16	24
20-30 mins	10	13	2	9
30-45 mins	4	5	2	2
45 mins plus	2	3	0	0

TABLE 9: HOW DID YOU TRAVEL HERE TODAY?

	Total	Ely	Littleport	Soham
Total respondents	498	299	101	98
	%	%	%	%
walk	36	29	45	50
cycle	4	4	7	4
own car	50	57	45	37
other car	4	4	3	5
taxi	1	1	0	2
bus	3	5	0	1
train	0	1	0	0
other	1	0	1	1

TABLE 10: PROBLEMS TRAVELLING TO TOWN CENTRE?

	Total	Ely	Littleport	Soham
Total respondents	498	299	101	98
	%	%	%	%
yes	10	10	4	17
no	90	90	96	83

TABLE 11: MAIN PROBLEM TRAVELLING TO TOWN CENTRE

	Total	Ely	Littleport	Soham
Total respondents	46	26	4	16
	%	%	%	%
locating a car parking space	28	39	0	19
traffic congestion	52	58	50	44
other (mainly snowstorms)	20	4	50	38

TABLE 12: ARE THE BUS STOPS CONVENIENT?

	Total	Ely	Littleport	Soham
Total respondents	497	298	101	98
	%	%	%	%
convenient	32	26	48	37
adequate	11	13	10	5
inconvenient	9	6	8	15
don't know	48	55	35	43

TABLE 13: HOW OFTEN DO YOU COME TO THIS CENTRE?

	Total	Ely	Littleport	Soham
Total respondents	497	299	100	98
	%	%	%	%
more than once a week	70	59	88	83
once a week	17	21	8	14
once every 2 to 3 weeks	6	8	3	2
monthly	4	6	1	0
less often/not regularly	3	5	0	0
this is first time	0	0	0	1

TABLE 14: HOW LONG DO YOU INTEND TO STAY IN THIS CENTRE?

	Total	Ely	Littleport	Soham
Total respondents	498	299	101	98
	%	%	%	%
less than 30 mins	33	14	61	60
30-59 mins	21	22	20	19
between 1-2 hours	25	34	8	12
between 2-3 hours	8	12	2	2
between 3-4 hours	5	7	5	0
over 4 hours	8	10	4	6

TABLE 15: WHAT OTHER PLACE DO YOU VISIT MOST FREQUENTLY FOR SHOPPING?

	Total	Ely	Littleport	Soham
Total respondents	421	229	95	97
	%	%	%	%
Ely	20	0	62	26
Soham	1	1	0	0
Littleport	1	2	0	0
Cambridge	31	54	1	7
Newmarket	8	11	0	7
Bury St Edmunds	3	4	1	2
Various, several	25	11	30	55

Kings Lynn	3	4	3	1
Other	9	14	3	2

TABLE 16: HOW DO YOU RATE THE SHOPPING EXPERIENCE HERE COMPARED WITH THAT OTHER CENTRE

	Total	Ely	Littleport	Soham
Total respondents	423	232	95	96
	%	%	%	%
much better	5	4	10	1
better	14	16	12	9
same	24	23	31	19
worse	37	32	37	50
much worse	16	16	10	21
just different	5	8	2	0

TABLE 17: WHY DO YOU USE THIS TOWN CENTRE?

	Total	Ely	Littleport	Soham
Total respondents	339	160	99	80
	%	%	%	%
close to home	87	84	94	83
close to work	8	7	8	9
easy to get to	19	26	14	10
good public transport links	1	1	1	0
sufficient car parking	3	5	1	0
reasonably priced car parking	4	7	1	0
good selection/quality of shops	4	8	0	0
good mix of shopping and leisure	2	2	0	3
to visit specific shops	2	2	1	1
pleasant shopping environment	4	8	0	1
good standard of street clean'ss	1	1	0	0
visit the market	1	2	0	0
safe shopping environment	2	3	0	1
other	1	0	0	3

TABLE 18: IS THERE ANYHTING YOU PARTICULARLY DISLIKE ABOUT THE TOWN CENTRE?

	Total	Ely	Littleport	Soham
Total respondents	477	285	99	93
	%	%	%	%
no, nothing	48	48	60	32
inconvenient to get to	3	3	0	9
public transport links are poor	4	4	2	9
inadequate car parking	11	14	4	8
expensive car parking	0	0	0	0
poor quality shops	16	14	7	30
lack of particular type of shops	21	21	8	36
lack of leisure facilities	3	4	3	1
unpleasant shopping environmen	6	4	4	12
poor standard of street clean'ss	5	2	2	15
unsafe/ threatening environment	4	2	10	5
other	4	5	5	2

TABLE 19: WHAT NON-SHOPPING SERVICES/FACILITIES HAVE/WILL YOU USE TODAY?
Columns.....: TOWN
Cells.......: Column %

	Total	Ely	Littleport	Soham
Total respondents	114	63	32	19
	%	%	%	%
tourist attractions	9	14	0	5
sports/liesure facilities	31	29	38	26
museum	3	5	0	0
cinema	7	8	9	0
library	59	43	78	79
other	2	3	0	0

TABLE 20: DO YOU HAVE ANY SUGGESTIONS FOR IMPROVING THIS CENTRE?

