
APPENDIX 2

CAMBRIDGE CITY CENTRE HEALTH CHECK

APPENDIX 2A

KEY INDICATORS

Cambridge City Centre: Key Indicators

Retail Composition by Number of Units¹

<i>Retail Category</i>	<i>No. of Units</i>	<i>Percentage of total (%)</i>	<i>National Average (%)</i>	<i>Variants (%)</i>
Convenience	46	6.41	8.62	-2.21
Comparison	311	43.31	35.62	7.70
Service	307	42.76	45.46	-2.70
Vacant	52	7.24	10.13	-2.89
Miscellaneous	2	0.28	0.17	0.11
Total	718	100	100	

Source: Experian Goad Town Centre Category Report (October 2007)

¹ Total combines Cambridge Central and Grafton Centre Experian Goad Town Centre Category Reports.

Vacancy Rate by Unit and Floorspace

<i>Vacant Units</i>	<i>Percentage of Total Units</i>	<i>National Average (%)</i>	<i>Vacant floorspace (sq.m)</i>	<i>% of Total Floorspace</i>	<i>National Average (%)</i>
52	7.24	10.13	9,755	6.58	7.96
<i>Source: Experian Goad Town Centre Category Report (October, 2007)</i>					

Ranking of Retailer Requirements

<i>Number of Requirements</i>	<i>Ranking (1st Highest)</i>	<i>Date</i>
182	3	Oct 07
176	6	Oct 06
203	4	Oct 05
184	5	Oct 05
192	3	Oct 03
206	2	Oct 02
<i>Source: Focus Property Intelligence Database (March, 2008)</i>		

Comparison of Prime Retail Rents (£ per sqm)

Centre	2002	2003	2004	2005	2006	2007
London, West End ²	5059	5167	5221	5382	5651	5705
Brent Cross	4467	4467	4467	4575	4575	4736
Bluewater, Kent	3552	3875	4306	4413	4413	4467
Lakeside, Thurrock	3229	337	3552	3767	3875	3875
Milton Keynes	2583	2583	2691	2852	2960	2960
Cambridge	2583	2583	2583	2583	2583	2637
Norwich	2153	2153	2153	2260	2260	2260
Peterborough	2207	2207	2260	2260	2260	2260
Chelmsford	1615	1615	1772	1776	1830	1938
Colchester	1615	1615	1615	1668	1830	1830
Bury St Edmunds	1130	1130	1130	1130	1130	1238
Stevenage	1130	1130	1184	1184	1184	1238
Bedford	1023	1023	1076	1076	1076	1130
Kings Lynn	915	915	915	915	915	915
Letchworth	377	377	377	484	484	538
Sudbury	592	592	646	646	700	700

Source: Colliers CRE - June 2007

² Oxford Street West

Comparison of Prime Retail Yields (% Change)

<i>Centre</i>	<i>Apr-02</i>	<i>Apr-03</i>	<i>Jul -04</i>	<i>Jul-05</i>	<i>Jul-06</i>	<i>Jul-07</i>
Brent Cross	5	5	5	4.5	4.25	4.25
London, West End ³	5.25	5.25	5.25	5	5	4.5
Milton Keynes	4.75	4.75	4.75	4.75	4.75	4.5
Chelmsford	5.5	5.5	5.5	5.25	4.75	4.75
Colchester	6	6	6	5.35	4.75	4.75
Blue Water, Kent	6	6	5	5	5	5
Bury St Edmunds	5.25	5	5.25	5	5.25	5
Cambridge	5.25	5.5	5.5	5.25	5.25	5
Lakeside, Thurrock	5.5	5.5	5.47	4.75	4.75	5
Peterborough	5	5	5	5	5	5
Norwich	5	5.5	5.5	5.5	5.5	5.5
Sudbury	7.75	6.75	7	6.75	6	5.75
Bedford	6	6	6	6	6	6
Stevenage	7	7	7	6.5	6.5	6.5
Kings Lynn	7	7	7	7	7	7
Letchworth	8.5	8.5	8.5	8.5	8.5	8.5

