**GVA** Humberts Leisure

# Final Report

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# Cambridge Public House Study

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**For and on behalf of GVA Humberts Leisure**

# Contents

# 1. Introduction

## Background

1.1 There are 86 public houses still trading or under refurbishment in Cambridge. In recent years more than 20 pubs in Cambridge have been lost to alternative uses, most for residential development, some converting fully to restaurants, and some simply closing.

1.2 Nationally, the pub industry is facing difficult times with a deep recession, rising unemployment, pay cuts and restraint and reduction in real wages and salaries all leading to a reduction in disposable incomes. At the same time beer prices have increased due to increases in the cost of raw materials, transport costs, an increase in VAT and the excise tax duty escalator. This has compounded earlier difficulties made by the smoking ban, supermarket discounting of alcohol, and changing drinking habits.

1.3 According to the British Beer and Pub Association Britain was losing 45 pubs a week during 2009, and 25 a week in 2010. Pubs sold 140 million fewer pints last year as beer sales feel by 3.4% to the lowest since 2004. Clearly, even prosperous areas such as Cambridge have been affected by these adverse market conditions.

1.4 As an attractive and prosperous city, surrounded by a tight Green Belt, there is strong demand for housing sites in Cambridge. Therefore, at the same time as the city's pubs are faced by declining demand, there appears to be strong pressure to convert pub sites into housing. However, despite these pressures, some entreprenuers have been able to successfully reopen pubs, with the Milton Brewery successfully reopening the Devonshire Arms.

1.5 Despite the rate of closures, brewing and pubs are still key contributors the national economy with a Gross Value Added of £19.4 billion, generating tax revenue of more than £11 billion. Furthermore, whilst the level of employment is falling, the sector still supports some 950,000 jobs, highlighting the value of the pubs sector nationally, and its importance to the economy locally.

1.6 Public houses are not only important as a vital resource and social meeting place for communities they are also a vital part of the economic package of towns and cities, providing a key attraction for overseas and domestic tourists, an attraction for students in selecting their place of study, a meeting place to discuss businesses, a place for weary shoppers to rest, and providing a source of late night customers for local take-aways, restaurants and nightclubs. They are therefore an integral part of the local economy.

1.7 This is particularly the case in Cambridge whose economy relies on its ability to attract the brightest students, academics and entrepreneurs, in providing a place for these people to interact and exchange ideas, as well as upon being a popular destination for tourists.

1.8 Clearly, pubs can play an important role in supporting the local economy and community in Cambridge. The council therefore needs advice on determining the future viability of pubs and on planning policy to protect them from higher value residential development when the pub itself may still have a viable future in pub use.

1.9 Planning policy can only go so far. For example, planning permission is not required to convert a pub from its A4 use class to an A3 restaurant, A2 professional services office or A1 shop. In some ways it is important to retain the A4 to A3 flexibility as many pubs have only managed to survive the fall in demand for drink by diversifying into gastro-pubs selling a much improved range of food more in keeping with the middle-class surroundings of gentrified areas in which they may find themselves. Nevertheless, there are a number of other tools that can be investigated to help safeguard pubs.

## GVA Humberts Leisure

1.10 GVA Humberts Leisure[1] has therefore been commissioned to undertake an audit of public houses in Cambridge, to advise the council on the national and local market, and to prepare interim planning policy guidance. This report provides an overview of our audit and appraisal of the Cambridge pub market together with a review of planning policy as background evidence for the interim planing policy guidance.

1.11 GVA Humberts Leisure is the specialist sport, leisure and tourism advisory arm of GVA, one of the UK's top property consultancies. With twelve offices covering the whole of the UK, GVA Humberts Leisure has the capability to provide the full range of property advisory services to the leisure business across the regions.

1.12 Our Leisure Planning Consulting team is a leading advisor to leisure industry. Our specialist team advises many clients from the public sector on leisure planning policy. Our Licensed Leisure team is also a leading advisor to the public house industry

[1] Please note the GVA Humberts Leisure was re-branded in June 2012 and became GVA's Hotels and Leisure team. However, since the report was written prior to this change, the references to GVA Humberts Leisure remain.

conducting regular property and business valuations for national, regional and local operators.

## Methodology

1.13 To complete this study we have undertaken the following work:-

- A review of market trends in the pub industry, including a comparison of Cambridge with a number of other historic university towns and cities;
- An audit of existing pub provision in Cambridge, including a visit to each pub by our surveyors to assess the characteristics of each pub and the type of market it is addressing;
- An assessment of the local pub market from the synthesis of this work;
- A review of national and local planning policy and decisions in relation to proposals for the change of use or redevelopment of pubs;
- Draft and finalise interim and long term planning policy guidance.

1.14 This report sets out our findings and recommendations which were originally considered through public consultation. The report was amended following feedback from those consultations forms part of the background to the Interim Planning Policy Guidance (IPPG).

# 2. National Market Trends

## Introduction

2.1 In this chapter we provide a brief overview of the public house sector in the UK, covering recent national market trends and key factors impacting the industry. This will inform our subsequent analysis of the local market.

## Market Size

2.2 Whilst the decline of the pub sector has been a long and gradual trend (with the number of pubs per head of the population falling considerably over the last century), this significant decline in pub supply appears to have accelerated over the last five to ten years or so.

2.3 The British Beer and Pubs Association (BBPA) estimate that there were 55,000 pubs in Britain in 2010 compared to around 59,000 in 2004. In 2009 alone, more than 2,350 pubs closed, equating to a record high of 52 closures a week in the first half of the year (and 45 per week over the full year).

2.4 Although the number of closures fell slightly in 2010 (1,300 in total), potentially indicating some easing of pressure on the market, the overall downward trend has continued with pubs still closing at an average rate of 16 per week in the second half of 2011. It is now estimated[2] that there are 52,000 pubs and bars across the UK.

## Key Recent Market Trends

2.5 As outlined above, the UK pub sector has been declining over the last few decades, with a significant fall seen in the last five years or so.

2.6 Whilst much of the recent decline can be attributed to the current recession placing significant strain on consumer's disposable income, there have been a number of other factors over recent years which have combined to create increasingly difficult trading conditions, thus forcing a growing number of licensees out of the market. We discuss the key issues below.

[2] BBPA February 2012

## 1989 Beer Orders and the Rise of the Pubco

2.7 Due to the market dominance by a small number of breweries with large owned pub estates (such as Bass Charmington, Allied and Whitbread) by the late 1980s, the 1989 Beer Orders were passed through Parliament in order to try and encourage competition and consumer choice within the industry by limiting the level of permitted pub ownership by breweries.

2.8 However, the legislation seemingly had relatively little effect on the overall structure of the industry, with the main brewers responding by divesting their owned estates to standalone pub companies (pubco's) – meaning the dominance and structure remained largely unchanged.

Figure 2.1: Ownership of UK Pubs over Time by Type of Operator

| Ownership Type | 1989 | 2004 | 2009 |
|---|---|---|---|
| **National Brewers** | | | |
| Tenants / Leased | 22,000 | 0 | 0 |
| Managed | 10,000 | 0 | 0 |
| ***Sub-total*** | ***32,000*** | ***0*** | ***0*** |
| **Regional Brewers** | | | |
| Tenants / Leased | 9,000 | 5,972 | 6,500 |
| Managed | 3,000 | 2,617 | 2,400 |
| ***Sub-total*** | ***12,000*** | ***8,589*** | ***8,900*** |
| **Independent Pub Companies** | | | |
| Tenants / Leased | Negligible | 23,857 | 22,300 |
| Managed | Negligible | 10,268 | 6,100 |
| Freehouses | 16,000 | 16,850 | 18,230 |
| ***Sub-total*** | ***16,000*** | ***50,975*** | ***46,630*** |
| **Total** | **60,000** | **59,564** | **55,530** |

*Source: Institute for Public Policy Research (IPPR)*

2.9 The Beer Orders essentially, therefore, saw the creation of standalone pub companies. These have continued to rise over the last few decades, with tenanted and managed pubco's owing over half of all pubs across the UK by 2009. Within this, it is estimated that the six largest pubco's (Punch Taverns, Enterprise Inns, Admiral Taverns, Mitchells & Butlers, Scottish & Newcastle Pub Company and Spirit Group) accounted for around one third of supply.

2.10 Furthermore, in 2011, the large pubco's still accounted for more than 20,600 pubs - thus highlighting the continued dominance of a few major players within the market, who continue to seek and develop opportunities in the right locations, despite wider economic and market conditions resulting in a significant number of pub closures over the last few years.

## Smoking Ban

2.11 The Smoking Ban came into force in England in July 2007. Since then, it has had an impact on the pub industry by changing pub culture and arguably reducing the appeal of pubs for many of the adult pub-going population who smoke.

2.12 In particular, Mintel[3] estimate that C2DE[4] pub-goers aged 25 to 54 years have been amongst the most affected by the ban. Young to middle-age consumers, and those within the C2 socio-economic group, are typically amongst the most frequent pub goers, which highlights the potential impact of the ban on pub trade.

2.13 That aside, the ban has mostly been well received by the general public and licensees. Research by The Publican found that a quarter of pubs have attracted new customers as a result of the ban, and overall some 73% of licensees supported the ban staying in place.[5]

2.14 One of the biggest impacts arising from the ban has been for licensees to develop covered outside smoking areas. The impact of the smoking ban has been greatest for those pubs that are 'landlocked' without access to outdoor space for development, as consumers are more reluctant to stand outside in uncovered area to smoke (especially in the winter months), which has significantly impacted upon trade at these pubs.

## Rising VAT and the Beer Duty Escalator

2.15 The higher and increasing level of taxation on beer continues to have a major impact on the profitability of pub businesses across the UK. Since 2004, it is estimated that beer duty has risen by 52% whilst beer sales in pubs have fallen by around 25%. In 2011alone, in addition to the 2.5% increase in VAT, beer duty rose by 7.2% (a minimum 2% above inflation rise), whilst at the same time, pub beer sales reportedly fell by a further 3.4%.

2.16 Although pubs are permitted to pass these costs onto consumers, it is becomingly increasingly difficult to inflate prices sufficiently to fully cover taxation costs, in view of

[3] Mintel Impact of the Recession on Consumers Leisure Habits May 2010
[4] Based on the standard socio-economic classifications of AB, C1, C2, D and E - whereby AB is the most affluent and E is the least.
[5] Institute for Public Policy Research January 2012 (referenced Sky News Online 2007)

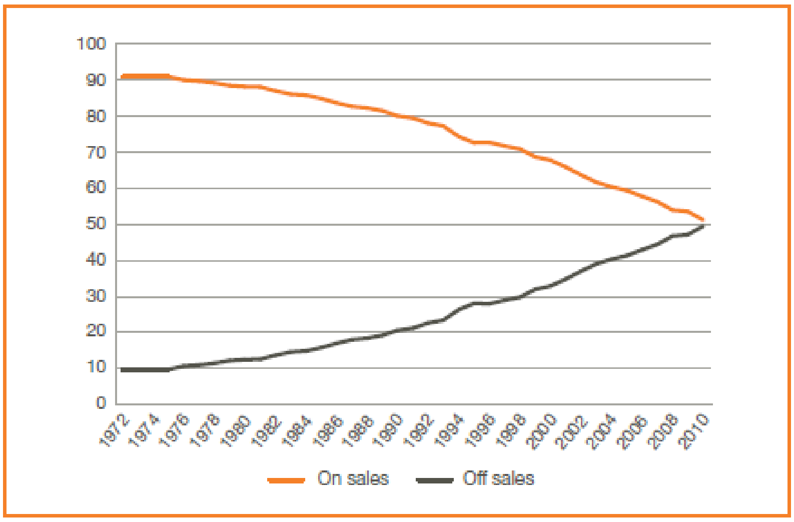
the reduced disposable income and spend on leisure activities amongst consumers and key target age and socio-economic groups due to the recession.

2.17 The further increase in alcohol tax announced in the March 2012 Budget is expected to put further and continued pressure on the sector as prices rise and consumer disposable income remains tight due to the economic climate.

## Sales Growth in Off-licensed Premises

2.18 The growth in alcohol sales from off-licensed premises, particularly supermarkets, is another key factor in the decline of the British pub. The BBPA now estimates that supermarkets account for 70% of all alcohol sales, with only 30% bought in on-licensed premises.

Figure 2.2: UK Beer Sales via the 'On' and 'Off' Trades (% of total UK beer sales)




*Source: IPPR*

2.19 Much of this is due to the ability of supermarkets to absorb taxation costs and sell alcohol at a lower retail price (due to economies of scale), which has widened the gap between off-trade and on-trade consumption. Since 1987, the BBPA state that there has been a 187% increase in the price of beer in pubs compared to just a 52% increase in the price of beer sold through supermarkets and other off-licences. Not surprisingly, the BBPA are calling for the government follow many European governments in cutting VAT in food and beverage sold in pubs from 20% to 5% on the basis that they are in unfair competition with supermarket.

2.20 As a result, there has been a notable shift towards a culture of socialising and drinking / staying at home, both due to price and a growth in home entertainment such as games consoles, television and DVDs, which has, in turn, contributed to falling alcohol (particularly beer) sales in pubs. There has also been a rising culture of 'pre-loading' especially among young adults where groups meet up at each other houses before hand and drink cheap supermarket alcohol before venturing out later to pubs and clubs.

## Rising Costs

2.21 Interestingly, since their rise, pubco's have become the subject of much controversy within the industry over claims of higher wholesale prices for their tenanted / tied pubs. This, combined with other rising costs (such as utility and material costs, as well as spend on entertainment to try and attract market share) and reduced consumer demand, is creating an increasingly difficult trading environment and is reportedly a key contributing factor in driving a growing number of tenants out of the market.

## Rise of Microbreweries

2.22 One of the more positive trends within the industry has been the considerable rise in the number of microbreweries across the UK in recent decades. At the start of the 20th Century, it is estimated that there were more than 1,300 breweries spread across the country[6]. However, by 1970 this had fallen to just 141 located in a small number of key towns and cities, as the large brewing companies benefited from technological advances and economies of scale, thereby forcing smaller, less competitive breweries out of the industry.

2.23 This situation prompted the formation of the Campaign for Real Ale (CAMRA) in 1971, with the aim of improving consumer choice through promoting competition and diversity within the industry. This subsequently led to growing demand for quality and regional diversity which, in turn, saw a rise in the number of small regional breweries targeting more discerning customers who are willing to pay slightly more for quality, local brews.

2.24 It is estimated that by 2004 the number of breweries had risen to around 480 – fuelled largely by the growth in small-scale microbreweries in response to the changing consumer demand. At the same time, there has been a notable fall in the number of larger breweries (with an estimated 40 leaving the market since 2007), as small-scale production is not economically viable for these companies. Despite this, however, the leading regional breweries continue to profit with many acquiring smaller companies and their brands.

[6] UK Trade and Investment 21 June 2011

2.25 In more recent years, the tax breaks introduced by the previous Labour Government have acted as a further incentive for small-scale production. This combined with the growing popularity of regional brews, has further stimulated the trend which continues to go from strength to strength with a record number of microbreweries across the UK. It is estimated that there are now around 900 breweries in the UK, forming a key sector of Britain's brewing industry.

## Impact of the Recession

2.26 The recession has impacted negatively on consumer spending; with a particular focus on a reduction in discretionary leisure expenditure (i.e. spending that is not deemed as essential). This has included reduced expenditure at food and beverage outlets. The recession has reversed a trend since the mid-1990s of year on year increases in alcohol consumption per head.

2.27 Although eating out and going out for a drink remain popular leisure activities (largely due to their relative everyday affordability and the social aspect involved), both frequency of visit and average expenditure at pubs/bars have fallen significantly in recent years, and there has been an increased reliance on price discounting / promotional offers within the eating out market to try and stimulate demand.

2.28 To emphasise this, between 2007 and 2009, Mintel[7] estimate that spend within the pub sector fell by some 7.7%, with 43% of consumers reportedly having cut back on expenditure at pubs/bars – albeit the same research indicates that, on the whole, a relatively small proportion (9%) of consumers plan to cut back further on this activity, suggesting that the market could be close to its lowest point.

2.29 This is further supported by research[8] indicating that the frequency of pub visits has risen in more recent months, with an estimated 7% rise over the last 6 months of 2011, up from 4.3 visits per month to an average of 4.6 visits across the UK. This has, however, been offset by a fall in average spend.

## Increase in Food-led Sales

2.30 Due to the challenging trading conditions facing the industry and falling 'wet revenues', pubs are increasing relying on food sales to try and drive business and improve profitability. For example, Mintel[9] estimate that food sales have grown from

[7] Mintel Impact of the Recession on Consumers' Leisure Habits May 2010
[8] Zolfo Cooper Leisure Wallet Report Winter 2011/2012
[9] Mintel Impact of the Recession on Consumers' Leisure Habits May 2010

24% of total pub revenue in 2004 to around 31% in 2009. This is a tactical shift for many operators / licensees as, despite reduced consumer spend and a heavy reliance on price discounting, overall the eating out market (especially casual dining such as pub-restaurants) has remained one of the most resilient sectors compared to other leisure activities, and indeed compared to the British pubs market.

2.31 An analysis of pub sales in figure 2.3 shows that major regional brewers Greene King, Marstons, Mitchells & Butler and Fuller Smith & Turner have all achieved like for like sales growth during the recession, however, during this time each brewer has increased food sales as a proportion of total sales, suggesting the main cause of this growth has been from increased food sales.

Figure 2.3: Regional Brewer Sales Growth

| Brewer | 2009 | 2010 | 2011 |
|---|---|---|---|
| | Like for Like Sales Growth | | |
| Green King | +1.7% | +3.5% | +4.9% |
| Marstons | -0.6% | +1.7% | +2.9% |
| Mitchell & Bulter | +1.6% | +2.8% | +2.6% |
| Fuller Smith & Turner | +3.0% | +2.7% | +3.9% |
| | **% Food of total sales** | | |
| Green King | **35%** | **37%** | **40%** |
| Marstons | **38%** | **40%** | **42%** |
| Mitchell & Bulter | **41%** | **47%** | **48%** |
| Fuller Smith & Turner | **27%** | **28%** | **29%** |
| *Source: Fleurets 'On Market' Issue 12/01 from company Annual Reports* | | | |

2.32 This trend is further evidenced by the growing number of 'gastro' pubs that have emerged across the UK in recent years, and can also be seen at a local level with a significant proportion of pubs in Cambridge moving more towards the restaurant business model and away from a traditional drinking establishment.