	Total	Ely	Littleport	Soham
Total respondents	485	289	100	96
	%	%	%	%
no, nothing	33	32	38	30
make the centre easier to get to	3	2	0	9
provide more parking	14	19	7	9
more shops	17	12	20	31
provide better range of shops	31	30	25	41
provide specific shops	14	15	9	14
provide particular leisure facil	5	4	5	9
improve street cleanliness	5	2	6	14
pedestrianise particular street	3	5	0	0
improve pedestrian environment	5	4	8	5
other	6	7	4	6

TABLE 21: OCCUPATION OF MAIN INCOME EARNER

	Total	Ely	Littleport	Soham
Total respondents	484	292	99	93
	%	%	%	%
Professional	7	9	1	5
Intermediate	24	28	20	15
Skilled non-manual	9	8	10	10
Skilled manual	20	20	14	27
Semi skilled	6	5	6	11
Unskilled	1	0	1	3
Military	1	1	0	1
Retired	28	25	42	23
Student	1	1	0	0
Unemployed	2	3	0	3
Housewife, other	2	0	5	2

TABLE 22: DOES HOUSEHOLD HAVE THE USE OF A CAR?

	Total	Ely	Littleport	Soham
Total respondents	497	298	101	98
	%	%	%	%
yes, one car	54	48	61	63
yes, two or more cars	28	35	15	19
no, no car	18	17	24	17

TABLE 23: POSTCODE DISTRICT OF RESIDENCE

	Total	Ely	Littleport	Soham
Total respondents	482	292	100	90
	%	%	%	%
CB1	0	0	0	1
CB2	0	0	0	0
CB3	0	1	0	0
CB4	3	5	0	0
CB5	2	2	0	0
CB6	51	50	92	8
CB7	38	33	4	89
CB8	0	0	0	1
PE16	2	2	0	0
other PE	2	2	3	0
other	2	3	1	1

Appendix 8: Comparison Retail Capacity Modelling

Table 1 Population Projections

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	All zones total
Population 2011	10,061	10,777	17,591	6,911	18,331	17,729	81,400
Population 2016	10,419	11,161	18,217	7,157	18,984	18,361	84,300
Population 2021	11,235	12,035	19,643	7,717	20,471	19,798	90,900
Population 2026	11,248	12,048	19,665	7,726	20,493	19,820	91,000
Population 2031	11,631	12,459	20,335	7,989	21,191	20,495	94,100
Change in Population 2011 - 2016							
Numeric increase	358	384	627	246	653	632	2,900
Percentage increase	3.6	3.6	3.6	3.6	3.6	3.6	4%
Change in Population 2016 - 2021							
Numeric increase	816	874	1,426	560	1,486	1,437	6,600
Percentage increase	7.8	7.8	7.8	7.8	7.8	7.8	8%
Change in Population 2021 - 2026							
Numeric increase	12	13	22	8	23	22	100
Percentage increase	0.1	0.1	0.1	0.1	0.1	0.1	0%
Change in Population 2026 - 2031							
Numeric increase	383	410	670	263	698	675	3,100
Percentage increase	3.4	3.4	3.4	3.4	3.4	3.4	3%

Notes: Population projections for the study area from the Cambridgeshire County Council Research Group

based upon the updated ECDC housing trajectory 2011-2031.
Zonal Split for Partial Review held constant for each study year, zonal split based on proportional split for each zone at 2011 in Retail Study 2005. (12.36% in Zone 1, 13.24% in Zone 2, 21.61% in Zone 3 , 8.49% in Zone 4, 22.52% in Zone 5, 21.78% in Zone 6)

Table 2 Comparison Goods Expenditure (Per Capita) (£)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
Expenditure 2011	3695	3023	3315	4526	3356	3243
2011 minus SFT	3325	2721	2984	4074	3021	2919
Estimate 2016	4053	3317	3637	4965	3682	3558
2016 minus SFT	3538	2895	3175	4335	3214	3106
Estimate 2021	4661	3814	4182	5710	4234	4092
2021 minus SFT	4083	3341	3664	5002	3709	3584
Estimate 2026	5360	4386	4809	6567	4869	4706
2026 minus SFT	4712	3856	4227	5772	4280	4136
Estimate 2031	6164	5044	5531	7552	5600	5411
2031 minus SFT	5425	4439	4867	6646	4928	4762