Source: Valuation Office Agency - Property Market Report July 2007

³ Oxford Street West

APPENDIX 2B

RETAILER REQUIREMENTS

Retail Requirements: Cambridge

	Name	Type	Retail Category	Min Req (sqm)	Max Req (sqm)
1	Boden	Clothing & Accessories	Comparison	186	372
2	Ollie & Nic	Clothing & Accessories	Comparison	60	70
3	FIRST DRAGON LTD	Clothing & Accessories	Comparison	46	139
4	Bose Ltd	Electricals	Comparison	139	186
5	T-Mobile (UK) Retail Limited	Mobile Phones	Comparison	74	93
6	Everest	Homewares	Comparison	279	557
7	Leia	Lingerie	Comparison	121	186
8	Bershka	Clothing & Accessories	Comparison	300	100
9	The Garage Street Shoes	Footwear	Comparison	42	74
10	All Saints	Clothing & Accessories	Comparison	232	325
11	Poundland	Variety/Discount Stores	Comparison	325	650
12	Republic	Clothing & Accessories	Comparison	279	465
13	Intimissimi	Lingerie	Comparison	74	139
14	Mark Wilkinson Furniture Ltd	Home Furnishings	Comparison	74	279
15	Ulla Popken	Clothing & Accessories	Comparison	93	186
16	T K Maxx	Variety/Discount Stores	Comparison	1,394	3,716
17	Authentic Fossil	Clothing & Accessories	Comparison	56	111
18	The Tile Clearing House	DIY & Home Improvement	Comparison	511	929
19	Linens Direct UK Ltd	Textiles & Soft Furnishings	Comparison	186	372
20	Cath Kidston	Homewares, Clothing & Accessories	Comparison	70	139
21	Sunglass Hut	Accessories	Comparison	46	84
22	Tommy Hilfiger	Clothing & Accessories	Comparison	139	279
23	99p Stores Ltd	Variety/Discount Stores	Comparison	279	557
24	Culpeper	Toiletries, Cosmetics & Beauty Products	Comparison	28	93
25	Muse	Crafts & Gifts	Comparison	51	79
26	Greenwoods (Menswear) Ltd	Clothing & Accessories	Comparison	74	111
27	Feather & Black	Home Furnishings	Comparison	232	372
28	Penhaligons	Toiletries, Cosmetics & Beauty Products	Comparison	28	46
29	PRINCESS tam.tam	Lingerie	Comparison	55	60
30	Peacocks	Clothing & Accessories	Comparison	418	511
31	Roxy	Clothing & Accessories	Comparison	93	139
32	Quiksilver	Clothing & Accessories	Comparison	186	232
33	Comptoir des Cotonniers	Clothing & Accessories	Comparison	50	100
34	Hawes & Curtis	Clothing & Accessories	Comparison	93	186
35	Kathmandu UK Ltd	Outdoor clothing & equipment	Comparison	163	325
36	Laura Ashley Limited	Clothing & Accessories	Comparison	279	465
37	Harvey Jones Kitchens	Household goods	Comparison	56	88
38	Hemisphere	Clothing & Accessories	Comparison	65	186
39	Shoe Zone Ltd	Footwear	Comparison	93	232
40	JoJo Maman Bebe	Clothing & Accessories	Comparison	74	102
41	Oliver Bonas	Clothing & Accessories	Comparison	23	93
42	YMCA Shops	Charity Shops	Comparison	74	279
43	Esprit	Clothing & Accessories	Comparison	599	900
44	Sweaty Betty	Clothing & Accessories	Comparison	70	130
45	Maya	Clothing & Accessories	Comparison	37	74
46	A Gift From The Gods	Clothing & Accessories	Comparison	56	93
47	Mandarin Stone	DIY & Home Improvement	Comparison	139	279
48	Bershka (agent)	Clothing & Accessories	Comparison	409	511
49	Castle Galleries (agent)	Art & Art Dealers	Comparison	46	139
50	Card Factory	Greeting Cards	Comparison	93	130
51	Elvi	Clothing & Accessories	Comparison	93	232
52	Charles Clinkard	Clothing & Accessories	Comparison	93	302
53	Beaverbrooks The Jewellers,	Jewellers	Comparison	93	121
54	Faith Footwear Ltd	Footwear	Comparison	93	130
55	Formula One Auto Centre	Vehicle Accessories	Comparison	232	929
56	Blue Inc	Clothing & Accessories	Comparison	139	232
57	Travelling Light	Clothing & Accessories	Comparison	56	139
58	Scope	Charity Shop	Comparison	70	465
59	Octopus Fashion Accessories	Clothing & Accessories	Comparison	37	56
60	Puma	Clothing & Accessories	Comparison	325	511
61	Scribbler	Greeting Cards	Comparison	0	0
62	Steamer Trading Ltd	Household goods	Comparison	84	372
63	Levi Strauss	Clothing & Accessories	Comparison	149	186