2.33 It is important to note, however, that the higher rate of VAT in the UK in recent months is likely to have an impact on food sales and the competitive position of pubs in the future, as prices continue to rise.

## Changes to Communities

2.34 Another key trend contributing to the overall decline of the British pub has been the change to local communities over time. Whereby, historically, the pub was typically at the heart of the local community, changing consumer lifestyles have meant that many pubs no longer form the same focal point for local communities – largely due to a much more transient population, with residents often having much more widely dispersed social networks.

2.35 In rural areas many villages have changed from local employment centres to second home locations with a considerably reduced local community / population base. In some cases, this has meant that the year-round population being served by a pub in a rural area has been decimated, with some second home owners only using their property(ies) on an irregular basis. In towns, pubs typically catering to local industrial workers have also suffered from the decline of these industries over time.

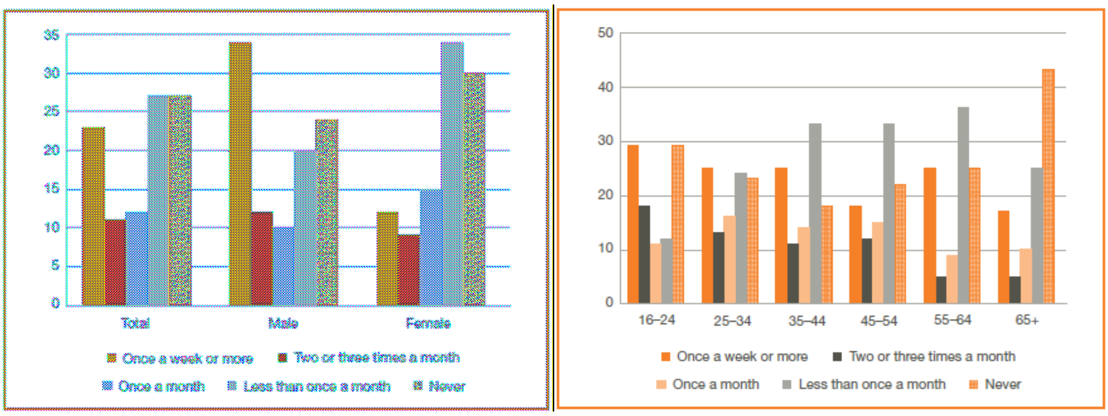
2.36 Long term changes in British tastes and liflestyles have also led to beer declining from 64% of alcohol sales in 1975 to just 37% by 2010. At the same time wine sales have increased from just 12% of alcohol consumption to 32%. This may also be linked to the emergence of a more equal society in which it is now just as acceptable for women to ‘go out for a drink’ as men. Pubs which have failed to adapt to this market by making their venues as welcoming to women as men, have suffered.

2.37 Arguably, these factors have often changed the nature of local communities which has, in turn, impacted on the role of the traditional community pub. In some areas, pub landlords have identified an opportunity to combine their offer with other local services that are under threat (for example, the village store and post office) to ensure their survival.

2.38 The ‘Pub is the Hub’ is a 'not for profit' advisory organisation which encourages local authorities, local communities, licensees, pub owners and breweries to work together to support, retain and locate services within rural pubs and has advised over 30 communities who have considered taking over their pub to ensure it stays as a community focal point. The organisation has managed to persuade some breweries and pub groups including, Punch Taverns and Enterprise Inns to let pubs to communities on a short term basis so that they can try it first

## Typical User Profile

Figure 2.4: Pub Attendance by Gender and Age



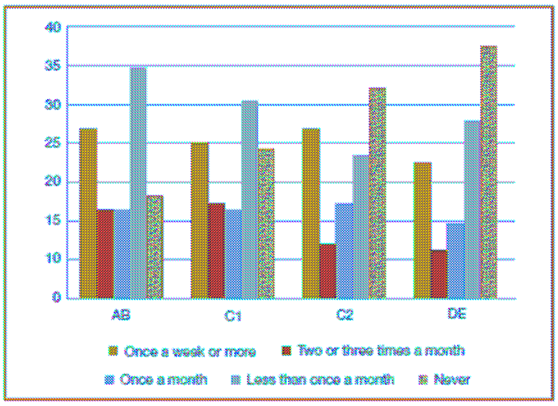

Source: IPPR

2.39 On average, it is estimated that just over 20% of the adult population visit a pub at least once a week. In terms of gender differentials, pubs are most frequently visited by adult males, with over one third visiting once a week or more. This compares to a similar proportion of women visiting less than once a month, if at all.

2.40 As shown, pubs are most popular amongst youths and young/middle-aged adults, with almost 30% of 16 to 24 years olds and around 25% of those aged 25 to 34 years visiting once a week or more.

2.41 Interestingly, however, a similar proportion of adults within these age categories never visit pubs. This could partly be attributed to rising national youth unemployment[10] and the young ethnic minority population base[11], which may have some implications for the industry in terms of the propensity for these adults to regularly visit pubs due to falling disposable income and religious beliefs.

Figure 2.5: Pub Attendance by Social Grade




*Source: IPPR*

2.42 Although pubs hold an appeal across all social grades[12], the most frequent users are more affluent AB and aspiring C2 individuals. It is estimated that more than a quarter of adults within these socio-economic classes visit the pub at least once a week.

2.43 However, the popularity amongst C2 residents is concerning as these individuals are likely to be amongst the most affected by the current recession, with research by Mintel showing that C2DEs are the most likely to have cut back on all leisure activities,

[10] Financial Times 6 February 2012
[11] University of Warwick, Profile of Black and Minority Ethnic Groups in the UK

particularly drinking out of the home.[13] Furthermore, as previously discussed, the same research estimates that C2DE pub-goers aged 25 to 54 are some of the most affected by the smoking ban, which combined with the impact of the recession, is likely to further shift pub culture towards food-led sales, particularly within the more affluent ABC1 eating out market.

## National Market Summary

2.44 The BBPA estimate that the number of pubs in Britain has declined by 7,000 in the eight years since 2004, from 59,000 to 52,000, a fall of 12%.

2.45 Whilst, individually, the recession has arguably had one of the greatest impacts on the sector in recent years, collectively, the smoking ban, rise in VAT and Beer Duty, competition from super-markets and changing lifestyles have all combined to create an increasingly competitive and difficult trading environment over time. The recession has, therefore, intensified and to a certain extent, accelerated a downward trend that was already apparent within the sector, and which for many operators and licensees has been the final contributor to the eventual closure of their business.

2.46 Moreover, although pubs have a relatively broad appeal across most age and social grades, the frequency and propensity to visit declines with age. This profile in itself, means that with an aging population nationally, combined with rising youth / young adult unemployment and falling disposable income, is cause for concern within the industry and is likely to further impact upon sales in on-trade establishments.

2.47 The industry has been adapting to these pressures through some restructuring with the rise of micro-breweries, increase in food sales, and ultimately, pub closures.

[12] Standard socio-economic classifications where AB consumers are considered the most affluent, falling to the E socio-economic group representing the least affluent.
[13] Mintel Impact of the Recession on Consumers' Leisure Habits May 2010

# 3. BENCHMARKING ANALYSIS

## Introduction

3.1 In the following chapter, we consider the ratio of pubs per head of the population in Cambridge relative to regional and national averages, as well as other comparable destinations which may have experienced similar issues in light of current economic and trading conditions and the overall decline of the British pub sector. This analysis will help us draw conclusions as to whether there is, potentially, an over or under supply of pubs within the City of Cambridge, and to help inform our subsequent recommendations.

## National & Regional Analysis

3.2 According to the latest detailed analysis and breakdown of pub stock, it is estimated that there are currently 45,220 pubs across England.[14] Based on the most recent published working age population estimates[15], this equates to a national average of around one pub for every 713 working age adults in England.

Figure 3.1: Analysis of Pub Supply by Region, Per Head of the Resident Population

| Region / Area | Total Number of Pubs | Resident Population (aged 16 to 64) | Adults per Pub |
|---|---|---|---|
| London | 4,504 | 5,392,900 | 1,197 |
| East of England | 4,505 | 3,714,400 | 825 |
| South East | 6,962 | 5,444,500 | 782 |
| North East | 2,313 | 1,699,700 | 735 |
| Total England | 45,220 | 32,256,500 | 713 |
| West Midlands | 4,972 | 3,462,400 | 696 |
| North West | 6,714 | 4,478,200 | 667 |
| Yorkshire & Humber | 5,327 | 3,460,900 | 650 |
| East Midlands | 4,525 | 2,895,100 | 640 |
| South West | 5,398 | 3,313,300 | 614 |
| *Source: Oxford Economics / ONS* | | | |

[14] Oxford Economics, Beer and Pubs – Local Data (published 24th February 2012). Note: 'England' not 'Britain'
[15] Office for National Statistics, 2010 mid-year working age population estimates (16 to 64 years).

3.3 It is important to note that whilst we acknowledge that residents aged 65 years and above also visit pubs, the working age population (16 to 64 years) nevertheless represents the most suitable and consistent level of data available for comparative purposes across all regions / areas.

3.4 As shown, the East of England has one of the highest ratios of working age populations per pub, with 824 working age adults per pub. This is the highest proportion across provincial England, with only London having a higher ratio. This highlights that there is a relatively low supply of pubs, in the region relative to the average for England.

## Local Analysis

3.5 The same data[16] provides a breakdown of pub supply by parliament constituency and indicates that there are currently 105 pubs / licensed premises in Cambridge. Clearly this is more than indicated by our own research which indicates that 86 pubs remain open (or subject to refurbishment). This may be a reflection of the time lag between the surveys and the fact that we believe that the Oxford Economics research team may have used local authority rating lists which will include pubs that are closed but not yet converted and therefore still rated as pubs. In this regard, the Cambridge City public houses rating list has 103 pubs, which is in close correlation with the figure of 105 used in the Oxford Economics survey. Therefore, although these figures may over-estimate the number of pubs still open we believe they provide a fair comparison between each location.

Figure 3.2 Analysis of Pub Supply per Head (All Working Age Residents)

| Location / Area | Total Number of Pubs | Resident Population (aged 16 to 64) | Adults per Pub |
|---|---|---|---|
| Oxford & Abingdon | 176 | 153,899 | 874 |
| East of England | 4,505 | 3,714,400 | 825 |
| Cambridge | 105 | 86,536 | 824 |
| Norwich | 171 | 128,665 | 752 |
| Total England | 45,220 | 32,256,500 | 713 |
| York | 197 | 132,398 | 672 |
| Brighton & Hove | 278 | 186,816 | 672 |
| Canterbury | 116 | 71,726 | 618 |
| Durham | 297 | 171,270 | 577 |
| Bath | 108 | 61,516 | 569 |

*Source: GVAHL research*

[16] Oxford Economics, Beer and Pubs – Local Data (published 24th February 2012)

3.6 As shown, the ratio of working age adults per pub in Cambridge is on par with the regional average. However, it would appear that Cambridge has one of the highest numbers of adults per pub compared to other historic university towns and tourist destinations such as Norwich, Brighton and Bath. Only Oxford comes out as having a higher number of adults per pub within the dataset of comparable cities. This would appear to be an indication of relative undersupply of pubs in Cambridge (and Oxford) compared to the national average and comparable towns.

3.7 Further, when considering the youth population alone (i.e. 16 to 24 years), who are the most frequent pub-goers, Cambridge has the highest number of young adults per pub among comparable cities.

Figure 3.3: Analysis of Pub Supply per Head (All Young Adults aged 16 to 24)

| Location / Area | Total Number of Pubs | Resident Population (aged 16 to 24) | Young People per Pub |
|---|---|---|---|
| Cambridge | 105 | 30,050 | 286 |
| Oxford & Abingdon | 176 | 44,978 | 256 |
| Canterbury | 116 | 24,972 | 215 |
| Norwich | 171 | 32,651 | 191 |
| Bath | 108 | 19,891 | 184 |
| York | 197 | 33,537 | 170 |
| Brighton & Hove | 278 | 43,151 | 155 |
| Durham | 297 | 38,150 | 129 |
| Total England | 45,220 | 6,256,900 | 139 |
| *Source: GVAHL research* | | | |

3.8 It is worth noting at this point that Cambridge has 26 college bars. While these are restricted to the University students and staff, this will divert some spending, particularly by students, from the local pubs. The universities in other cities also have a number of student bars, however due to the collegiate system, with the exception of Oxford, they do not tend to have so many.

3.9 However, even if we add college bars to the total number of pubs in each of the other university towns, then as figure 3.4 shows we still find that Cambridge still has the highest number of young adults per pub and college bar within the data set of comparable towns.

Figure 3.4: Analysis of Pub and College Bar Supply per Head (All Young Adults aged 16 to 24)

| Location / Area | College Bars | Total Number of Pubs and student bars | Resident Population (aged 16 to 24) | Young adults per Pub and college bar |
|---|---|---|---|---|
| Cambridge | 26 | 131 | 30,050 | 229 |
| Oxford & Abingdon | 33 | 209 | 44,978 | 215 |
| Canterbury | 6 | 122 | 24,972 | 204 |
| Norwich | 4 | 175 | 32,651 | 186 |
| Bath | 5 | 113 | 19,891 | 176 |
| York | 7 | 197 | 33,537 | 170 |
| Brighton & Hove | 3 | 281 | 43,151 | 154 |
| Durham | 21 | 297 | 38,150 | 128 |

*Source: GVAHL research (excludes nightclubs)*

## Benchmarking Summary

3.10 There are 713 working age adults per pub in England. By comparison, there are 824 adults of working age in Cambridge per pub, one of the highest ratios of adults to pub among similar historic university towns and cities. If we just look at the number of young adults per pub, as the age group with the greatest propensity to drink in pubs, we find that Cambridge has the highest number of young adults per pub among comparable towns. Even if we allow for the fact that Cambridge has a relative high number of college bars largely restricted to students in this age group, the city still has the highest number of young people per pub and college bar in the comparative dataset.

3.11 As a result, this benchmarking exercise would appear to illustrate that Cambridge has a relative under-supply of pubs compared to other historic university towns and cities which are also strong tourist destinations.

# 4. Local Market Assessment

## Audit of Existing Provision

4.1 In order to inform this study our team has undertaken an audit of every remaining pub in Cambridge. The audit was undertaken in late February 2012. Each pub was visited by a surveyor from our team during the day and assessed according to an agreed standard audit questionnaire to consider pub type, local market, constraints, food offer, drink sales, entertainment, community offer, garden/yard size and quality, smoking area, facilities, maintained standard, investment potential, and accessibility (see Appendix a). A photograph was taken of each pub for future verification.

4.2 The survey results were then compiled in the form of an excel spreadsheet which incorporates further information acquired from desktop research such as electoral ward, population catchment, local plan designation, listed status, ownership, management, planning applications a summary of which is included as Appendix b. The survey results have subsequently been mapped according to key criteria such as pub type, ownership and immediate population catchment.

4.3 We have also briefly audited those that have been closed, but not yet redeveloped. Obviously, it has been difficult to assess these in as much detail as we have been unable to gain internal access.

4.4 Overall, our team audited 111 pub sites, of which 83 were still trading, 2 were closed but undergoing refurbishment (now re-opened), one, the Mill, had closed but was subject to an application for listed building consent for refurbishment works. These are the '86' pubs we refer to as still being 'open'.

4.5 Of the remaining 25;

- three, the former Cross Keys, Blackamoors Head, and the Druids had turned fully into restaurants (Japas, Meghana, and Tang, respectively),
- four, the former Hat & Feathers, Jubilee, Cow & Calf, and Duke of Argyle, had already been redeveloped for housing or flats,
- three, the Five Bells, Fleur de Lys, and Penny Ferry, had received permission for redevelopment,
- two, the Golden Pheasant and the Greyhound currently have applications pending for housing and industrial redevelopment respectively,

- two, the Queen Edith and the Unicorn, had both had recent applications for redevelopment refused,
- one, the Rosemary Branch had had an application for redevelopment withdrawn,
- one, the Rose & Crown had changed to A2 use (Estate Agents),
- one, Henrys, had closed with unimplemented planning permission to change from a café/bar to a restaurant, and
- 8 others were simply closed.

## Market Structure by Type of Pub

4.6 Each pub was categorised according to the following types:-

- **Suburban Community Local** - local pubs situated within residential areas with a high proportion of regular local trade, usually with pub games and simple entertainment, often with a value food offering;
- **Edge of Centre Community** - pubs situated in residential areas outside but close to the town centre, possibly within a cluster of niche real ale or live venue pubs, often on an 'alternative' circuit attracting residents and students from the whole city, as well as locals. Ale led, but may also serve good food;
- **City/Village Tavern** - situated in village/city centres. Looks like a pub inside and out, lots of wood, serves ale. Customers include tourists, weekenders, shoppers, office workers during the day with lunchtime food and could be on the "circuit" for younger trade in the evenings, or could still be food led in evening;
- **City Bar** - situated in town/city centres. Doesn't have pub feel, unlikely to serve ales, less attractive to day-time tourists. Trendy, young trade with possible emphasis on loud piped music. Customers include shoppers, office workers during the day and early evening with lunchtime food and often on the "circuit" for younger 'trendy' trade in the later evenings.
- **Pub-Restaurant** - basically a restaurant dressed as a pub, where the emphasis is on food, but where you order from the bar and where you can still purchase a drink from the bar and take it to your table - e.g. Harvester, Beefeater, normally main road side with lots of parking.
- **Restaurant** - no longer a pub. You have to wait to be seated and cannot (or would not feel comfortable) buy drinks from the bar - even if there is one for show

4.7 These have been mapped in appendix c. This shows that the suburban community pubs are fairly evenly spread around the northern and eastern suburbs of Cambridge. There is also a tighter cluster of these pubs in the area of high density Victorian workers terraced houses to the north of the railway station between the railway and city centre ring road.

4.8 This same area also has an important cluster of Edge of Centre Community pubs and we consider that this area provides an important concentration of pubs not just for the residents in the immediate area but for residents from across the whole city as an area where they can congregate and socialise away from the more student and tourist dominated pubs of the city centre.

4.9 A second cluster of Edge of Centre Community pubs lies along the mostly residential area on the north and north east side of the city centre between Parkside and Jesus College. The community pubs in this area which includes King Street, famous among students for the King Street Run, as well as the Grafton Street shopping centre, are a little more 'chameleon' than those in the station area above, some serving workers, shoppers and tourists during the day in addition to a city wide and local community base at night.

4.10 City bars and taverns are clustered along Regent Street, St Andrew's Street and some other streets in the city centre. Here they serve workers and shoppers with food and drink by day before becoming more drink and music orientated towards young adults by night.