Notes: Expenditure data from Experian comparison expenditure estimates provided in 2010 prices.
Comparison expenditure growth rate is taken from Experian retail planner briefing note 9 (Sept 2011)
Special Forms of Trading growth rate is taken from Experian retail planner briefing note 9 (Sept 2011)

Table 3 Comparison Goods Expenditure and Expenditure Growth (minus SFT) (£m)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	All Zones Total
Total 2011	33.46	29.33	52.48	28.15	55.37	51.75	250.54
Total 2016	36.87	32.32	57.84	31.02	61.02	57.03	276.10
Total 2021	45.88	40.21	71.96	38.60	75.93	70.96	343.55
Total 2026	53.00	46.45	83.13	44.60	87.71	81.98	396.87
Total 2031	63.09	55.30	98.97	53.09	104.42	97.60	472.48

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	All Zones Total
Growth in total expenditure 2011 - 2016	3.41	2.99	5.35	2.87	5.65	5.28	25.56
Growth in total expenditure 2016 - 2021	9.01	7.89	14.13	7.58	14.91	13.93	67.45
Growth in total expenditure 2021 - 2026	7.12	6.24	11.17	5.99	11.78	11.01	53.32
Growth in total expenditure 2026 - 2031	10.10	8.85	15.84	8.50	16.71	15.62	75.61

Notes: Expenditure per zone is product of population (table 1) and comparison expenditure (table 2)
Special forms of trading have been deducted.

Table 4 Summary of capacity for comparison goods base (£m)

	2011	2016	2021	2026	2031
Total expenditure (minus SFT)	250.54	276.10	343.55	396.87	472.48
Total expenditure leaves catchment area (72%)	180.39	198.79	247.35	285.74	340.19
Total expenditure retained in catchment area (28%)	70.15	77.31	96.19	111.12	132.29
Total expenditure retained at Ely (23.9%)	59.88	65.99	82.11	94.85	112.92
Expenditure from outside of catchment area (5%)	2.99	3.30	4.11	4.74	5.65
Total turnover of Ely comparison floorspace	62.87	69.29	86.21	99.59	118.57
Total turnover of retained comparison floorspace outside Ely	10.27	11.32	14.09	16.27	19.37

Notes: Market shares for the district are taken from the ECDC Household and Shoppers Survey 2005

Table 5 Future comparison floorspace capacity at Ely

	2011-2016	2016-2021	2021-2026	2026-2031	Total projected floorspace (sqm net) to 2031
Study area total comparison expenditure change (£m)	6.41	16.93	13.38	18.98	
Sales density increase of all comparison outlets (£m)	4.79	6.09	7.58	8.76	
Net increase in comparison expenditure (£m)	1.62	10.83	5.80	10.22	
Capacity					
Sales per sq m net for new shops (£ per sqm)	4,000	4,500	4500	4500	
Supportable capacity for new shop floorspace (sqm net)	406	2407	1289	2270	6373

Table 5b Future comparison floorspace capacity outside of Ely

	2011-2016	2016-2021	2021-2026	2026-2031	Total projected floorspace (sqm net) to 2031
Study area total comparison expenditure change (£m)	1.05	2.77	2.19	3.10	
Sales density increase of all comparison outlets (£m)	0.78	1.01	0.97	1.44	
Net increase in comparison expenditure (£m)	0.27	1.76	1.22	1.66	
Capacity					
Sales per sq m net for new shops (£ per sqm)	4000	4500	4500	4500	
Supportable capacity for new shop floorspace (sqm net)	66	391	271	368	1097

Notes: Sales density growth rates are taken from Experian retail planner briefing note 9 (Sept 2011)

Appendix 9: Convenience Retail Capacity Modelling

Table 1 Population Projections

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	All zones total
Population 2011	10,061	10,777	17,591	6,911	18,331	17,729	81,400
Population 2016	10,419	11,161	18,217	7,157	18,984	18,361	84,300
Population 2021	11,235	12,035	19,643	7,717	20,471	19,798	90,900
Population 2026	11,248	12,048	19,665	7,726	20,493	19,820	91,000
Population 2031	11,631	12,459	20,335	7,989	21,191	20,495	94,100
Change in Population 2011 - 2016							
Numeric increase	358	384	627	246	653	632	2,900
Percentage increase	3.6	3.6	3.6	3.6	3.6	3.6	4%
Change in Population 2016 - 2021							
Numeric increase	816	874	1,426	560	1,486	1,437	6,600
Percentage increase	7.8	7.8	7.8	7.8	7.8	7.8	8%
Change in Population 2021 - 2026							
Numeric increase	12	13	22	8	23	22	100
Percentage increase	0.1	0.1	0.1	0.1	0.1	0.1	0%
Change in Population 2026 - 2031							
Numeric increase	383	410	670	263	698	675	3,100
Percentage increase	3.4	3.4	3.4	3.4	3.4	3.4	3%