<i>Name</i>	<i>Type</i>	<i>Retail Category</i>	<i>Min Req (sqm)</i>	<i>Max Req (sqm)</i>	
64	The Fabric Warehouse	Textiles & Soft Furnishings	Comparison	465	929
65	Profile Clothing Ltd	Clothing & Accessories	Comparison	93	557
66	Wesselton	Jewellers	Comparison	93	102
67	The Pier	Household goods	Comparison	186	650
68	Confetti	Crafts & Gifts	Comparison	186	279
69	Quiz Clothing,	Clothing & Accessories	Comparison	139	232
70	Bonita	Clothing & Accessories	Comparison	93	186
71	Cex Ltd	Electricals	Comparison	186	557
72	HPJ Retailing	Jewellers	Comparison	65	111
73	British Heart Foundation	Charity Shops	Comparison	60	557
74	Punky Fish	Clothing & Accessories	Comparison	79	93
75	B & Q Plc	DIY & Home Improvement	Comparison	4,645	9,290
76	Yours	Clothing & Accessories	Comparison	139	186
77	Hammonds Furniture Ltd	Home Furnishings	Comparison	93	465
78	Klaussner	Home Furnishings	Comparison	465	929
79	United Carpets and Beds	Home Furnishings	Comparison	557	929
80	Divertimenti	Homewares	Comparison	163	279
81	Help The Aged	Charity Shops	Comparison	74	93
82	Superdrug Stores Plc	Chemists & Drugstores	Comparison	186	557
83	T J Hughes Ltd	Variety/Discount Stores	Comparison	2,323	13,935
84	ScS Upholstery plc	Home Furnishings	Comparison	650	929
85	Gerry Weber	Clothing & Accessories	Comparison	232	372
86	Ghost	Clothing & Accessories	Comparison	93	139
87	Desire by Debenhams	Clothing & Accessories	Comparison	1,858	2,323
88	Tula Group	Leather & Travel Goods	Comparison	65	139
89	The Body Shop	Toiletries, Cosmetics & Beauty Products	Comparison	74	186
90	Billabong	Clothing & Accessories	Comparison	130	465
91	Trespass	Outdoor clothing & equipment	Comparison	93	139
92	OKA Direct Ltd	Homewares	Comparison	232	372
93	Orvis Company Inc	Outdoor clothing & equipment	Comparison	74	139
SUB TOTAL COMPARISON				23,844	55,758

<i>Name</i>	<i>Type</i>	<i>Retail Category</i>	<i>Min Req (sqm)</i>	<i>Max Req (sqm)</i>	
1	Planet Organic	Organic Foodstore	Convenience	372	929
2	Nuggs	Culinary Gift Shop	Convenience	93	149
3	Olio & Farina	Italian Foodstore	Convenience	40	70
4	The Bakers Oven	Bakers	Convenience	163	279
SUB TOTAL CONVENIENCE				667	1,426