4.11 Another set of city taverns are clustered along the city centre riverside, where they attract tourists by day and city wide residents looking for a nice place to eat and drink in the evening, particularly summer evenings. A couple of the village pubs situated in Trumpington and Cherry Hinton serve a similar city wide role for residents, particularly at weekends.

4.12 Pub-restaurants are spread around the city either alongside main roads in the suburbs, where they also serve a role as community pubs, or within the city or village centres, where they serve more of a destination role.

4.13 The map does not show the categories of the closed pubs, with exception of the three former pubs still trading as restaurants. With regard to the others there obviously has to be some conjecture as to their former nature, however, our surveyors felt that 14 were most likely former suburban community locals, 4 were edge of city community, 1had been converted to restaurants prior to closure, and 3 were former city bars. This shows the particular pressure being felt by suburban community pubs.

## Structure by Ownership

4.14 The survey also records pubs by ownership. This is mapped in appendix d and summarised in the table below:-

Figure 4.1 Pub site ownership in Cambridge

| Owner | Open | Open (now Restaurant) | Closed | Total |
|---|---|---|---|---|
| Greene King | 37 | 1 | 5 | 43 |
| Punch Taverns | 6 | 0 | 5 | 11 |
| Enterprise Inns | 9 | 0 | 0 | 9 |
| Charles Wells | 6 | 1 | 0 | 7 |
| Pubmaster | 2 | 1 | 3 | 6 |
| Mitchell & Bultler | 3 | 0 | 0 | 3 |
| Everards | 2 | 0 | 0 | 2 |
| Spirit | 2 | 0 | 0 | 2 |
| Wetherspoons | 2 | 0 | 0 | 2 |
| Whitbread | 1 | 0 | 1 | 2 |
| Other Breweries | 9 | 0 | 6 | 15 |
| Freehouses | 7 | 0 | 2 | 9 |
| Totals | 86 | 3 | 22 | 111 |

4.15 As this table shows, Greene King own a large proportion of the pubs in Cambridge. At least 43 of the pubs sites we have identified are, or were recently, owned by Greene King, 5 of which have been closed, and one (the former Cross Keys) has been turned into a restaurant (Japas). None of the other brewers or pub-co's comes close to the size of the Greene King estate in Cambridge. Greene King still own 37 of the remaining 86 pubs in Cambridge (43%). This means that Greene King has a very strong influence on the property market for public houses in Cambridge.

4.16 Punch Taverns have, or rather had, the next largest share of pubs with 11 sites, 5 of which have now been closed, almost half their total stock[17]. By contrast Enterprise, who own 9 pubs have not closed any of their pubs in recent years. Charles Wells own 7 sites, all of which are still open, although one pub (the Ancient Druids) has been turned into a Chinese restaurant. Pubmaster, also owned 6 sites until recently, but

[17] Punch did also owned the Fleur de Lys until recently, but this was sold to the tenant who in turn closed the pub and submitted an application to redevelop the site for housing. This pub is included with the Freehouses in the table at figure 4.1

only two are left open as pubs (the Osbourne and the Man on the Moon), while one is trading as a restaurant (Meghana) and three have all been closed (the Royal Standard, the Jubilee, and the Duke of Argyle). The Maypole, is the only former Pubmaster pub to have been sold as a pub, and this is now successfully trading as a freehold and is included in those figures.

4.17 Mitchells & Butler have three pubs, while Everards, Spirit and Wetherspoons have two each. Whitbread would have had a much larger estate before the Beer Orders. They now just operate the Travellers Rest under the Beefeater brand. The Golden Pheasant, a former pub and now a closed restaurant, was formerly a Whitbread pub, but may have passed through other hands since. Other breweries with single site ownership account for 15 pub sites of which 6 have closed. Freehouses account for 9 pub sites, of which 2 have closed (the Fleur de Lys and the Cow & Calf).

4.18 Clearly, some pub co's, notably Pubmaster and Punch, appear to have had an active disposal and/or redevelopment programme over the last few years. Greene King, also seem to have become more active with pub site closures of late, but few if any have been offered for sale as pubs. Pub closure has also been dominant among the pub co's and restaurant companies owning just a single site in the city. Many of these have been part of chains such as Old Orleans, the Slug & Lettuce, and Henry's which have all been subject to national rationalisation programmes during the recession.

## Tied, Managed & Freehouse

4.19 We estimate that 15 of the 22 closed pubs have been drawn from the tenanted estate. Clearly this sector has particularly suffered during the recession. A tenanted pub needs to make enough money to provide a decent living for the tenant and their family, as well as providing a return for the freehold pub-owner. Most tenants are also 'tied' to purchasing their drinks through the pub-co or brewery owner. On the other hand, it does provide a relatively easy entry into the business for tenants who only need to raise about £30,000 to £50,000 to acquire a tenancy. However, this can, in turn lead some into the industry who are not suited to the business.

4.20 It is generally considered that managed pubs have done better than tenanted pubs during the recession, and indeed it is in the larger managed pubs that many of the pub-co's, brewery and restaurant chains have been investing during the last few years. Nonetheless, as we have said, three of the closed 'pubs' – Old Orleans, Henry's and the Slug & Lettuce – are former managed pubs which have all arisen from rationalisation programmes.

4.21 The freehouse sector is quite small in Cambridge with just 9 sites, of which two have closed. One of these was never really run as a free house for any length of time. A free house is not tied to any particular brewery, leaving it free to negotiate its own prices for the drinks it sells. However, the freeholder does need to earn enough to repay either the owners or the bank's investment. Most freehold pubs cost between £200,000 and £350,000, depending on size and location, therefore making it more difficult to enter the business than to take over a tenancy. Indeed, many successful free house landlords have learnt their trade in the tenancy sector.

## Pubs by Population Catchment

4.22 We have also mapped pubs with simple 400m walking catchments to identify areas of under-provision and the affect of pub closure. This distance is generally accepted as being a comfortable 5 minute walk and is often applied to planning for the planning of adequate provision of community facilities to serve residential areas – for example public transport services and children's play areas[18]. It is therefore a reasonable measure pub deficiency, especially for suburban community pubs which will tend to draw from a smaller catchment than edge of centre community, city taverns or bars.

4.23 We have also sought to estimate the total and working population within the 400m catchment of each pub. This can be done in one of two ways. We can take the total population of all Enumeration Districts partly within the catchment which will always result in an over-estimate of the population within the catchment. Or, we can take the aggregate population of the Enumeration Districts with a centre point within the 400m catchment circle. This is more likely to reach an average population for the catchment area, but may result in an underestimate in some cases. Both population estimates are presented in the audit spreadsheet, but we use the lower estimate for the rest of this anaylsis.

4.24 Appendix e provides a map showing the current areas of deficit including those pubs that have closed but that have not yet applied for or been given permission for redevelopment. Appendix f shows how the areas of deficit would be increased through the permanent closure of these pubs.

[18] See: i) Urban Design Compendium Part I, Building walkable neighbourhoods, Section 3.2.1
ii) Sustainable Settlements: A Guide for Planners, Designers and Developers Sustainable Communities: The Potential for Eco-Neighbourhoods by Barton cites, Figure 6.2 - Possible Standards for Accessibility to Local Facilities'
iii) National Playing Fields Association Standards for play provision; criteria for Local Equipped Area of Play

4.25 Comparison of the two maps shows the particular importance of retaining The Queen Edith (ref no 96). An estimated 912 working age adults live with within 400m of this pub significantly above the national, regional or local average. Without this pub, the community in these areas would not have a pub within easy walking distance. The same could be said of the Rosemary Branch (41), however, this is within a largely industrial area with a relatively small estimated population of only 215 working age adults within 400m. Obviously, this is significantly less adults per pub than the national, regional or local average.

4.26 The maps also shows that the permanent loss of the Grove (99), the Haymakers (95), the Fleur de Lys (90) will also have a significant affect on the community pub provision for the residential communities around these pubs, where more than half of those within their 400m catchment now have to walk more than 400m to reach their closest pub. It is a similar situation with regard to the Greyhound (98), however, as with the Rosemary Branch, this pub lies at the entrance to an industrial area. Although there is a relatively healthy adult catchment population of 866, some of these are within 400m of other pubs and most would have to cross a busy road to reach the pub.

4.27 The permanent loss of the Carpenters Arms (87) and the Royal Standard (91) would also lead to the loss of a community facility for a proportion of the 2,612 and 2,985 working age adults respectively within 400m of each pub.

4.28 Obviously, for any of the town centre pubs currently under closure there will normally be an alternative pub within 400m walking distance. However, these pubs are serving a wider than local community market and there are wider considerations with regard to the functioning of the local economy and its ability to attract tourists and the brightest students, academics and entrepreneurs. Just as with other successful city economies the city's eating and drinking offer is a key factor in attracting young people and tourists. In addition, the city centre pubs tend to specialise, so that although there may be four very close together, three may address rather different city wide markets, and the only the fourth may address a local community market.

4.29 To illustrate this affect we have produced a third map, as appendix g, which just shows 400m catchments around the suburban community local pubs, on the basis that the other types of pub serve a much wider city-based market. This illustrates the much thinner spread of pubs serving a straightforward local community role.

## Local Market Assessment

4.30 By combining the information from our assessment of market trends with the audit of existing provision we can begin to put together a picture of the health of the local pub market.

4.31 Clearly there has been a recent decline during the recession in the national pub market, and this has affected Cambridge, just as anywhere else. However, in comparison with the England average and with other historic university cities, Cambridge would appear to have a disproportionately low number of pubs per person, even when accounting for the relatively large number of college bars for the younger (student) market. Therefore, in quantitative terms there does not appear to be an oversupply of pubs in Cambridge relative to population size. If anything there would appear to be a shortage.

4.32 In qualitative terms it would appear that closure has affected all types of pub. However, the greatest impact appears to have been upon the suburban community local, which might be expected given the disproportionate impact of the smoking ban, high bar prices, low supermarket prices, and unemployment on the C2DE socio-economic groups and their propensity to visit their local pub. In some of these suburban areas it is more difficult for the pubs to diversify into an improved food/drink offer as that may require a larger market catchment and one drawn from a higher socio-economic grouping.

4.33 In spatial terms, the closure of a disproportionate number of suburban community locals has increased the deficiency in provision for a number of suburban communities.

4.34 Spatially, our market assessment has also demonstrated the importance of the following clusters of pubs:-

- A cluster of edge of centre and local community pubs between the railway and city centre serving both a city wide and local market for residents.
- A band of edge of centre community pubs to the north of the city centre serving shoppers and workers during the day and residents and students at night.
- A cluster of city bars and taverns along Regent Street, St Andrew's Street and some other streets in the city centre serving tourists, workers and shoppers with food and drink by day and local young adults by night.
- A set of city taverns clustered along the riverside where they attract tourists by day and city wide residents by night.

4.35 The maintenance of each of these clusters is important to the continue prosperity of the Cambridge economy, in particular to its retail, tourism, office, academic and high technology sectors. An attractive city centre with places to eat and drink is particularly important to Cambridge to maintain its appeal to shoppers, tourists, students and the bright young professionals and entrepreneurs that drive the local economy.

# 5. Review of Planning Policy & Decisions

## Introduction

5.1 In this chapter we provide a review of national and local planning policy as it affects applications to redevelop or change the use of public houses. This includes a review of relevant policy at other local authorities. We also review planning application decisions both locally and in other districts through officer's reports and inspector's decisions to review how the issue has been dealt with by applicants, local authorities and inspectors to identify significant lessons for policy.

## Planning Policy Review

5.2 In this section, underlining is added to policy text to add emphasis or pick out the most relevant text.

### National Planning Policy Framework

5.3 National planning policy is now set out in the Coalition Government's National Planning Policy Framework (NPPF) as recently published on 27 March 2012. All previous Planning Policy Guidance Notes (PPGs) and Statements (PPSs) have now been replaced by the NPPF, and therefore are not discussed any further in this report.

5.4 The NPPF sets the achievement of sustainable development as its key focus. In this regard paragraph 7 states that:

> *"There are three dimensions to sustainable development: economic, social and environmental. These dimensions give rise to the need for the planning system to perform a number of roles:*
>
> ***an economic role –*** *<u>contributing to building a strong, responsive and competitive economy</u>, by ensuring that sufficient land of the right type is available in the right places at the right time to support growth and innovation; and by identifying and co-ordinating development requirements, including the provision of infrastructure;*
>
> ***a social role*** *– <u>supporting strong, vibrant and healthy communities</u>, by providing the supply of housing required to meet the needs of present and future generations; and by creating a high quality built environment, <u>with accessible local services</u> that <u>reflect the community's needs</u> and support its health<u>,</u> <u>social</u> and cultural <u>well-being</u>; and…"*

5.5 Public houses support these two roles. They are a unique part of British culture and as such they have an essential role to play in the building and maintaining a strong, responsive and competitive local economy. Without its pubs, Cambridge will not be able to attract the students, academics, entrepreneurs, young workers and tourists that its economy and future growth depend upon. Moreover, pubs help to support social and cultural well-being by providing a place for social interaction within a community. A thriving local pub sector is therefore important to achieving sustainable development.

5.6 Paragraph 21 states that in drawing up local plans, local planning authorities should *"support existing business sectors, taking account of whether they are expanding or contracting…policies should be flexible enough …to allow for a rapid response to changes in economic circumstances".* Paragraph 22 states that: *"Planning policies should avoid the long term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose".* It is therefore important that any local planning policy to support the local pub sector is still flexible enough to allow for that sector to expand or contract in response to changing economic circumstances.

5.7 Paragraph 23 states that Local Authorities should *"recognise town centres as the heart of their communities and pursue policies to support their viability and vitality".* More than ever, pubs and bars, are an important part of the vitality of the town centre, making it an attractive place for people to live in, work in, and visit.

5.8 Paragraph 156 also set the strategic priorities for the area in the Local Plan and that these should include policies to deliver: *"the provision of health, security, community and cultural infrastructure and other local facilities; and"*.

5.9 Under "Promoting Healthy Communities", paragraph 69 states that:

> *"The planning system can <u>play an important role in facilitating social interaction</u> and creating healthy, inclusive communities. Local planning authorities should create a shared vision with communities of the residential environment and <u>facilities they wish to see</u>. To support this, local planning authorities should aim to involve all sections of the community in the development of Local Plans and in planning decisions, and should facilitate neighbourhood planning. Planning policies and decisions, in turn, should aim to achieve places which promote*
>
> - *<u>opportunities for meetings between members of the community who might not otherwise come into contact with each other</u>, including through mixed-use developments, strong neighbourhood centres and active street frontages which bring together those who work, live and play in the vicinity;*

- *safe and accessible environments where crime and disorder, and the fear of crime, do not undermine quality of life or community cohesion; and*

- *safe and accessible developments, containing clear and legible pedestrian routes, and high quality public space, which encourage the active and continual use of public areas."*

5.10 The public house has long been an established part of the community, one that people want to have access to and one that promotes social interaction. It is therefore a valid local planning policy objective to retain public houses in order to provide such a place for social interaction.

5.11 Paragraph 70 is probably the most important and we know from discussions with your development control officers that they have referred to this guidance in recent refusals of applications to convert or demolish public houses. Paragraph 126 is about delivering community facilities and services. It recommends that planning policies and decisions should:

- *plan positively for the provision and use of shared space, community facilities (such as local shops, meeting places, sports venues, cultural buildings, public houses and places of worship) and other local services to enhance the sustainability of communities and residential environments;*
- *guard against the unnecessary loss of valued facilities and services, particularly where this would reduce the community's ability to meet its day-to-day needs;*
- *ensure that established shops, facilities and services are able to develop and modernise in a way that is sustainable, and retained for the benefit of the community; and"*

5.12 The important thing here is that national planning policy advises us that community facilities (including public houses) that enhance the sustainability of local communities should be safeguarded.

5.13 Paragraph 28 states that:

*Planning policies should support economic growth in rural areas in order to create jobs and prosperity by taking a positive approach to sustainable new development. To promote a strong rural economy, local and neighbourhood plans should:…*

- *promote the retention and development of local services and community facilities in villages, such as local shops, meeting places, sports venues, cultural buildings, public houses and places of worship."*

5.14 Although this policy relates to rural areas, we believe that it relates to the retention of public houses in outlying areas of Cambridge such as Trumpington and Cherry Hinton.

5.15 This 'sets the scene' for more local policies that clarify which facilities are essential for community needs.

## Local Planning Policy

5.16 In this section we look at the adopted Cambridge Local Plan and any relevant documents produced so far in the Local Plan Review process.

### Cambridge City Council Local Plan 2006

5.17 We understand that the Cambridge Local Plan was formally adopted at a meeting of full council on 20 July 2006, following a period of review, which began in 2001.

5.18 Saved Policy 6/6 "Change of Use in the City Centre" states that:

*"Change of use from A1 to A2, A3, A4 or A5 uses at ground floor level will only be permitted:*

*a) in primary shopping frontages where the proposal would not harm the contribution the frontage makes to the vitality and viability of the City Centre; and*

*b) in secondary shopping frontages where the percentage of A1 uses does not fall below 60% (measured by number of units), except for Regent Street / St Andrew's Street (south of Downing Street) where the percentage of A1 uses should not fall below 25%, and Bridge Street (north of Round Church Street) where the percentage of A1 uses should not fall below 40%."*

5.19 This Policy relates solely to change of A1 retail units in city centre's and seeks to protect their loss to other A uses. This Policy therefore provides no protection for other A uses such as public houses, or for restaurants that were formerly public houses.

5.20 We note that Paragraph 6.23 of the postamble states that both the Regent Street/St Andrews Street and Bridge Street secondary shopping frontages have a high proportion of restaurants/cafes/pubs and that these make for a distinctive character.

5.21 Saved Policy 6/7 "Shopping Development and Change of Use in District and Local Centre's" states that:

*"Additional development within classes A1, A2, A3, A4 and A5 will be permitted in District and Local Centre's if it will serve the local community and is of an appropriate nature and scale to the centre.*

*Change of use from A1 to A2, A3, A4 or A5 in District and Local Centre's will only be permitted provided the percentage of A1 uses does not fall below 60% (measured by number of units). Change of use from A1 to other uses will not be permitted."*

5.22 Again, this policy only protects A1 uses rather than A3 or A4 uses. However, it could be adapted into a new Policy as part of the Local Plan Review and used to also protect all A uses. This would retain sufficient flexibility to allow for a change of use from A4 drinking establishment uses into say A3 restaurant & café uses in response to market changes, but prevent the loss of non-A1 uses to non-A uses such as residential within District and Local shopping parades.