Notes: Population projections for the study area from the Cambridgeshire County Council Research Group

based upon the updated ECDC housing trajectory 2011-2031.
Zonal Split for Partial Review held constant for each study year, zonal split based on proportional split for each zone at 2011 in Retail Study 2005. (12.36% in Zone 1, 13.24% in Zone 2, 21.61% in Zone 3 , 8.49% in Zone 4, 22.52% in Zone 5, 21.78% in Zone 6)

Table 2 Convenience Goods per Capita (£)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
Expenditure 2011	2246	1947	2073	2654	1620	2107
2011 minus SFT	2152	1865	1985	2543	1552	2018
Expenditure 2016	2271	1968	2095	2683	1638	2130
2016 minus SFT	2137	1852	1972	2525	1541	2004
Expenditure 2021	2333	2022	2152	2756	1682	2188
2021 minus SFT	2186	1894	2016	2582	1576	2050
Expenditure 2026	2402	2082	2216	2839	1732	2253
2026 minus SFT	2239	1941	2066	2646	1614	2100
Expenditure 2031	2475	2145	2283	2924	1784	2321
2031 minus SFT	2301	1995	2123	2719	1659	2158

Notes: Expenditure data from Experian comparison expenditure estimates provided in 2010 prices.
Comparison expenditure growth rate is taken from Experian retail planner briefing note 9 (Sept 2011)
Special Forms of Trading growth rate is taken from Experian retail planner briefing note 9 (Sept 2011)

Table 3 Convenience Goods Total Expenditure (minus SFT) (£m)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	All Zones Total
Total 2011	21.65	20.10	34.93	17.57	28.44	35.79	158.48
Total 2016	22.27	20.67	35.92	18.07	29.25	36.80	162.99
Total 2021	24.56	22.80	39.61	19.93	32.26	40.58	179.73
Total 2026	25.18	23.38	40.62	20.44	33.08	41.62	184.34
Total 2031	26.77	24.85	43.17	21.72	35.16	44.24	195.91

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	All Zones Total
Growth in Total Expenditure 2011-2016	0.62	0.57	0.99	0.50	0.81	1.02	4.51
Growth in Total Expenditure 2016-2021	2.29	2.12	3.69	1.86	3.00	3.78	16.74
Growth in Total Expenditure 2021-2026	0.63	0.58	1.02	0.51	0.83	1.04	4.61
Growth in Total Expenditure 2026-2031	1.58	1.47	2.55	1.28	2.08	2.61	11.58

Notes: Expenditure per zone is product of population (table 1) and comparison expenditure (table 2)
Special forms of trading have been deducted.

Table 4 Total Turnover of Ely Supermarkets (£)

	2011
Expenditure on supermarkets per capita per year	1654.92
Expenditure on Tesco per capita per year (41.20%)	681.83
Expenditure on Waitrose per capita year (13.20%)	218.45

Notes: Market shares for the supermarkets are taken from the ECDC Household and Shoppers Survey 2005

Table 5 Turnover of Ely Supermarkets Compared to Retail Rankings Company Average

	Tesco	Waitrose
Floorspace (sq m) gross	4482	1630

Floorspace (sq m) net	3048	1059
Expenditure at store / capita / annum (£)	681.83	218.45
Population of district 2011	81,400	81,400
Total turnover of store per annum (£m)	55.5	17.8
Turnover per sq m net (£)	18209	16791
Retail Rankings turnover per sq m net (£)	13400	12473
Overtrading of Ely Supermarkets (£m)	14.66	4.57
Convenience planning commitments (£m)	33.5	

Notes: Convenience planning commitments (Aldi & Sainsbury's developments in Ely) based upon the projected study area expenditure for Sainsbury's and the projected Aldi turnover taken from the Inspectors Decision to Lidl Inquiry.

Table 6 Future Convenience Goods Expenditure Capacity

	2011-2016	**2016-2021**	**2021-2026**	**2026-2031**	**Total projected floorspace (sqm net) to 2031**
Study area total convenience expenditure change (£m)	2.84	10.55	2.90	7.29	
Sales density increase of all convenience outlets (£m)	0.00	1.46	1.10	1.18	
Net increase in convenience expenditure (£m)	2.84	9.09	1.80	6.12	
Capacity					
High sales density (£ per sq m)	10000	10000	10000	10000	
Supportable capacity for new shop floorspace (sq m net)	284	909	180	612	1984
Low sales density (£ per sq m)	5000	5000	5000	5000	
Supportable capacity for new shop floorspace (sq m net)	568	1817	360	1224	3969

Notes: Sales density growth rates are taken from Experian retail planner briefing note 9 (Sept 2011)