<i>Name</i>	<i>Type</i>	<i>Retail Category</i>	<i>Min Req (sqm)</i>	<i>Max Req (sqm)</i>	
1	Rocket Restaurants	Restaurant	Service	93	372
2	First Choice	Travel Agents	Service	46	139
3	Rush London	Hairdresser	Service	93	186
4	Starbucks Coffee Company	Coffee Shop	Service	65	167
5	Greens Health & Fitness	Health & Fitness	Service	2,323	2,787
6	Johnsons Cleaners UK Ltd	Dry Cleaners	Service	93	116
7	The Livery	Restaurant	Service	511	604
8	The Elbow Room	Sports & Leisure Facilities	Service	372	929
9	Leon	Restaurant	Service	111	372
10	McDonalds Restaurants Limited	Restaurant	Service	186	204
11	Nomad Travel	Travel Agents	Service	121	186
12	Cafe Rouge	Restaurant	Service	232	325
13	Bradford & Bingley Building Society	Building Society	Service	111	139
14	Esporta Plc	Health & Fitness	Service	1,115	2,230
15	Pret a Manger (UK) Limited	Restaurant	Service	79	279
16	Barefruit Juice	Cafés	Service	14	51
17	Hooters	Bars & Wine Bars	Service	372	743
18	Toast	Cafés	Service	93	186
19	Toby Carvery	Restaurant	Service	604	697
20	Vintage Inns	Bars & Wine Bars	Service	650	743
Name	Type	Retail Category	Min Req (sqm)	Max Req (sqm)	

	<i>Name</i>	<i>Type</i>	<i>Retail Category</i>	<i>Min Req (sqm)</i>	<i>Max Req (sqm)</i>
21	Individual Restaurant Company	Restaurant	Service	279	743
22	Bluu Bar	Bars & Wine Bars	Service	465	1,115
23	Subway	Fast Food/Takeaway Outlets	Service	37	139
24	Coffee Republic	Coffee Shop	Service	84	167
25	Barracuda Group Limited	Bars & Wine Bars	Service	465	836
26	Marstons Plc	Bars & Wine Bars	Service	2,023	2,183
27	Gourmet Burger Kitchen	Fast Food/Takeaway Outlets	Service	149	260
28	La Tasca	Restaurant	Service	232	325
29	Novus leisure Ltd	Health & Fitness	Service	557	929
30	West Cornwall Pasty Co Ltd	Fast Food/Takeaway Outlets	Service	28	93
31	Regis Hairdressers	Hairdresser	Service	93	111
32	Costa Coffee	Coffee Shop	Service	93	93
33	Fruitsticks	Cafés	Service	9	46
34	Yo Sushi	Restaurant	Service	139	232
35	The Sports Cafe	Bars & Wine Bars	Service	465	1,394
36	David Lloyd Leisure Plc	Health & Fitness	Service	279	372
37	Jongleurs	Clubs	Service	557	929
38	Walkabout	Bars & Wine Bars	Service	650	929
39	Old Orleans	Restaurant	Service	372	650
40	Travelodge	Hotel	Service	929	1,858
41	The Change Group	Financial Services	Service	23	139
42	Natural Cafe	Cafés	Service	93	139
43	Saks	Hairdresser	Service	65	93
44	Liquid	Clubs	Service	1,394	1,858
45	Subway	Fast Food/Takeaway Outlets	Service	37	139
SUB TOTAL SERVICE				16,799	27,229

	<i>Name</i>	<i>Type</i>	<i>Retail Category</i>	<i>Min Req (sqm)</i>	<i>Max Req (sqm)</i>
1	Vets4Pets Ltd	Veterinary Practice	Other	186	223
2	Lok'nStore	Self Storage	Other	1,394	4,645
3	Access Self Storage	Self Storage	Other	1,858	4,645
4	Big Yellow Self Storage Ltd	Self Storage	Other	1,394	1,858
5	Safestore Ltd	Self Storage	Other	1,394	4,645
SUB TOTAL SERVICE				6,224	16,016

TOTAL				47,534	100,429
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Focus, April 2006