5.23 Saved Policy 6/10 "Food & Drink Outlets" states that:

*"Developments for Use Classes A3, A4 and A5 (food and drink) will only be permitted:*

*a) where the proposal will not give rise to unacceptable environmental problems or nuisance and the individual and cumulative impact of the development is considered acceptable; and*

*b) it is in an existing centre or is part of a mixed use area in an urban extension or the Station Area."*

5.24 There is no element to this Policy which seeks to protect existing public houses. Furthermore, this Policy effectively deters any new public house applications from being made in residential areas – where there might be a demand for a community public house.

5.25 Overall, the 2006 Local Plan policies on change of use of A class uses are absent on the principle of protecting public houses from redevelopment or conversion to other uses. It should be recognised that the loss of public houses was not an issue back in 2006. However, there is a Policy that has regard to the protection of Community Facilities – however, pubs are excluded from the definition of community facilities in paragraph 5.20-23 of the Plan.

5.26 Saved Policy 5/11 "Community Facilities: Protection of Existing Facilities" states that:

*"Development leading to the loss of community facilities will only be permitted if it can be demonstrated:*

*a) the facility can be replaced to at least its existing level and quality within the new development; or* *b) the facility is to be relocated to another appropriate premises or site of similar accessibility for its users; or*

*c) that there is no longer a need within the local community for the facility or that the need can be adequately met at an alternative facility of similar accessibility for its users.*

*The redevelopment of school sites for other uses will be permitted only if it can be demonstrated that they are not required in the longer term for continued education use."*

5.27 While this Policy could be useful in defending applications/appeals to convert public houses pubs are not specifically referred to in the Local Plan. In the policy postamble, community facilities are considered to be those that "*help meet the varied needs of the residents of Cambridge for health, education and public services, as well as social, cultural and religious activities".* We would contend that certain community pubs are capable of providing for these needs particularly those where a meeting space is available. To fulfil the terms of this Policy, Developers are required: *"to provide adequate evidence of a lack of local need, accessibility to users, the capacity of alternative facilities and of the level of demand from other organisations providing community facilities in order to justify the loss of a community facility."*

5.28 The Policy postamble goes on to request the following information:

- *details of site marketing attempts made to attract other community uses for which the premises are suitable;*
- *demonstration of site accessibility to users by all means of transport including foot and cycle;*
- *details of current or most recent use of facilities;*
- *evidence of spare capacity or agreement to accommodate displaced users at other equivalent facilities with similar accessibility for users; and*
- *a local survey to establish the level of interest in and viability of the continued use of the premises as a community facility.*

5.29 With the exception of the second and perhaps the fourth bullets, the requirements could quite easily be adapted and incorporated into a policy designed to protect community pubs.

### Local Plan Review

5.30 A new Cambridge Local Plan is currently being prepared and we understand that the current stage is the preparation and completion of the evidence base and the issues and options consultation is scheduled for June to July 2012.

## Planning Policies of other Local Planning Authorities

5.31 In this section, we look at planning policies dealing with the protection of public houses as adopted or proposed by local planning authorities elsewhere in England. We will start with those authorities which neighbour or are in the same region (Eastern England) as Cambridge (where applicable). We will then look at planning policies from other local authorities.

### Norwich City Council

5.32 Norwich City Council is proposing through their Local Development Framework a specific policy that seeks to protect community pubs. The proposed policy forms part of the Development Management Policies Document, which underwent public consultation between 27 January and 24 March 2011.

5.33 Proposed Policy DM22 "Provision and Enhancement of Community Facilities" is listed under the Community Facilities section of the document. The relevant section of the proposed policy states that:

> *"Protection of community facilities*
>
> *Development resulting in the loss of an existing community facility (excluding community public houses listed in appendix 6) will only be permitted where:*
>
> *a) adequate alternative provision exists or will be provided in an equally or more accessible location within 800 metres walking distance; or*
>
> *b) all reasonable efforts have been made to preserve the facility but it has been proven that it would not be economically viable to retain the building or site for its existing use; and*
>
> *c) the property or site has been marketed to the satisfaction of the Local Planning Authority in order to confirm that there is no interest in the property or site for the current use or a different community use.*
>
> *Development resulting in the loss of community public houses, listed in appendix 6, will only be permitted where criteria b) and c) above are satisfied.*

*Where it is demonstrated that an existing community use is not viable, preference will be given to the change of use or redevelopment to other community uses before non community uses are considered. The redevelopment of all existing community sites and premises should provide a new community facility as part of the proposal.*

*The involvement of the local community will be sought in identifying the importance of local facilities and in developing appropriate solutions for their retention and enhancement."*

5.34 So, in order for a community public house to be redeveloped/converted in Norwich, it will be necessary to prove that it is not economically viable to preserve the public house and that the public house has been marketed in order to confirm that there is no interest in it either as a public house or other community facility.

5.35 Appendix 6 of the draft document sets out a list of protected pubs and states that: *"Pubs merit protection for their value as heritage assets, whether designated or undesignated. This may include their intrinsic value as longstanding community facilities irrespective of any architectural or historic merit they may possess."* It goes on to say that for inclusion in the list, the building must:

*(a) have an established use as a public house or café bar (use class A4); and*

*(b) have served the community as licensed premises for a significant period of time (1900 or before), or if built after that date, have been purpose built as a public house to serve the local community within a housing area or estate. Priority will be given to protection of public houses which are the last such public house in the area.*

5.36 The list in Appendix 6 contains some 75 pubs which meet the criteria above but Norwich City Council state that they are seeking views of the local community on whether the pubs listed are the most appropriate pubs to seek to protect. We agree that it may be appropriate to protect a public house in view of its intrinsic value as a longstanding community facility.

### Peterborough City Council

5.37 Peterborough have a Policy in their adopted Core Strategy Document (Policy CS18 "Culture Leisure and Tourism") which discusses the encouragement and promotion of such developments. The final paragraph states that:

*"The existing cultural, leisure and tourism facilities will be protected and enhanced. Planning permission will only be granted for a scheme which would result in the loss of an existing cultural, leisure or tourism facility if it can be demonstrated that the use*

*is no longer viable, or an appropriate alternative is to be provided, which is at least equivalent to that lost in terms of quantity and quality and is in a sustainable location to best meet the needs of users."*

5.38 However, this only provides broad guidance and indeed, there is nothing specific to say that 'cultural, leisure or tourism facilities' includes public houses. We note that there are no public house specific policies in the proposed Development Management Policies document.

5.39 The glossary to the adopted Core Strategy does clarify that community infrastructure/facilities can include public houses but there is no specific community facility protection policy.

**London Borough of Merton**

5.40 Merton's Unitary Development Plan was adopted in October 2003. Saved Policy L.16 "Protection of Public Houses" states that:

*"THE COUNCIL WILL NOT PERMIT THE REDEVELOPMENT OR CHANGE OF USE OF ESTABLISHED PUBLIC HOUSES TO OTHER USES EXCEPT WHERE:*

*a. THE APPLICANT CAN SHOW THAT THE PUBLIC HOUSE IS NO LONGER ECONOMICALLY VIABLE*

*b. THE APPLICANT CAN SHOW THAT REASONABLE ATTEMPTS HAVE BEEN MADE TO MARKET THE SITE AS A PUBLIC HOUSE*

*c. THERE IS ALTERNATIVE PROVISION WITHIN THE LOCAL AREA"*

5.41 The postamble goes on to say that:

*"4.216 <u>Public houses in residential areas can provide a valuable community facility</u> and some public houses have <u>community/function rooms that can be used for a variety of uses</u>. In recognition of the fact that public houses can play a valuable role as a local and community facility <u>established public houses should be protected from redevelopment or change of use</u>. This policy would not apply to public houses within designated town centres (as shown on the proposals map).*

*4.217 In order to satisfy the tests set out in this policy applicants need to provide evidence clearly showing that the public house is no longer economically viable and that <u>the property has been marketed as a public house for a reasonable period usually no less than a period of 2 years</u>. This is likely to mean showing evidence of the appointment of property consultant/estate agent to handle the marketing of the property and records of how and where the property has been marketed.*

*Applicants may also carry out an assessment of the needs of the local community for community facilities to show that the public house is no longer needed and that alternative provision is available in the area."*

5.42 Merton is currently consulting on their Draft Policies and Sites Development Management Document (30/01/12 to 23/03/12). Proposed Policy R5 "Food and Drink/Leisure and Entertainment uses" states that:

*"Protection of public houses*

*(g) Proposals that will result in the loss of a public house will only be permitted where all the following criteria are met:*

1) *the applicant can demonstrate to the council's satisfaction that the public house is no longer economically viable through full and proper marketing; and,*

2) *there are alternative public houses located within the local area".*

5.43 The post amble goes on to clarify that pubs must be marketed for 2 and a half years; and that alternative provision must be within 800m from the site.

5.44 We consider both the existing and proposed policies (which are essentially the same) to be useful in terms of defining what is a community public house - particularly that it is those in residential not commercial areas and it is those with a function room. However such a Policy would not be well suited to Cambridge as it would always be possible to show that there is alternative provision.

## Other Local Authorities

5.45 We have looked through a selection of Supplementary Planning Guidance (SPG) produced by Local planning Authorities across England. These included the following (in no particular order)

- West Berkshire Council – Supplementary Planning Guidance "No.19 Public Houses";
- Ribble Valley Borough Council – Supplementary Planning Guidance "The Retention of Public Houses in Rural Areas";
- Huntingdonshire District Council – Supplementary Planning Guidance "Retention of Shops, Post Offices and Public Houses in Villages"; and

- Mid Suffolk District Council – Supplementary Planning Guidance "Retention of Shops, Post Offices and Public Houses in Villages".

5.46 Clearly, the majority of those above deal with loss of rural pubs. However, we consider it useful to look at their approach and see if anything can be transferred to a more urban setting.

5.47 West Berkshire's SPG has a section setting out criteria to be used in the assessment of applications for development resulting in the loss of a public house. It states that:

*"6.1 The criteria to be used in the assessment of applications for development resulting in the loss of a public house, will be as follows:*

1. *whether it would have an adverse effect on the local character, diversity and amenity of the area;*
2. *whether it can be demonstrated that alternative acceptable public house provision exists (defined in terms of location, size, range of facilities and quality of provision) or can be made available in the local area/community;*
3. *evidence exists that the loss of the public house would comprise an unacceptable decline in the standard of community services for locals and visitors;*
4. *whether it can be demonstrated that the public house is no longer economically viable and that all reasonable attempts have been made to sell or let the building as a public house at a realistic price for no less than 6 months*

*Any attempts to sell the business at a price which reflects its current use should relate to the business in its entirety, and not to parts of it, for example the buildings without the accompanying garden or car park. Evidence to demonstrate a sale has been unsuccessful would need to include estate agents literature, schedules of potential purchasers and trading figures.*

*A commercial viability study should accompany any application for redevelopment or change of use. Evidence should be produced to show what measures have been taken in an attempt to return a public house to a viable business. This could include details of commercial initiatives introduced, development proposals for the business etc.*

*Other Considerations*

*The partial redevelopment or change of use of a key facility (such as the car park or garden) will not be permitted where it is considered that this may prejudice its* *economic viability or future operation. The Council will encourage the combination of services or activities, such as post offices, shops or related brewing functions with the existing public house use. Where redevelopment or change of use is acceptable, all normal planning control criteria would apply, including impact on amenity, design, access, parking etc*

*6.2 The loss of a public house from a village or rural community can be especially severe if it is the only remaining facility in the area and is a focal point for the community. Public houses in this situation are vital to the wellbeing and social structure of the area. The importance of any particular public house as a community facility can be gauged by discussions with both the Parish Council and local residents.*

*6.3 It must be accepted that planning authorities cannot control the closure of businesses where there is little or no support and which are not economically viable. In principle, favourable consideration will be given to proposals which may help to support and diversify activities which serve the retention of the public house."*

5.48 We have already seen parts 2 and 4 of the listed criteria in other policies/policy notes. However, parts 1 and 3 are new. Notwithstanding, we suspect that part 1 (impact on character) would be dealt with as part of the redevelopment application and in most cases if a particular building is considered to be a key part of the local character then it would be listed or form part of a Conservation Area. Part 3 might not apply so well to an urban setting as there are likely to be community centres, libraries, leisure centres etc that can provide the necessary community service to local people.

5.49 The Ribble Valley's SPG advises that applicants will need to demonstrate that a public house is no longer economically viable and has been adequately marketed. There is nothing new here. However, the SPG goes on to say that an application will be refused if it is considered *"that the closure of the public house is likely to have a significant detrimental impact upon the visual impact attractiveness and social or economic vitality of the village"*. The SPG also discusses alternative ways to keep pubs open including the setting up on micro-breweries, sharing the premises with other businesses including chemists/post office, hiring rooms out to local meetings and offering take away services.

5.50 Huntingdonshire's SPG again reflects those criteria that we have seen before. However, they also state that:

*"Planning Permission will not be granted for a change of use that would result in the loss of the last remaining public house in a village unless it can be demonstrated that:*

*(2) There is little evidence of public support for retention of the facility"*

5.51 Clearly this only applies in this case when it is the last public house in the village and therefore this will not apply to Cambridge. However, there is the potential to adapt something like this into an IPPG for Cambridge. Requiring developers to carry out community consultation beforehand (i.e. to assess local opinions on loss of the public house) and submitting this with the application would not only be in the spirit of localism but also accord with community consultation objectives. The planners could then use this information as an indicator of community value.

5.52 Mid Suffolk's SPG again reflects the guidance and advice we have seen elsewhere. However, one key difference is that there is a specific distance given for the assessment of alternative facilities. This is defined as either within the settlement boundary or within 300m of it. This could be modified for use in a policy protecting urban pubs.

### Pubs and Places (2nd Edition)

5.53 Whilst not an actual Planning Policy or SPG, we consider that this Institute for Public Policy Research document as published in January 2012 is useful in terms of the way it defines community pubs – and that this could have a bearing on the production of new supplementary planning guidance.

5.54 Section 1.1 "What is a Community Public House" includes:

*"In this report we are concerned specifically with community pubs, which market researchers CGA Strategy define as 'pubs that serve predominately their local residential community'. These pubs make up 57 per cent of the total licensed on trade in the UK (CGA Strategy 2009). These can be distinguished from town centre bars which serve mainly after-work or weekend drinkers and which have been the focus of concerns about binge drinking in recent years. Community pubs can also be distinguished from food-led pubs, which people visit predominantly to have a meal rather than to drink*

*Community pubs have two distinct but intrinsically related functions. One is as a retail outlet to sell alcoholic drinks and the other is as a place for social interaction (Boston 1975). The drink and the socialising of course go hand in hand: after a few alcoholic drinks, the often random social encounters that occur in pubs become much easier as people shed their inhibitions. A public house without drink would not be a public house.*

*At the same time, pubs are not just about beer: if everyone visited a public house to drink alcohol on their own, a definitive component of public house culture would be* *lost. The community public house at its heart is an institution for social drinking and it is from fulfilling that function that so many of its positive benefits flow."*

5.55 This would appear to suggest that community pubs are those in residential areas and which are not food focussed. We are not sure that this is correct. The majority of pubs now serve food of every increasing quality, but this does not undermine their role as a local community facility, rather it enhances it and makes them more attractive to women and families.

5.56 The Report also mentions at 2.3.2 that there used to be a trend for pubs to serve industrial areas and the male working class population who would go for a pint on their way home. This may no longer apply in the modern landscape but there may be an argument that some of Cambridge's pubs serve office/business uses or other large employment centres that might be outside of the city centre.

5.57 Section 3.1 of the report deals with Social Networks. It highlights the importance of pubs as places to meet people and spend time with family. It might be the case then that pubs are more likely to be considered community pubs if they are open to all – for example children (and potentially pets). Such pubs could be considered to offer an inclusive community function.

5.58 Chapter 4 of the report talks about how to measure the community value of a public house and discusses the 'social return on investment' (SROI) approach (page 44 of the report). The Report describes SROI as:

*"SROI is a way of understanding, measuring and reporting the social, economic and environmental value that is created by an organisation. It enables us to quantify the social costs and benefits of an organisation and express them in monetary terms, even if they don't actually have a price tag attached to them in real life."*

5.59 We have not set out the full process of assessing SROI in this report as it is explained sufficiently in the IPPR report. However, it could be possible to require developers to carry put SROI on pubs they wish to develop and for this to be a part of supplementary planning guidance. Certainly the IPPR report considers that: *"This type of methodology could be employed by publicans seeking to apply for third sector grants, for example. Or it could be employed by local authorities in seeking to determine which pubs in their area could qualify for business rate relief."*

## Policy Summary

5.60 The new National Planning Policy Framework seeks to support sustainable communities and in this context public houses may be valued for their economic role in supporting local economies, their social role in providing a local facility social interaction, and their environmental role in providing an intrinsic part of the cultural and historic heritage of the areas in which they are sited.

5.61 The Framework states that local authorities should plan positively for the provision of community facilities such as public houses, guard against their unnecessary loss, and ensure that policies are flexible enough to allow such facilities to modernise and be retained for the benefit of the community (paragraph 70).

5.62 Norwich City Council are currently proposing a policy to form part of their LDF that will protect community pubs and require developers to prove they are no longer economically viable and have been marketed as a public house for an adequate length of time. Norwich currently define community pubs as those with an established use and longstanding presence. They are consulting on whether this is the right approach.

5.63 Meanwhile, Merton Council have an existing policy (and propose similar in their LDF) which is useful in terms of defining what is a community public house - that it is those in residential not commercial areas and it is those with a function room. Protection of these is then offered on the basis of whether the public house is economically viable, whether it has been marketed (the same as Norwich's approach) but also whether there is alternative provision in the local area. We are not sure whether this last criterion is useful as it is likely, for the most part, that in an historic urban context there are more than likely to be other public houses in a particular local area, however, that doesn't mean that there may be economic, social or environmental reasons to justify their retention.

5.64 We also looked at a number of more rural based policies. These offered additional criteria such as (a) whether an adverse effect on local character/diversity/amenity; (b) whether evidence exists to show that the loss of public house comprises unacceptable decline in the standard of community services; and (c) whether there is evidence that there is no public support for the retention of the public house. However, we are not sure whether these all translate well to the urban area.

5.65 Finally, we looked at the IPPR's Pubs & Places Report which offers criteria as to what is a community pub. The Report also discusses the social interaction aspect and highlights the value of pubs as places to meet the family. The 'social return on investment' (SROI) approach is also discussed and this could be a useful approach to measuring the value of a public house – potentially one that developers could be required to do as part of the application submission.

# Review of Planning Decisions

5.66 In this section, we are principally analysing planning decisions concerned with the loss of or redevelopment of public houses. In particular, we look at a selection of recent national appeal decisions. We also look at the planning history of those pubs that Cambridge has lost in recent years.

## Relevant National Appeal Decisions

5.67 We have reviewed a number of the appeal decisions relating to public houses principally looking for any definitions of (a) community use; (b) viability; and (c) adequate marketing. Those decisions we looked at are as follows:

- 37 MANOR ROAD, SOUTH HINKSEY, OXFORD OX1 5AS;
- 38 HIGH STREET, RISELEY, BEDFORD MK44 1DX;
- FORMER PUBLIC HOUSE SITE, THE GREEN, SCHOOL ROAD, MAWSLEY CHASE, MAWSLEY VILLAGE, NORTHAMPTONSHIRE;
- THE CROWS NEST, 64-66 HAZLETON WAY, WATERLOOVILLE PO8 9BT;
- THE SWAN PUBLIC HOUSE, ALDERTON, SUFFOLK IP12 3BL;
- THE SWAN, 42 PARK STREET, ST ALBANS, HERTFORDSHIRE;
- THE WHITE SWAN INN, MAIN STREET, SHAWELL, LEICESTERSHIRE LE17 6AG; and
- WORTHENBURY ARMS, CHURCH ROAD, WORTHENBURY, LL13 0AN (WALES).

### 37 Manor Road (Ref 100-074-761)

5.68 This appeal concerned a change of use from a mixed use A4 public house and C3 house to a wholly residential use. The site is located within a village just outside of the City Council boundary but whilst considered isolated is not a typically rural location. The public house had closed in 2008.

5.69 The Council were concerned that the loss of the public house would have severe implications for thriving and sustainable communities. Vale of the White Horse's adopted Policy requires evidence on whether the public house is an important local community facility and whether the continued use as a public house would be economically viable.

5.70 The Inspector noted that the public had indicated that the public house had been home to some informal groups, that the public were currently operating a 'mock public house' in a house, that the public house garden area was valuable in terms of safe play space for children and that aside from the village hall, there were no other community facilities in walking distance. The Inspector thus considered the public house to be an important local facility.

5.71 The Inspector went on to note that there was significant evidence from local residents that poor operation of the public house was a contributory factor to the poor financial return. The Inspector also considered that proposals to increase profitability had not been thoroughly pursued. There were also concerns as to the market coverage for the public house use and the high asking price.

5.72 The Inspector concluded with:

> **There is evidence the public house is an important local community facility and it has not been demonstrated that the continued use as a public house would not be economically viable. The proposal conflicts with the provisions of the development plan, in particular Policy CF5 of the Vale of White Horse Local Plan. For the reasons given above I conclude that the appeal should be dismissed.**

5.73 The appeal was dismissed on 07 November 2011.

### 38 High Street (Ref 100-070-509)

5.74 This appeal concerned a change of use from a public house (The Five Bells) to a single house. The site is located within a village. The main issue was whether the proposal would result in the undesirable loss of an important community facility. The public house had closed in December 2008.

5.75 The Inspector noted that there were two pubs in the village and that the population was around 1000. The Inspector considered that if the Five Bells were lost then there would only be 1 public house for 1000 people and that this would be a disproportionate low level of public house provision. Further the other public house was primarily focused with dining than drinking.

5.76 The public house previously offered local sports teams, a quiz, a venue for local committees and other social events. These have transferred elsewhere but the Inspector ruled that these would be better placed operating from a public house – and that the second public house had not taken on these activities. There was therefore an impact on local services and communities.

5.77 As with the first case (Oxford), the appellant had not taken steps to diversify the business in this case by adding a kitchen and serving food. Furthermore, there was doubt raised as to the how the asking price had been come to and the financial analysis was considered to be insufficiently thorough.

5.78 The appeal was dismissed on 12 January 2011.

### Former Public house Site, Mawsley Village (Ref 100-072-932)

5.79 This appeal concerned the development of eight houses on a former public house site in a village. The village was a new settlement of 750 dwellings and the land had been allocated in the masterplan as a public house site. Planning permission had previously been granted for a public house but had not been implemented and had lapsed. One of the three issues was whether the proposal would result in the loss of an opportunity to provide a local facility important in sustaining the social and economic life of the settlement.

5.80 The Inspector found no realistic alternatives within the village ruling out the community hall (which has a bar) on the basis that it did not serve food.

5.81 The Inspector noted that the guide price was set before the commencement of the recession, that there was no indication that it had been revised after this time and that the bulk of the marketing had been during the recession. Furthermore, there was no viability appraisal and the village had grown to 1000 dwellings thus raising the argument that a public house could be sustained locally.

5.82 The appeal was dismissed (not just on the above issue) on 12 July 2011.

### The Crows Nest (Ref 100-075-933)

5.83 This appeal concerned the demolition of the public house and erection of 3 dwellings. The site is located in suburban Waterlooville in a predominantly residential area.

5.84 We understand that a previous appeal for 4 dwellings had been dismissed in part because the public house had not been marketed at a realistic price to test whether the premises could be operated as a public house in the future or converted to another community facility.

5.85 The main issues were:

> a) Whether the premises are no longer viable as a public house and whether they are viable for any other use which would provide a beneficial facility to the local community.
>
> b) Whether the public house is important to the local community or it is no longer required for a community use or there is an easily accessible existing or new facility for the community it serves.

5.86 As regards the marketing this is discussed at length in the decision and the Inspector notes the improvements from the first application which included approaches to community groups & other local public house/restaurant owners, a reduced asking price, marketing in the rental sector and the use of a signboard. However, the marketing period lasted only 6 months not the 12 as required by the Policy.

5.87 The Inspector noted that the local estate had 1,755 homes. There was alternative public house provision within the 2km walking distance set out in PPG13 (as the crow flies) but that not all residents had alternative provision within the 800m distance which the Government's Manual for Streets refers to as a 'walkable neighbourhood'. The Inspector ruled that the 800m distance was more akin to 'easily accessible' than the 2km distance.

5.88 The Inspector did go on to say however that if it had been proved that a public house (or other community use) would not have been viable then the issue of ease of accessibility to alternative facilities would not have been an issue. The Inspector concluded that:

> 21. The overall conclusion is that the appeal should be dismissed because, contrary to CS Policy DM2 and its supporting text, the premises have not been marketed at a realistic freehold or leasehold price for the required full 12 months to test whether they would be viable to either continue in use as a public house or to be used for another facility beneficial to the local community.

5.89 The appeal was dismissed on 07 February 2012.

### The Swan Public House (Ref 100-067-073)

5.90 This appeal concerned the change of use from a public house to a dwelling. The site is located in a village in Suffolk. The main issue was whether there is sufficient justification to go against policies that seek to support services in villages.

5.91 The Inspector noted that the public house was within walking distance of a number of dwellings, is close to the church and village shop and its loss would be detrimental to the well-being and needs of the local community. The Inspector agreed that the public house was struggling (and that the financial information supported this) but that there was no information that a change in ownership would suffer the same issues. There were also issues with how the marketing price had been arrived at. The Inspector concluded with:

> 11. In conclusion, while I have every sympathy with the appellant's predicament, loss of the public house would be at the expense of wider community interests. The evidence before me does not support a departure from the policy aims of retaining facilities that contribute to a community's vitality. No other matters raised are sufficient to override my conclusions or my decision to dismiss the appeal.

5.92 The appeal was dismissed on 09 April 2010.

### The Swan, St Albans (Ref 100-062-173)

5.93 Three appeals were made, one of which concerned demolition of a vacant public house in a Conservation Area, another sought consent for 7 terraced houses and the third a large advertisement hoarding. The public house was located in a town centre fringe area. One of the issues was harm to the community from the loss of public house.

5.94 Whilst not the only issue with the appeals, the Inspector considered that it had not been shown that the viability for alternative uses of the building such as community uses or housing had been fully explored. The Inspector did not give any significant weight to the loss of the community facility as there was plenty of other provision nearby.

5.95 All of the appeals were dismissed on 12 May 2009.

### The White Swan Inn (Ref 100-073-341)

5.96 This appeal concerned the change of use from a public house to a dwelling. The site is located in a small village in the countryside. The main issues were the viability of the public house and whether the loss of the public house would represent a socially and environmentally unsustainable form of development.

5.97 The public house had diversified to an extent in that 11 holiday chalets had been allowed in a paddock to the rear (partially implemented) and a house erected on the former garden area.

5.98 The Inspector noted that the public house had made a little profit in 2003-2005 but had effectively been running at a loss since 2006. The business had changed from 2006 onwards with the removal of a Skittles alley and focus on dining. This was coupled with a change to the opening hours and these factors deterred previous regulars. There were issues with the viability evidence and the Inspector also noted that there no evidence of concerted and varied attempts to attract new customers.

5.99 The Inspector found evidence that the public house had been an integral part of the community until the focus moved towards dining. It was considered that the public house remains as a potential community facility.

5.100 The Appeal was dismissed on 09 April 2010.

### Worthenbury Arms (Ref 100-067-165)

5.101 This appeal concerned the loss of and conversion of a public house to two residential units. The public house is located in the countryside. Planning permission had previously been granted (2005) for residential development on the car park and part conversion of the public house to residential. The latter was not implemented and the public house closed in 2007. The main issue was whether the proposal conflicts with policies designed to retain community facilities in rural areas.

5.102 Evidence was provided that demonstrated that the public house was not a viable concern prior to its closure in 2007 and that it had been marketed with no offers received between then and February 2010. The Inspector was therefore satisfied on the issues of viability and marketing.

5.103 The Inspector noted that villagers had expressed concern as regards the lack of anywhere for them to socialise and the impact of the loss on the community but the Chief Planner's evidence to the planning committee suggested that the public house was not fully supported when it had been open.

5.104 The appeal was allowed on 27 April 2010.

### Conclusions

5.105 Our main conclusions arising from the above appeal analysis are as follows:

- Indicators to an important local/community facility can include: (a) public house is home to informal groups and sports teams, (b) the public house garden area is valuable in terms of safe play space for children, (c) any other community facilities in walking distance, (d) the public house offers a quiz/is a venue for local committees and offers other social events;
- The poor operation of a public house can be a contributory factor to the poor financial return – and this could be determined using evidence from the public;

- Applicants/Appellants need to investigate proposals to increase the use of the public house business perhaps through complementary functions or diversification;
- Applicants/Appellants need to investigate whether a different business model and/or different owner/operator might result in the public house being more economically viable;
- Inspectors raised concerns regarded the marketing and asking price. For example: (a) Is the marketing strategy & price suitable to the recession? (b) Was there a signboard and did this include all necessary information and not deter any other community uses? (c) Did the appellant make approaches to local community groups and other public house/restaurant operators? (d) Did the appellant market the property for rent as well as sale? (e) Was the property marketed for at least 12 months;
- Inspectors will take account of the number of pubs versus the size of the local population – and they will also take account of the business focus of other nearby pubs (i.e. dining versus drinking) & the characteristics of other local community facilities;
- Inspectors will look at whether the alternative provision is easily accessible – and this is better reflected by the 800m 'walkable' distance than the 2km walking distance formerly set out in PPG13; and

## Recent Local Appeal Decisions

5.106 In addition to the above appeal decisions, we are now (as of September 2012) in possession of several local appeals which have prompted some changes to the IPPG. We provide a brief analysis of these appeals below.

### The Unicorn, Cherry Hinton (Ref APP/Q0505/A/11/2167572)

5.107 In the case of the Unicorn, the main issue was the effect of the loss of the public house on the provision of local community facilities in the area. In essence, the appeal was dismissed on the grounds of there being no clearly substantiated evidence that there is no longer a need for this community facility. The Inspector commented that no marketing had taken place and that this contributed to a lack of firm evidence that the premises were not of interest to any other operator.

5.108 The Inspector also stated that there was nothing against which to judge whether the pub could be developed and modernised in a way which is sustainable and retained for the benefit of the community. The appeal was dismissed on 19 June 2012.

### The Plough, Shepreth, Royston (Ref APP/W0530/A/11/2167619)

5.109 As with the Unicorn, the main issue was the effect of the proposed development on the provision of community services and facilities in the area. Crucially, whilst the last use of the premises was as a restaurant, the Inspector decided that as it was formerly a pub there must still be the potential for it to be returned to that use. This is relevant to the decision to include former pubs in the List of Safeguarded Pubs in Section 5 of the proposed IPPG. The Inspector disagreed that the premises could not support a viable business use and also considered the pub to be an important community facility within the village.

5.110 Crucially, the Inspector also discussed the marketing process at length. Though the Inspector considered that the minimum 12 month period had been adhered to, there was concern at an ambitious asking price. The appeal was dismissed on 16 May 2012.

### The Carpenters Arms, 182-186 Victoria Road (Ref APP/Q0505/A/12/2168512)

5.111 In this appeal, one of the two main issues was "whether the proposal would result in the loss of a local facility important in sustaining the social life of the community; and, if it would, whether such a facility would be viable to operate". In this appeal the Inspector decided that LP Policy 5/11 "Protection of Community Facilities" was in conflict with the NPPF in that it does not refer to public houses. The Inspector decided to treat public houses as community facilities in accordance of the NPPF for the purposes of the appeal.

5.112 The Inspector discussed the value of the pub to the community and in doing so referred to both the 400m (5 minute) and 800m (10 minute) walking distances. The Inspector concluded that the appeal proposal would result in the loss of a facility of value to the community.

5.113 With regard to marketing, the Inspector commented that there "*was no evidence that it was priced and marketed as a public house for a reasonable length of time, with an agent who specialised in the licensed trade*".

5.114 The appeal was dismissed on 09 July 2012.

## Planning Decisions Relating to Pubs Lost in Cambridge

5.115 We have also analysed the planning history for previous pub losses in Cambridge. The table below shows each public house and the reasons we have found for its closure – whether planning or otherwise.

Figure 5.1: What happened to the Pubs that Closed (As at 19/03/12)

| Public house | Planning History re: redevelopment/change of use/conversion | Owner/former Owner (if known) | When Closed (if known) | Other Reason for Closure (if known)? |
|---|---|---|---|---|
| The Zebra | None as yet | Ex Greene King | Feb 2012 | This link http://tinyurl.com/7xsnj5w states that it was sold to a developer. |
| The Carpenters Arms | 11/1066/FUL Conversion of Public House and letting rooms to residential apartments and first floor rear extension (Refused by Members - APPEAL dismissed – see 5.111 above) | Punch Taverns | August 2011 | |
| Penny Ferry | 09/1200/FUL Erection of five 4-bed houses (following demolition of former public house) (Refused - APPEAL ALLOWED) | Greene King | | |
| The Unicorn | 11/1105/FUL Partial demolition of single storey rear extension and change of use from public house to single dwellinghouse with access onto High Street (Refused and Appeal dismissed – see para 5.107 above) | Greene King | 2011 | |
| Rose And Crown | 10/1090/FUL Change of use from public house (A4) with ancillary living accommodation to 6-bed flat (1st and 2nd floors), 1-bed flat (ground floor) and Letting Agent (A2) (ground floor) and basement office (B1) (Approved) | Greene King | July 2008 | |
| The Fleur De Lys | 10/1039/FUL for Demolition of outbuildings to existing building. Refurbishment and re-use of existing building with new three storey extension to form student accommodation consisting of 12no studios and 2no 1bed self-contained units (Approved) | Ex Punch Taverns | 10 July 2010 | This public house became The Fleur Bar & Bistro in 2007 and closed its doors on 10 July 2010. |
| Queen Edith | 10/0815/FUL Erection of 8 dwellings (following demolition of existing Public House) (Refused no appeal) | Punch Taverns | 10/12/11 | http://www.cambridge-news.co.uk/Home/Public house-facing-closure-over-12000-tax-bill-09122011.htm |
| The Royal Standard | 08/0766/CL2PD Certificate of lawful use S192 for A3 use (restaurants and cafes) (Approved)<br><br>11/0872/FUL Erection of 5 houses and conversion/extension to provide student accommodation (sixteen units) (Refused no appeal)<br><br>12/0248/FUL Erection of 5 houses | Bennell Developments | Public house closed 2006 | Became a restaurant. |

| | | | | |
|---|---|---|---|---|
| | and conversion/extension to provide student accommodation (13 units) (Pending)<br><br>CAMRA proposing to submit application to turn back into public house. | | | |
| Slug And Lettuce | n/a | | Bills Café opened in June 2011 | Now a Bills Café/Restaurant/Store |
| Five Bells (143-145 High Street) | 11/0264/FUL Planning permission for the development of six terraced dwellings and associated works (Approved) | Camstead Homes | September 2010? (website said was derelict and vandalised for a year up to Sep 11). | One Councillor opposed the plans at the South Area Committee. Cllr Dryden said: *"The Five Bells was a village amenity and a great community public house. With the Unicorn boarded up, the Robin Hood more a restaurant than a public house and plans to make the Red Lion into more of a restaurant, we have lost our last real public house."* |
| Former Hat And Feathers | 10/0522/FUL Conversion and extension of former Public House for residential purpose, to accommodate 4 studio (1-bed) flats, and part demolition. Alteration and rebuild of single storey extension to form two 2-bed flats together with associated landscaping, car parking and access arrangements (Approved) | Ex Punch<br><br>50/50 Investments Ltd. | 2006? | Online Readers Comment dated 19/03/2006: *"The Hat & Feathers is now closed, boarded up, and for sale."* |
| The Jubilee | 10/0132/FUL Erection of 5 dwelling houses and two studio apartments with associated garden space (following demolition of existing 'Jubilee' public house) (Approved) | Ex-Punch<br><br>Beechwood Estates Co. (NB same address as Bennell Developments – see Royal Standard above) | Summer 2009 | closedpubs.co.uk: *"It had become run-down under Punch Taverns' ownership"* |
| Henrys | 11/1569/FUL Refurbishment of an existing bar/cafe into a restaurant including replacing 3 windows & adjust the entrance position, the removal of a brick wall to allow the entrance to be rotated by 90 degrees to improve visibility and access (Approved) | Ex Scottish & Newcastle(?)<br><br>Application by Las Iguanas | ? | Now a restaurant. |

| | | | | |
|---|---|---|---|---|
| Cow And Calf | C/00/0311 Erection of 6 dwellings (2 houses, 2 studios - basement/ ground floor; 2 maisonettes - first/second floors) together with underground car parking, cycle and refuse storage. (Approved)<br><br>C/02/1079 Erection of 3No. houses and 3No. Flats/Maisonettes. (Approved) | Beauville Properties | 2000? | http://www.cambridge-camra.org.uk/ale/300/cow-calf.html states that it was sold by Council. |
| Blackamoors Head | Recent online applications suggest changed into a restaurant. | Ex-Pubmaster | 2005 | Online Reader's comment dated 24/09/2005: "*The Blackamoors Head has recently closed, and a Backstreet Bistro has opened in its place.*" |
| The Haymakers | n/a | Punch Taverns | July 2011 | Landlord states here http://www.cambridge-news.co.uk/Home/Cambridge-public house-to-close-its-doors-13072011.htm that was due to: "*The reasons for that are a lack of business, incredibly high business rates and rent which is unmanageable set by Punch Taverns.*"<br><br>Public house is the Hub Candidate. |
| The Ancient Druids, Napier Street | Changed to a Restaurant | Ex-Charles Wells | 2008? | "*The Ancient Druids was situated on Napier Street. This was the intended replacement for an earlier public house of the same name situated at 34 Fitzroy Street. However, due to its position by a rear service area of the Grafton Shopping Centre, it eventually failed. It is now a Chinese restaurant.*" (Closedpubs.co.uk) |
| Five Bells (126 - 128 Newmarket Road) | | Ex Greene King. Currently boarded up and owned by "DAP Cambridge Ltd" (a car supply business). | Closed in 2010, possibly earlier | The public house is used for storage with no plans to change. |
| The Greyhound | 11/1051/CLUED Application for a Certificate of Lawfulness under section 191 for use of building for either A1, A2, A3 or A4 use (Approved) | Ex-Wellington Inns<br><br>Essex County Council Pension Fund | 2008 | Online reviews suggest a badly run/run down public house.<br><br>Lambert Smith Hampton |

| | | | | |
|---|---|---|---|---|
| | 12/0255/FUL - Demolition and erection of B1/B2 /B8 use (Pending) | | | advertising site in December 2011 for retail. |
| The Grove | Article on the web dated 22/12/11 – *"The city's Sikh Society, which is looking for a permanent meeting place in Cambridge for its members, is hoping to turn a former public house into a community centre."* | Greene King | 08/09/2011 | Owners Greene King closed The Grove after discussions with Cambridgeshire police's licensing team. |
| The Rosemary Branch | 11/1042/FUL - development of 8 houses and 3 flats following demolition of public house (Withdrawn) | Ex Punch Taverns<br><br>Campbell Properties Ltd | Most recent review on Beer intheEvenin g.com was dated 27/10/11 | Web comment - A spokeswoman for Punch Taverns said the brewery sold the property to a developer on March 18 2011 |
| The Locomotive | Now a restaurant. | | Between mid 2008 and late 2009 | Closed in mid 2008 following Drugs Raid. Review on beerintheevening.com dated 29/11/09 states is now a restaurant |
| The Golden Pheasant | Became a restaurant.<br>12/0086/FUL - Proposed residential development (11 dwellings) and retail unit (2 bed flat) at<br>169 - 173 High Street (Pending) | Ex Whitbread | | Sold in 1999 by Whitbreads and became the "Saigon City Restaurant". |
| Seven Stars | 12/0233/FUL - Change of use from public house and extension to form 5 no. flats (Pending) | Greene King | Open as of 07/03/2012 | |

5.116 Using a few general assumptions, we can take the following data from the above table:

- There are a total of 24 pubs listed;
- 5 pubs 'closed' because they became restaurants;
- 1 public house became a restaurant and then an application for housing[19] was lodged;
- 6 pubs had applications for housing approved;
- 7 pubs currently have applications/appeals pending (or have had refusals for) housing;

[19] Housing includes Student Accommodation and mixed use development that include flats.

- Of the 6 pubs previously or currently owned by Greene King (that we have been able to confirm), 3 have seen applications for housing with 1 approved. 3 pubs simply closed;
- Of the 4 pubs previously or currently owned by Punch Taverns (that we have been able to confirm), 3 have seen applications for housing with 1 approved; and
- Aside from Bennell Developments Ltd and Beechwood Estates Co (who share the same address, could be the same company and have each submitted one application for housing), there is no evidence that applications are being submitted by the same developer or that a developer is buying up pubs as an investment opportunity.

5.117 There are no obvious trends from the above aside from 13 of the 25 being subject to applications for housing. Whilst a number of pubs did 'close' because they became restaurants, only one has since been subject to an application for housing.

5.118 The Penny Ferry Public house was subject to an application for "Erection of five 4-bed houses (following demolition of former public house)". This was refused by the Planning Committee. None of the refusal reasons related to the loss of the public house. A subsequent appeal was recently allowed (14 March 2012). We have reviewed the Inspectors decision and note that paragraphs 5 – 6 deal with the principle of development. The Inspector made no mention of the loss of the public house and its community function (however, this is perhaps not surprising as this was not an issue raised by the Council in either the decision notice or appeal statement).

# 6. Policy Options & Recommendations

## Market Summary

6.1 Pubs are a vital part of sustainable communities, providing a place for social interaction to help bind communities together and providing an important part of the economy in attracting tourists, students, young workers and entrepreneurs to the city.

6.2 There is no doubt that the public house sector has been facing unprecedented pressure in recent years. The smoking ban, beer tax accelerator, discounted supermarket alcohol, changing consumer tastes, and disproportionately high unemployment in the core young adult market have brought severe challenges to the industry.

6.3 Cambridge has not been immune from these national trends with more than 20 pubs closing over the last few years. However, the sector is still strong, and where certain pubs with the right characteristics and location have been taken over by new independent operators or invested in by major national managed pub companies or regional brewers they have turned around their business and are thriving. In particular, there has been a drive across the industry to increase the proportion of income derived from food sales to substitute for declining beer sales by tapping into other markets.

6.4 With one of the top universities in the world, expanding research and science parks, and an attractive historic city centre for tourists, it is one of most prosperous cities in the UK. This puts pressure on a housing supply restricted by the Green Belt that surrounds the city. In many cases, therefore, the value of a public house site for residential purposes can be greater than its value as a viable pub business. This is especially the case for larger sites with car parks and pub gardens – the same pubs best able to adapt to the smoking ban and changing trends towards food.

6.5 Bringing together a planning policy to help the Council deal with these competing forces is no easy task, however, there are a number of potential policy approaches to the issue of pub closures in Cambridge.

# Policy Options

## A Market-Led Approach

6.6 One option would be to leave things as they are to market forces, with little or no policy to guide applications for the change of use or redevelopment of pub sites.

6.7 This could potentially allow the market to dictate the correct supply of pubs to serve local market demand in Cambridge. The closure of failing or underperforming pubs would allow other pubs to benefit from increased custom and thereby enhance their trading and performance.

6.8 However, this policy option assumes a perfect market, and due to other existing policy, most notably the Green Belt, and the success of the local economy, Cambridge has an imperfect housing market. If one were to leave the pub sector to the market, then one would also need to remove any other constraints and leave housing development to the market. One would also have to remove all residential amenity policies, licensing and environmental health regulations that make it so difficult to open up a new pub in residential areas.

6.9 Moreover, this approach would not accord with national planning policy which requires local authorities to guard against the loss of valued local community facilities including pubs and ensure that they are retained for the benefit of the community.

## A Protective Approach

6.10 An alternative approach would be to have an effective moratorium to prevent any further pub closures.

6.11 However, planning policy cannot stop a pub from being closed if the business fails. Neither, can planning controls prevent pubs from converting to restaurants as a change of use from a use class A4 pub to class A3 restaurant, A2 professional services office, or A1 shop, are all permitted development allowed by the Use Classes Order.

6.12 Moreover, this approach would also be against national planning policy which advises councils that their local planning policies must be flexible enough to allow rapid response to changes in economic circumstances and ensure that they are able to modernise in a way that is sustainable.

## A Flexible Approach

6.13 A third alternative, therefore, would be to develop a policy response which is flexible in allowing pubs to change use to other 'A' class uses – shops, professional services, restaurants or take-aways, and in turn for such uses to change back to pub use where there is a market. This provides flexibility for those pubs which are struggling to change to alternative business uses while retaining the vibrancy and use of the site as a local commercial community facility which could be returned to pub use in the future if there were a change in the market.

6.14 For those sites for which there is no longer a viable alternative ‘A’ class use, policy could be flexible to provide the site owner with guidance on the detailed information that would be required by the council in order to demonstrate that actively marketing the site to pub, other community facilities and other ‘A’ use class operators has not resulted in any market interest over a certain period, and that no viable local business can be developed in the site.

6.15 To provide protection for the community need that pubs serve, a policy could be formulated which resists the loss of pubs that serve a local market of at least 750 working age adults, but more flexible to those serving a smaller catchment.

6.16 Policy could also provided added protection for clusters of pubs considered important for the functioning of the local economy.

## Recommendations

### Public House Policy

6.17 We would recommend a flexible policy that allows for the change of use of public houses within the ‘A’ use class and provides criteria for the consideration of the redevelopment of such sites to a non-A class use where they may no longer be viable as a commercial community facility. We consider that this is the only policy approach that we believe can address national planning policy and the permitted development rights of pub owners to change use within the Use Classes Order.

### Retail Policy

6.18 In parallel with a specific policy for public house sites we would recommend that an additional retail policy be fed into the Local Plan Review to provide protection for A2, A3, A4, and A5 use classes within defined primary and secondary shopping frontages of the City Centre and within District and Local Centres. Currently, there is policy (6/6 and 6/7) to control the change of use of A1 premises. However, there is no policy to control the loss of other A use classes to non-A uses.

6.19 Modern shopping areas include a range of retail premises across the ‘A’ classes and this adds to their interest and diversity. This vitality will be adversely affected over time if there is no policy to prevent residential development on non-A1 uses (including A4 pubs and A3 restaurants) within shopping areas.

## Urban Extensions

6.20 The current Local Plan is under review and should strategic sites for new housing development come forward in the next plan period, there could be opportunities to provide public houses to satisfy local demand and create vibrant and sustainable communities.

6.21 In this context we would not suggest a ratio of one pub per 750 working age adults as used in the rest of this report. That average is derived from much smaller pubs than an operator would seek to develop today. We would therefore suggest consideration of one pub/pub-restaurant per 2,000 – 3,000 new households, co-located with other commercial, retail and community facilities including recreational and amenity open space, on prominent sites with good visibility on the main arterial transport route into and out of the new community.

## Area's of Restructuring and Redevelopment

6.22 Newmarket Road is an area undergoing particular transition in which a former Victorian shopping parade has been severed in two by a railed dual carriageway and left behind by a largely car bourn new retail park. Two pubs, the Rose & Crown and Five Bells have already closed in this area and turned into alternative business uses. An application has been submitted to redevelop a third, the Seven Stars, for residential.

6.23 Cambridge City Council has prepared the Eastern Gate Development Framework Supplementary Planning Document (SPD) to address the widespread recognition of the need to improve the physical environment around Newmarket Road.

6.24 We are aware of national and regional pub operators seeking sites for new pubs in prominent sites, on major arterial routes, fronting retail or leisure parks. Therefore, it may be that agreement could be reached with the owners of older pubs which are struggling in locations of major change for redevelopment in return for the provision of a replacement public house (pub-restaurant) nearby.

Report

# Appendices

Report

# Appendix A

## Audit Questionnaire

| | |
|---|---|
| **ID** | |
| **Pub Name** | |
| **Address** | |
| **Postcode** | |

| MANAGEMENT | |
|---|---|
| Brewery/ Pub Co | |
| Free House | |
| Freeholder | |
| Tenant | |
| Manager | |

| FOOD OFFER | |
|---|---|
| Snack Food | |
| Pub Food | |
| Gastro/Fine | |

| INVESTMENT POTENTIAL | |
|---|---|
| Function Room | |
| B&B | |
| Conservatory | |
| Beer Garden | |
| Play Equipment | |
| Live music, Stand-up | |

| ENTERTAINMENT | |
|---|---|
| TV | |
| Sky | |
| Pool Table | |
| Fruit Machine | |
| Quiz Machine | |
| Dart Board | |
| Duke/ Music Box | |
| Separate Sports/TV Room | |

| MAINTAINED STANDARD | |
|---|---|
| Poor | |
| Average | |
| Good | |

| COMMUNITY OFFER | |
|---|---|
| Pub Team(s) | |
| Pub Events (e.g. Quiz) | |
| Meeting Place (e.g. societies) | |

| PUB TYPE | |
|---|---|
| Suburban Community Local | |
| Edge of Centre Community | |
| City Tavern | |
| City Bar | |
| Pub-Restaurant | |
| Restaurant | |
| Other (describe) | |

| DRINKS OFFER | |
|---|---|
| Cask Ale | |

| ACCESSIBILITY | |
|---|---|
| Parking Spaces | |
| Bus Stop | |
| Train Station | |
| Cycle Spaces / Room for? | |
| Disabled Access | |
| Disabled Toilets | |

| FACILITIES | | | | |
|---|---|---|---|---|
| Garden | | Seating | | |
| | | Hard Surfaced | | |
| | | Quality | Good | |
| | | | Average | |
| | | | Poor | |
| | | Space for Play | | |
| | | Play Equipment | | |
| Yard | | Seating | | |
| Smoking Area | | Seating | | |
| | | Covered | | |
| | | Heaters | | |
| | | Patio | | |
| | | Ash trays | | |
| Separate Restaurant | | | | |
| Bar Area | | | | |
| Function Rooms | | | | |
| Manager's Accommodation | | | | |
| Letting Rooms | | | | |

| SURROUNDING USES | |
|---|---|
| Adjacent Property Type | |
| Residential Properties within 50 m | |
| Public House within 400 m | |

| SURROUNDING DEVELOPMENT | |
|---|---|
| Planned development within 400 m | |

| PHOTOGRAPHS | | | |
|---|---|---|---|
| FRONT | INSIDE | YARD/GARDEN | CAR PARK |
| | | | |

| OTHER COMMENTS |
|---|
| |

Report

# Appendix B

## Audit Spreadsheet

| IDENTIFICATION | | | | POPULATION | | MANAGEMENT | PUB TYPE* | | | | | | FOOD OFFER* | | | FACILITIES | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | Wider Catchment | Catchment | | | | | | | | | | | Garden/Yard | | Smoking | | | | |
| ID | Pub Name | Address | Open / Closed | All ED pop 16-64 year old within 400m | Centre Pt pop 16-64 year old within 400m | Brewery/Pub Co | Suburban Community Local | Edge of City Community | City Tavern | City Bar | Pub-Restaurant | Restaurant | Snack Food | Pub Food | Gastro/Fine | Garden | Yard | Smoking Area | Bar Area | Separate Restaurant | Function Room | Letting Rooms |
| 1 | Bath House, The | 3 Benedict Street | Open | 9,041 | 1,503 | √ Greene King | | | √ | | | | | √ | | | over canal | √ | √ | | | |
| 2 | Mill, The | 14 Mill Lane | but | 8,124 | 2,401 | University, leased | | | √ | | | | √ | | | | | | | | | |
| 3 | Maypole, The | 20A Portugal Place | Open | 7,103 | 2,660 | Freehouse | | √ | | | | | | √ | | | √ | √ | √ | | √ | |
| 4 | Unicorn, The | 22 Church Lane | Open | 1,394 | 108 | Enterprise | | | √ | | | | | √ | | √ | √ | √ | | √ | | √ |
| 5 | Baroosh | 8 Market Passage | Open | 8,727 | 1,974 | √ | | | | √ | | | | √ | | | | √ | √ | | √ | |
| 6 | County Arms, The | 43 Castle Street | Open | 6,855 | 2,906 | √ Everards | | √ | | | | | | √ | | | √ | √ | √ | | | |
| 7 | Castle Inn, The | 36-38 Castle Street | Open | 6,855 | 3,144 | Adnams Ale | | √ | | | | | | √ | | | √ | √ | √ | | | |
| 8 | St Radegund | 129 King Street | Open | 6,502 | 1,617 | Freehouse | | √ | | | | | | | | | | √ | √ | | | |
| 9 | Emperor, The | 21 Hills Road | Open | 5,923 | 1,656 | Enterprise | | √ | | | | | | √ | | | √ | √ | √ | | √ | |
| 10 | Earl of Derby | 129 Hills Road | Open | 1,607 | population | √ Greene King | | | √ | | | | | √ | | | √ | √ | √ | | | √ |
| 11 | Prince Regent | 19 Regent Street | Open | 4,441 | 1,448 | √ Greene King | | | √ | | | | | √ | | | √ | √ | √ | | | |
| 12 | Fountain Inn, The | 12 Regent Street | Refurbished) | 6,013 | 2,088 | Company | | | | √ | | | | | √ | | | | √ | | | |
| 13 | Baron of Beef, The | 19 Bridge Street | Open | 6,656 | 2,660 | √ Greene King | | √ | | | | | | √ | | | | √ | √ | | | |
| 14 | Snug, The | 67 Lensfield Road | Open | 3,999 | 314 | Enterprise | | | | √ | | | | √ | | | | √ | √ | | | |
| 15 | Red Bull, The | 11 Barton Road | Open | 5,646 | 1,089 | Enterprise | √ | | | | | | | √ | | | √ | √ | √ | | | |
| 16 | Thames | 68 King Street | Open | 5,853 | 2,935 | √ Greene King | | √ | | | | | | | | | √ | √ | √ | | | |
| 17 | King Street Run, The | 88 King Street | Open | 6,032 | 3,120 | Enterprise | | √ | | | | | √ | | | | | √ | √ | | | |
| 18 | Six Bells | 11 Covent Garden | Open | 4,943 | 2,937 | √ Greene King | √ | | | | | | | √ | | | √ | √ | √ | | | |
| 19 | Flying Pig, The | 106 Hills Road | Open | 3,765 | 1,285 | Punch | | √ | | | | | | √ | | | √ | √ | √ | | | |
| 20 | Osbourne Arms, The | 108 Hills Road | Open | 3,158 | 1,285 | Pubmaster | | √ | | | | | √ | | | | √ | | √ | | | |
| 21 | All Bar One | 36 St Andrews Street | Open | 6,823 | 2,262 | Butler | | | √ | | | | | √ | | | | | √ | | | |
| 22 | Burleigh Arms, | 9-11 Newmarket Road | Open | 4,357 | 1,739 | √ Charles Wells | | √ | | | | | | √ | | √ | √ | √ | √ | bar/restaura | | |
| 23 | Bakers, The | 176 East Road | Open | 4,851 | 2,793 | √Greene King | | √ | | | | | | √ | | √ | | √ | | | | |
| 24 | Snug, The | 170 East Road | Open | 5,070 | 2,391 | 2 in Cambridge) | | √ | | | | | | √ | | | √ | √ | | | | |
| 25 | Dobblers Inn, The | 184 Sturton Street | Open | 3,999 | 2,417 | √ Charles Wells | √ | | | | | | | | | | √ | √ | √ | | | |
| 26 | Earl of Beaconsfield | 133 Mill Road | Open | 6,216 | 3,424 | Punch | √ | | | | | | √ | | | | √ | √ | √ | | | |
| 27 | Corner House | 231 Newmarket Road | Open | 2,734 | 1,406 | √ Greene King | √ | | | | | | | √ | | | √ | √ | √ | | | |
| 28 | Boathouse, The | 14 Chesterton Road | Open | 6,223 | 2,023 | √ Greene King | | | √ | | | | | √ | | √ | √ | √ | √ | | √ | |
| 29 | Green Dragon | 5 Water Street | Open | 3,390 | 1,339 | √ Greene King | √ | | | | | | | √ | | √ | | √ | √ | | | |
| 30 | First & Last, The | 18 Melbourne Place | Open | 6,367 | 2,242 | √ Greene King | | | | | √ | | | | √ | | √ | √ | √ | √sep rooms | | |
| 31 | Empress, The | 72 Thoday Street | Open | 5,615 | 3,470 | Freehouse | | √ | | | | | | √ | | | √ | √ | √ | | | |
| 32 | Portland Arms, The | 129 Chesterton Road | Open | 3,940 | 1,668 | √ Greene King | √ | | | | | | | √ | | √ | √ | √ | √ | | | √ |
| 33 | Tivoli, The | 16 Chesterton Road | Open | 6,223 | 2,023 | √ Weatherspoons | | | √ | | | | | √ | | | | | √ | | | |
| 34 | Live and Let Live | 40 Mawson Road | Open | 4,428 | 2,630 | Freehouse | | √ | | | | | √ | | | | | | | | | |
| 35 | Wrestlers, The | 337 Newmarket Road | Open | 2,672 | 865 | Charles Wells | √ | | | | | | | Thai | | | | √ | | | | |
| 36 | Bird, The | 73 Newmarket Road | Open | 4,380 | 1,793 | √ Greene King | | √ | | | | | | | | | | | | | | |
| 37 | Robin Hood | 1 Fulbourn Road | Open | 2,305 | 998 | (Eating Inns) | | | | | √ | | | √ | | √ | √ | √ | √ | √ | | |
| 38 | Cow, The | Corn Exchange Street | Open | 8,420 | 3,200 | Orchid Inns | | | | | √ | | | √ | | | | √ | √ | | | |
| 39 | Sir Isaac Newton | 84 Castle Street | Open | 6,643 | 2,314 | Greene King | | √ | | | | | | √ | | √ | | √ | √ | | | √ |
| 40 | Rock, The | 200 Cherry Hinton Road | Open | 4,236 | 1,626 | √ Greene King | √ | | | | | | | √ | | | √ | √ | √ | | | |
| 41 | Rosemary Branch, The | 503 Coldhams Lane | Closed | 899 | 215 | ex-Punch | √ | | | | | | | | | √ | | √ | | | | |
| 42 | White Swan, The | 109 Mill Road | Open | 6,400 | 3,128 | √ Greene King | √ | | | | | | | √ | | √ | √ | √ | √ | | | |
| 43 | Milton Arms, The | 205 Milton Road | Open | 3,476 | 1,698 | (Hungry Horse) | √ | | | | | | | √ | | √ | | √ | √ | | | |
| 44 | Hopbine | 11-12 Fair Street | Open | 5,342 | 1,805 | Freehouse | | √ | | | | | | √ | | x | x | x | | | | |
| 45 | Old Spring, The | 1 Ferry Path | Open | 4,525 | 1,520 | Green King | | | | | √ | | | | √ | √ (Terrace) | √ | √ | √ | | | |
| 46 | Jenny Wren, The | 80 Campkin Road | Open | 3,545 | 1,997 | √ Greene King | √ | | | | | | | √ | | | √ | √ | √ | | ? | |
| 47 | Eagle, The | Benedict Street | Open | 8,443 | 1,503 | √ Greene King | | | √ | | | | | √ | | | √ | √ | √ | Sort Of | | |
| 48 | Castle, The | 37 St Andrews Streets | Open | 4,557 | 2,262 | Greene King | | | | | √ | | | | √ | | | | √ | | | √ |
| 49 | Carlton Arms, The | Carlton Way | Open | 3,687 | 1,796 | Enterprise | √ | | | | | | | √ | | √ | | √ | √ | | | |
| 50 | Jolly Scholar, The | 1 King Street | Open | 9,284 | 2,572 | Punch | | | | √ | | | | | √ | | | √ | √ | √ | √ | |
| 51 | Green Man, The | 55 High Street | Open | 1,133 | 293 | Mitchell & Butlers | | | | | √ | | | | √ | √ | | | √ | | √ | |
| 52 | Regal, The | 38-39 St Andrews Street | Open | 4,736 | 2,262 | (Wetherspoons) | | | √ | | | | | √ | | | √ | √ | √ | √ | | |
| 53 | Geldart, The | 1 Ainsworth Street | Open | 4,254 | 2,618 | √ Punch Taverns | √ | | | | | | | | √ | | √ | √ | √ | | | |
| 54 | Med, The | Perne Road | Open | 3,884 | 1,300 | Enterprise | | | | | √ | | | | √ | | √ | √ | √ | √ | √ | |
| 55 | Devonshire Arms | 1 Devonshire Road | Open | 6,045 | 2,666 | Milton Brewery | | √ | | | | | | | | | √ | √ | √ | | 2 x bars | |
| 56 | Cambridge Blue, The | 85-87 Gwydir Street | for refurb) | 5,736 | 2,366 | Freehouse | | √ | | | | | | √ | | | | | | | | |
| 57 | Kingston Arms | 33 Kingston Street | Open | 6,254 | 3,017 | Freehouse | | √ | | | | | | | √ | | √ | √ | √ | | | |
| 58 | Anchor, The | Silver Street | Open | 8,124 | 2,401 | √ Greene King | | | √ | | | | | √ | | | √ | √ | √ | | | |
| 59 | Great Northern, The | 1-3 Station Road | Open | 3,527 | 1,552 | Punch | | | | √ | | | | √ | | | √ | | | | √ | |
| 60 | Tram Depot The | 5 Dover Street | Open | 4,854 | 2,753 | Everards | | | √ | | | | | | | | | | | | | |
| 61 | Fort St George | Victoria Avenue | Open | 3,938 | 1,524 | √ Greene King | | | √ | | | | | √ | | √ | √ | √ | √ | √ | | |
| 62 | Alexandra Arms, The | 22-24 Gwydir Street | Open | 4,885 | 2,760 | √ Greene King | √ | | | | | | | √ | | | √ | √ | √ | | | |

| IDENTIFICATION | | | | POPULATION | | MANAGEMENT | PUB TYPE* | | | | | | FOOD OFFER* | | | FACILITIES | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | Wider Catchment | Catchment | | | | | | | | | | | Garden/Yard | | Smoking | | | | |
| ID | Pub Name | Address | Open / Closed | All ED pop 16-64 year old within 400m | Centre Pt pop 16-64 year old within 400m | Brewery/Pub Co | Suburban Community Local | Edge of City Community | City Tavern | City Bar | Pub-Restaurant | Restaurant | Snack Food | Pub Food | Gastro/Fine | Garden | Yard | Smoking Area | Bar Area | Separate Restaurant | Function Room | Letting Rooms |
| 63 | Seven Stars, The | 249 Newmarket Road | Open | 2,386 | 922 | √ Greene King | √ | | | | | | | | | √ | | √ | √ | | | |
| 64 | Punter, The | 3 Pound Hill | Open | 4,810 | 2,242 | Enterprise | | | | | √ | | | | √ | | √ | √ | √ | | √ | |
| 65 | Avery, The | 69-73 Regent Street | Open | 5,259 | 1,255 | √ Greene King | | | √ | | | | | √ | | | | | √ | | | |
| 66 | Mitre, The | 17-18 Bridge Street | Open | 6,656 | 2,660 | (Mitchells & Butler) | | √ | | | | | | √ | | | √ | √ | √ | | | |
| 67 | Travellers Rest | Huntington Road | Open | 1,335 | 201 | (Beefeater) | | | | | √ | | | √ | | | | | | | | |
| 68 | Red Lion | 20 Mill End Road | Open | 3,159 | 1,020 | √ Greene King | | | √ | | | | | √ | | √ | √ | √ | √ | | √ | |
| 69 | Elm Tree, The | Orchard Street | Open | 6,187 | 2,242 | Banks & Taylors?) | | √ | | | | | | | | | √ | √ | | | | x |
| 70 | Salisbury Arms, The | 76 Tenison Road | Open | 4,376 | 3,080 | √ Charles Wells | √ | | | | | | | √ | | | | √ | | | | |
| 71 | Clarendon Arms | 35-36 Clarendon Street | Open | 7,018 | 1,633 | Greene King | | √ | | | | | | √ | | | √ | √ | √ | | | |
| 72 | Waterman, The | 32 Chesterton Road | Open | 4,376 | 1,668 | Punch | √ | | | | | | | √ | √ | | √ | √ | √ | | | √ |
| 73 | Tally Ho, The | 77 High Street | Open | 1,771 | 433 | Greene King | √ | | | | | | | √ | | √ | | √ | | | | |
| 74 | Ship, The | Northfield Avenue | Open | 3,419 | 2,066 | √ Charles Wells | √ | | | | | | | √ | | √ | | √ | | | | |
| 75 | Grapes, The | 19 Histon Road | Open | 6,460 | 3,110 | Greene King | √ | | | | | | | √ | | | √ | √ | √ | | | |
| 76 | Golden Hind, The | 355 Milton Road | Open | 2,786 | 1,186 | Spirit | | | | | √ | | | √ | | | √ | √ | √ | | | |
| 77 | Granta, The | 14 Newnham Terrace | Open | 5,771 | 1,164 | Greene King | | | √ | | | | | √ | | | √ | √ | | | | |
| 78 | Pickerill Inn, The | 30 Magdalene Street | Open | 5,187 | 3,877 | Spirit | | | √ | | | | | √ | | | √ | | √ | | | |
| 79 | Panton Arms | 43 Panton Street | Open | 4,085 | 1,562 | Greene King | | √ | | | | | | √ | | | √ | √ | √ | | √ | |
| 80 | Alma, The | 26 Russell Court | Open | 4,277 | 1,562 | Greene King | | √ | | | | | | √ | | | √ | | √ | | √ | |
| 81 | Brook, The | 25 Brookfields | Open | 3,349 | 1,439 | Greene King | √ | | | | | | | √ | | √ | √ | √ | √ | | | |
| 82 | Ranch, The | 100 Histon Road | Open | 5,258 | 2,898 | Enterprise | √ | | | | | | | √ | | √ | | √ | √ | | √ | √ |
| 83 | Free Press, The | 7 Prospect Row | Open | 4,393 | 2,581 | Greene King | | √ | | | | | | √ | | √ | √ | √ | √ | | | |
| 84 | Man on the Moon | 2 Norfolk Street | Open | 4,910 | 3,112 | Pubmaster | | √ | | | | | | | | | | √ | √ | | Music) | |
| 85 | Revolution | 3-8 Downing Street | Open | 6,823 | 2,262 | Inventive Leisure | | | | √ | | | | √ | | | | | | | | |
| 86 | Zebra | 80 Maids Causeway | Closed | 4,676 | 1,633 | ex-Greene King | √ | | | | | | | √ | | | √ | √ | | | | |
| 87 | Carpenters Arms, The | 182 Victoria Road | Closed | 4,968 | 2,612 | Punch | | √ | | | | | | √ | | √ | √ | | | | | |
| 88 | Penny Ferry, The | 110 Water Street | Closed | | | √ Greene King | | | √ | | | | | | | √ | | | | | | |
| 89 | Unicorn, The | 15 High Street | Closed | 3,159 | 1,199 | √ Greene King | | √ | | | | | | | | | √ | √ | √ | | | |
| 90 | Fleur de Lys | 73 Humberstone Road | Closed | 3,654 | 1,656 | Punch) | √ | | | | | | | | | | | | | | | |
| 91 | Royal Standard, The | 292 Mill Road | Closed | 5,517 | 2,985 | Pubmaster | √ | | | | | | | | | √ | | | | | | |
| 92 | Slug & Lettuce | 34-35 Green Street | Closed | 8,727 | 1,974 | Group | | | | √ | | | | | | | | | | | | |
| 93 | d'Arry's Cookhouse | 2-4 King Street | Open | 9,284 | 2,572 | 5 pubs) | | | | | √ | | | | √ | | | | | | | |
| 94 | Japas | 9 Saxon Street | Open (rest) | 3,999 | 921 | Greene King | | | | | | √ | | | √ | | | | | | | |
| 95 | Haymakers, The | 54 High Street, Chesterton | Closed | 2,793 | 1,439 | Punch | √ | | | | | | | √ | | √ | | √ | √ | √ | √ | |
| 96 | Queen Edith, The | Wulfstan Way | Closed | 2,662 | 912 | Ltd (ex Punch) | √ | | | | | | | | | | √ | √ | √ | | | |
| 97 | Golden Pheasant | 169 High Street Chesterton | Closed | 3,532 | 1,318 | ex-Whitbread | | | | | | √ | | √ | | | | | | | | |
| 98 | Greyhound, The | 93 Coldhams Lane | Closed | 1,830 | 866 | ex-Wellington Inns | √ | | | | | | | √ | | | | | | | | |
| 99 | The Grove | Arbury Court | Closed | 3,113 | 1,607 | Greene King | √ | | | | | | | √ | | | | | | | | |
| 101 | St Johns Chop House | 21-24 Northampton Street | Open | 4,810 | 2,242 | Cambs Cuisine | | | | | √ | | | | √ | | √ | | | √ | | |
| 102 | Feathers | 35 Barton Road | Closed | | | Punch | √ | | | | | | | | | | | | | | | |
| 103 | Jubilee | 73 Catharine Street | Closed | | | Pubmaster | √ | | | | | | | | | | | | | | | |
| 104 | Henry's | Quayside | Closed | 5,427 | 3,877 | Konicis | | | | √ | | | | | | | | | | | | |
| 105 | Cow & Calf | Pound Hill | Closed | | | Freehouse | √ | | | | | | | | | | | | | | | |
| 106 | Meghana | 205 Victoria Road | Open (rest) | 7,328 | 3,103 | ex-Pubmaster | | | | | | √ | | | √ | | | | | | | |
| 107 | Restaurant & Bar | Napier Street, | Open (rest) | 5,003 | 2,269 | Charles Wells | | | | | | √ | | | | | | | | | | |
| 108 | Rose & Crown | 110 Newmarket Road, | Closed | 3,130 | 2,086 | ex-Greene King | | √ | | | | | | | | | | | | | | |
| 109 | Five Bells | 126-128 Newmarket Road | Closed | 3,292 | 1,946 | Tolly Cobbold | | √ | | | | | | | | | √ | | | | | |
| 111 | Duke of Argyle, The | 90 Argyle Street | Closed | | | ex-Punbmaster | √ | | | | | | | | | | | | | | | |
| 112 | Five Bells | 143 High Street | Closed | | | Unknown | √ | | | | | | | | | | | | | | | |
| 113 | Old Orleans | Mill Lane | Closed | | | Regent Inns | | | | √ | | | | | | | | | | | | |

* see definition on next worksheet

**Definitions**

**Pub Type**
Suburban/Village Community Local
 - (local pubs situated within residential areas with a high proportion of regular local trade, usually with pub games and simple entertainment, often with a food offering)

Edge of Centre Community
 - (pubs situated in residential areas outside but close to the town centre, possibly within a cluster of niche real ale or live venue pubs, often on an 'alternative' circuit attracting residents and students from the whole city, as

City/Village Tavern
 - (Situated in village/city centres. Looks like a pub inside and out, lots of wood, serves ale. Customers include tourists, shoppers, office workers during the day with lunchtime food and could be on the “circuit” for younger trade in the evenings, or could still be food led in evening/weekends for city wide residents and their

City Bar
 - (Situated in town/city centres. Doesn't have pub feel, unlikely to serve ales, less attractive to day-time tourists. Trendy, young trade with emphasis on loud piped music. Customers include shoppers, office workers during the day and early evening with lunchtime food and often on the “circuit” for younger trade in the later

Pub-Restaurant
 - (Basically a restaurant dressed as a pub, where the emphasis is on food, but where you order from the bar and where you can still purchase a drink from the bar and take it to your table - e.g. Harvester, Beefeater,

Restaurant
 - (No longer a pub. You have to wait to be seated and cannot buy drinks from the bar - even if there is one

Other
 - (doesn't easily fit within any of above? Describe and number below for reclassification later)

**Food Offer**

Bar Snacks - Crisps, Nuts, Bread Roll or Sandwich, Cheesy Chips, Tapas
Pub Food - Fish & Chips, Scampi & Chips, Pie & Chips, Sausage & Mash, Lansagne, Pizza at or less than
Gastro/Fine - Steak & Hand Cut Chips, Butternut Squash Risotto, Extravagant Salads, Pork Belly, etc all

**Facilties**
Bar Area - you can go up to the bar and buy a drink
Restaurant - the building is still a pub with a bar area, but it has a separate room (or part of the pub) in which

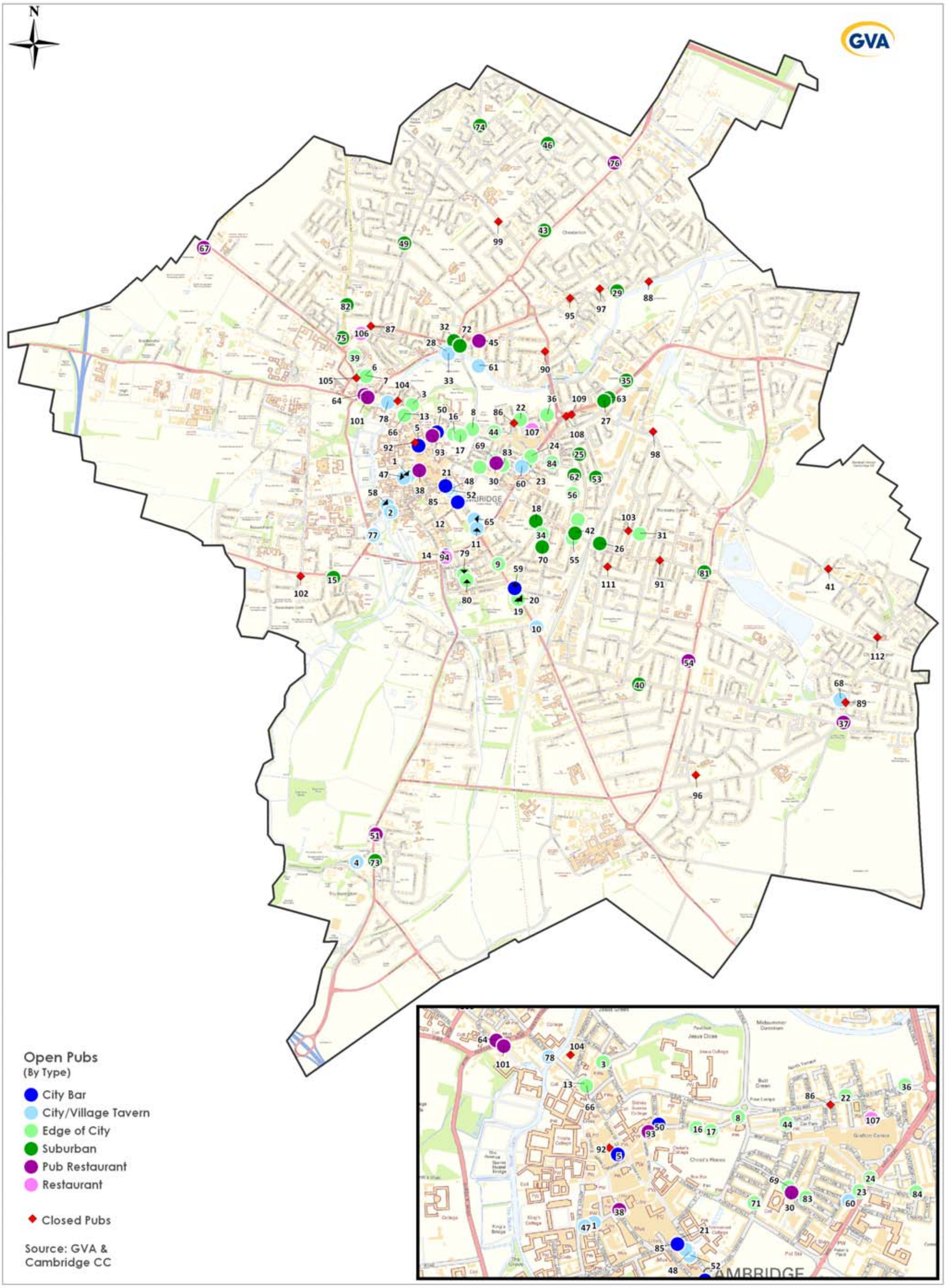
**Investment Potential**
Is there underused space room within the pub, or space for extensions outside, for the servcies mentioned
For live music/comedy/theatre, is there both space, AND, no adjoining residential neighbours

**Accessibility**
With regard to cycling, is there somewhere within sight of the pub to lock up your bike - eg cycle stands,

Report

# Appendix C

## Pubs by Type

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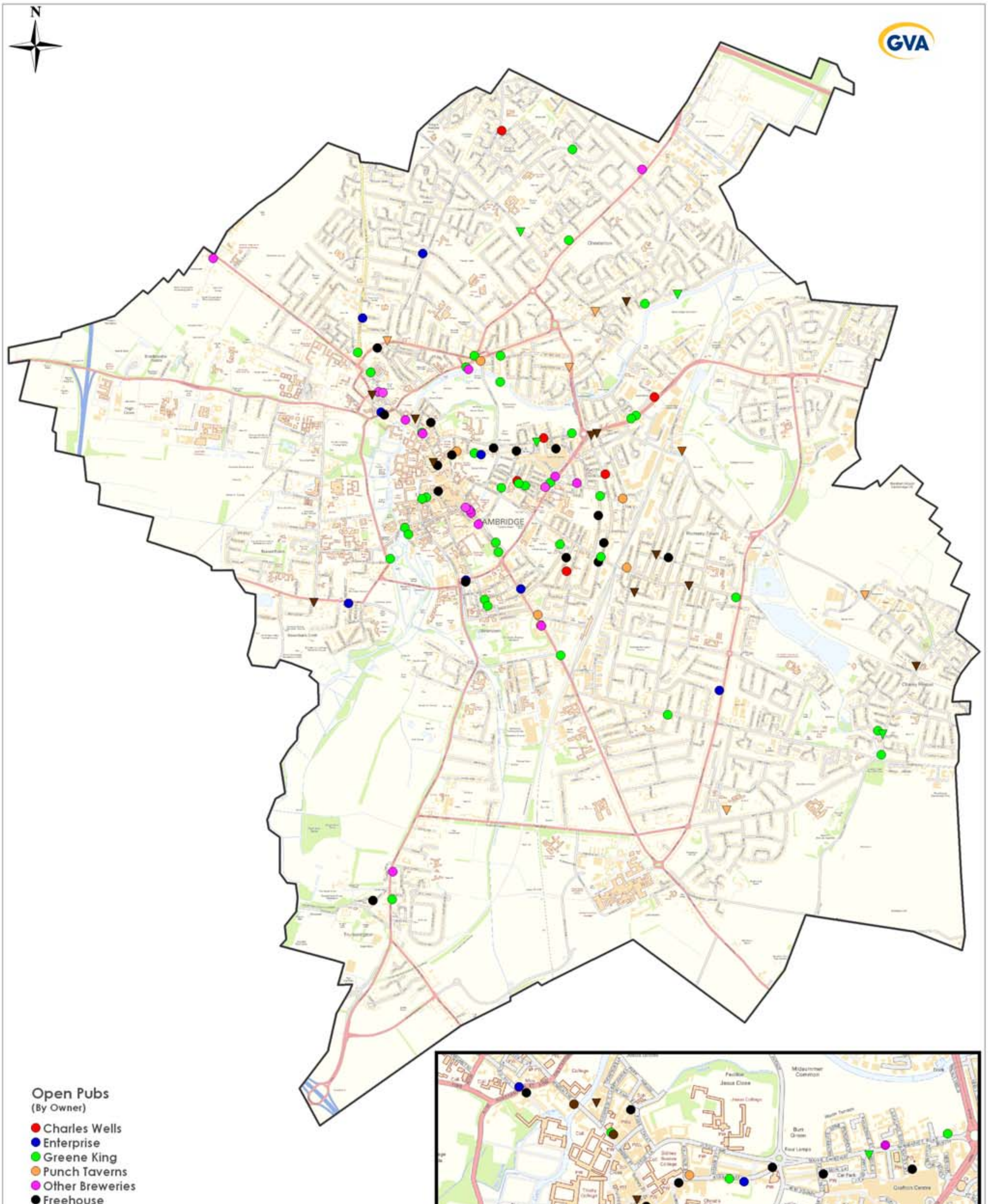
# Appendix D

## Pubs by Owner

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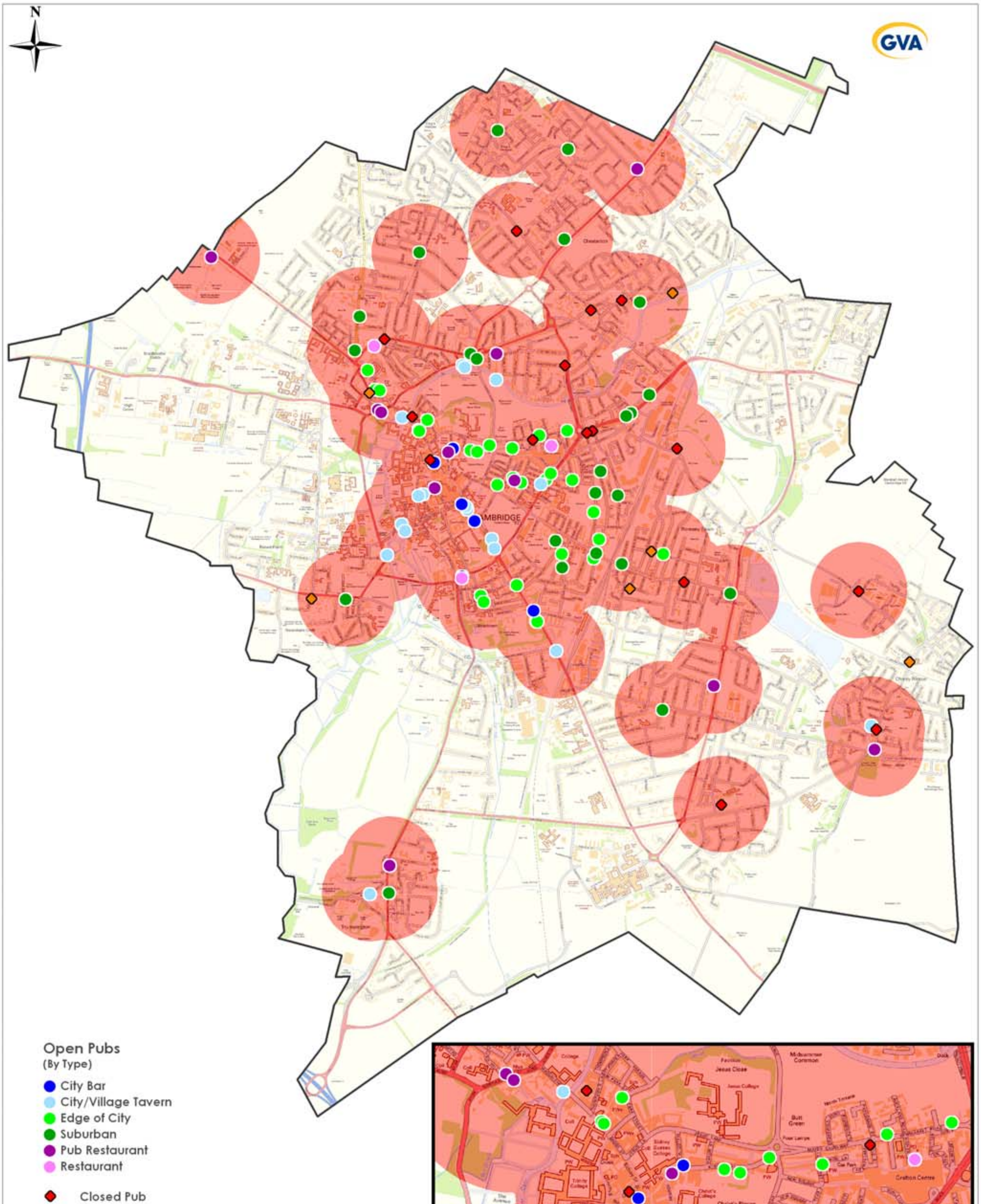
# Appendix E

Current Areas of Pub Deficit

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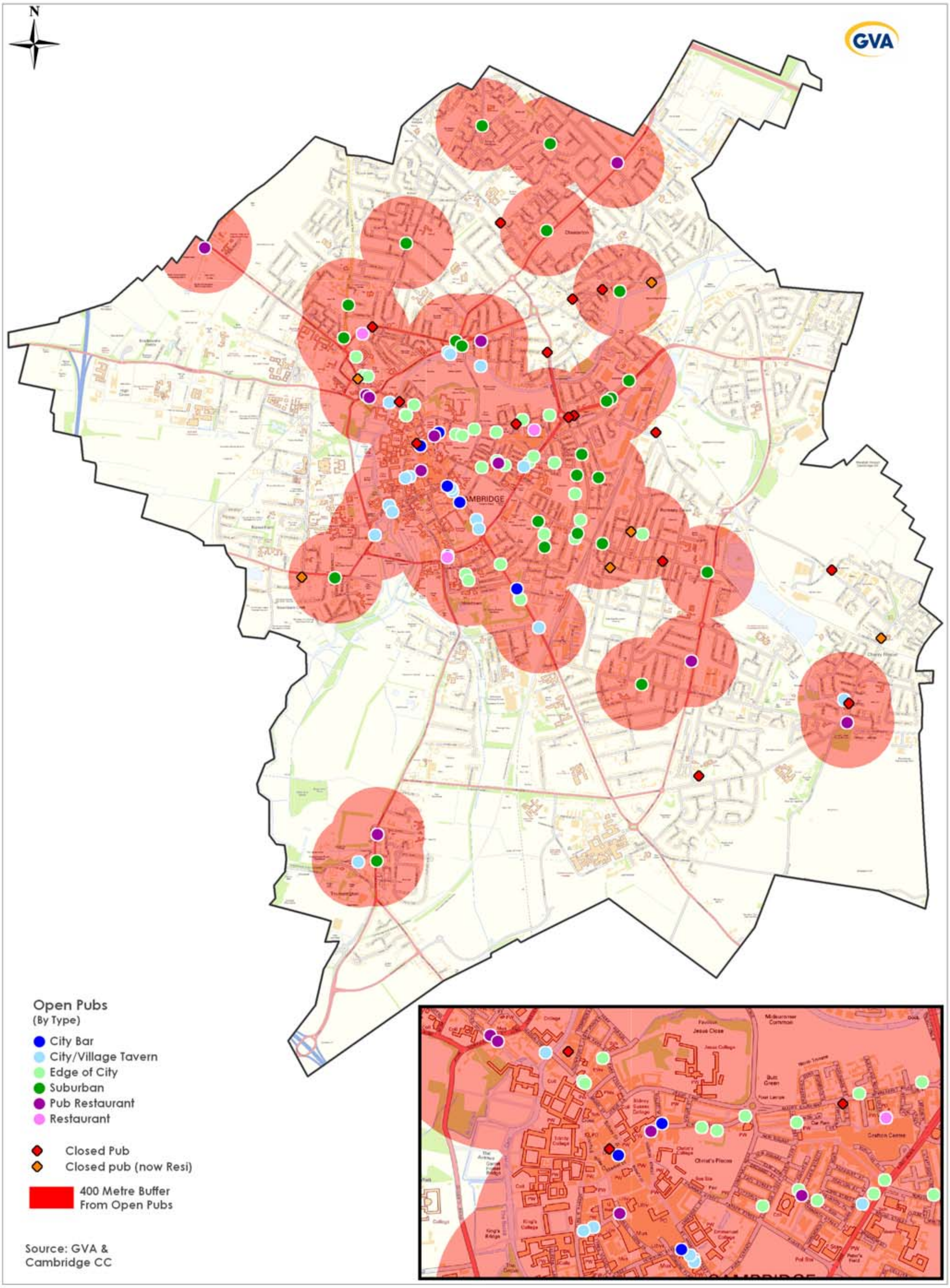
# Appendix F

Areas of Deficit with Closed Pubs

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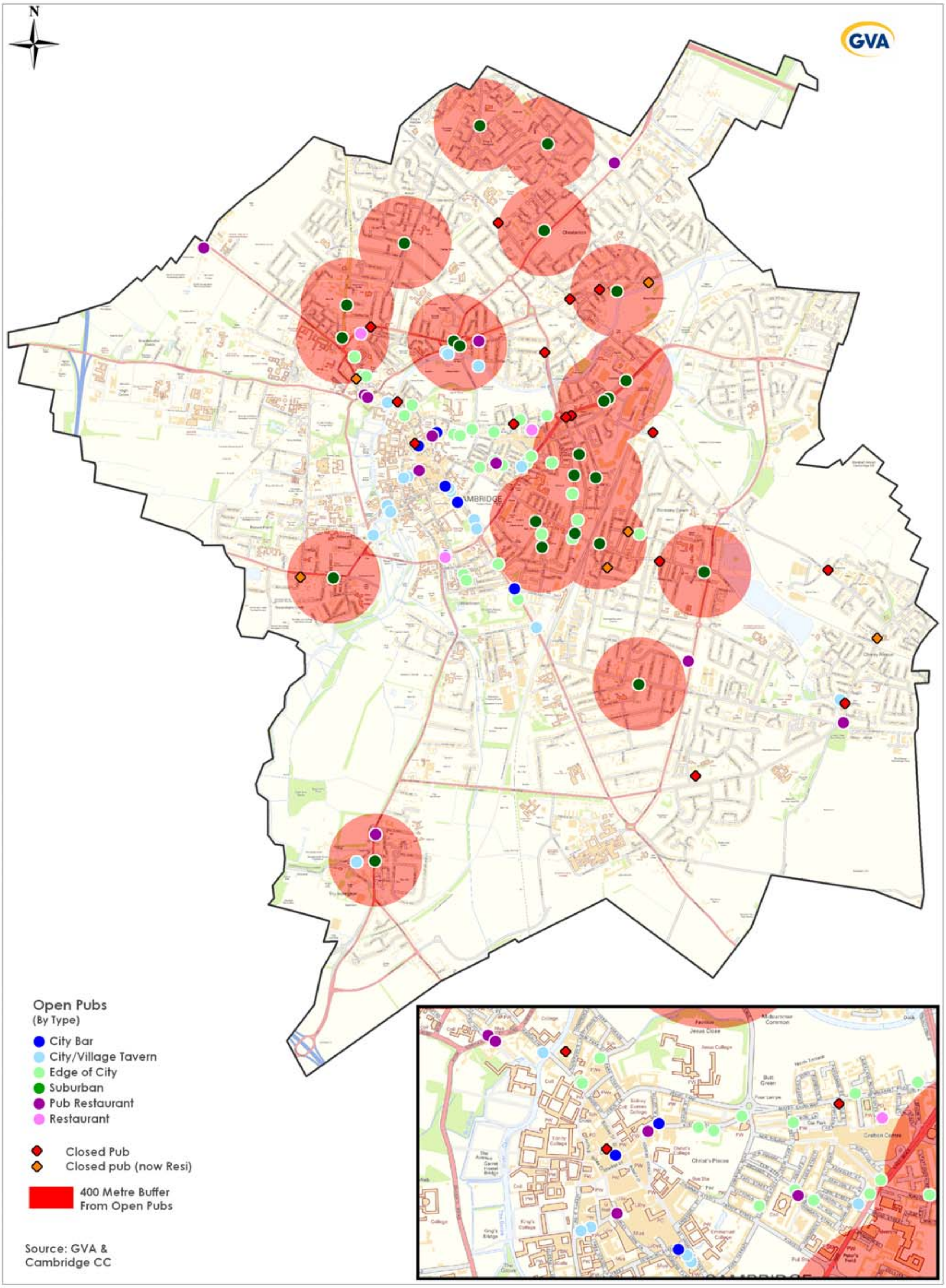
# Appendix G

400m catchment for local community pubs

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