Leicester City Council and Blaby District Council

Town Centre and Retail Study

Final Report

September 2015

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1.0 Introduction

Instruction

1.01 WYG Planning (hereafter referred to as 'WYG') was commissioned by Leicester City Council and Blaby District Council in October 2014 to undertake a Retail and Capacity Study for the two authority areas.

1.02 The key purposes of the Study were identified in the Request for Quotation document. Section 2 of the Request for Quotation set out four key objectives for the Study, these being:

- Provide a review of the vitality and viability of the main centres and assess their function;
- Define a network of hierarchy of centres (including planned centres);
- Identify the quantitative and qualitative need for retail and other town centre uses up to 2031 and set out appropriate strategies to meet any identified needs; and
- Advise on the need for a locally derived threshold for impact assessments and the level at which this should be set.

1.03 Given the above requirements, it is envisaged that the Study will act as the evidence base to assist in the formulation of future development plan policy, as well as providing baseline information to assist in the determination of planning applications for retail development.

1.04 In addition to considerable work 'in the field' to determine the current health of all defined centres, the Study also draws upon new empirical research, with NEMS Market Research Limited (NEMS) undertaking surveys of 1,600 households within a defined Study Area in November 2014. The Study Area for the household survey comprises 16 zones which are based on postcode sectors grouped to reflect areas which are likely to exhibit similar patterns of shopping behaviour. The Study Area encompasses the two local authority areas, but also includes locations further afield (such as Oadby and Hinckley, which to some degree look towards facilities within the Study Area to help meet their retail and leisure needs). In addition, NEMS also carried out an 'in-street' survey of visitors to Leicester city centre in November 2014.

1.05 In assessing the quantitative needs of the two authorities, the Study draws upon the most recent Experian Micromarketer G3 (MMG3) population and expenditure data (published October 2014) in order to establish the up-to-date position with regard to both convenience and comparison goods capacity.

Structure of Report

1.06 Our report is structured as follows:

- Section 2 provides a context for the Study by providing an analysis of key retail trends;
- Section 3 considers the up-to-date position in respect of relevant national retail and town centre planning policy;
- Section 4 presents the key findings in respect of the household and in-street survey research;
- Section 5 considers the vitality and viability of Leicester's and Blaby's town, district and local centres;
- Section 6 identifies current and future population and expenditure levels within the Study Area;
- Section 7 provides our assessment of the quantitative and qualitative need for further convenience and comparison goods retail floorspace over the assessment period;
- Section 8 considers the need for additional commercial leisure development;
- Section 9 summarises our key findings for Leicester and sets out our recommendations in respect of its future retail and town centre strategy; and
- Section 10 summarises our key findings for Blaby and sets out our recommendations in respect of its future retail and town centre strategy.

2.0 Current and Emerging Retail Trends

Introduction

2.01 The retail property landscape across the UK has evolved significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of retail warehouse parks and out-of-town regional shopping malls. For most of this period, the retail and leisure sectors have experienced considerable expenditure growth, which has been attributed to a number of factors, including greater disposable income, availability of credit, new technology and a general overall increase in our standard of living. However, recent economic conditions have had a clear impact on expenditure and convenience goods spending per capita has actually reduced in recent years. The way in which goods are purchased has also altered due to the increased popularity of 'e-tailing', which now claims more than one in every ten pounds spent in the UK.

2.02 The retail and leisure market and the need for new development continually evolves as a result of numerous factors including demographics, consumer demands, car ownership, planning policy and technological advancements. The share of retail spending has undergone a significant shift in the decade since 2002, with Verdict identifying that town centre spending as a proportion of overall spending declined from 47.7% to 39.9% at 2012. In contrast, spending in out of centre locations has increased over the same period by 2.1% and non-store locations (principally internet retailers) by 6.6%[1]. These changes have had a major impact on the format and location of retail and leisure floorspace, which has led to recent Governments reaffirming their commitment to the 'town centre first' policy approach that is now outlined in the National Planning Policy Framework (NPPF) (March 2012).

Current Retail Picture

2.03 A recent report by Colliers[2] provides information regarding recent trends, together with forecasts for the future of retailing in the UK. The findings confirm that the retail sector has been significantly affected by the wider economic climate and that there is considerable uncertainty about the strength and durability of future growth. However, Colliers reports that the recent improved economic outlook is beginning to result in increased consumer confidence and pockets of retailer expansion which are resulting in a reduction in vacant retail space. Furthermore, it is evident that the UK unemployment rate is currently falling (recorded as being 5.7% between October and December 2014, compared to

[1] 'UK Out of Town Retailing', Verdict Datamonitor, April 2012
[2] 'National Retail Barometer: Summer 2014', Colliers, September 2014

6.0% between July and September 2014)[3] and that average pay for employees in Great Britain increased 2.1% between October and December 2014 compared to the same period 12 months earlier[4].

2.04 Notwithstanding these very recent encouraging signs, the economic conditions of the past few years have had a significant impact on the public's ability and willingness to spend their earnings on retail goods. Since 2010 there have also been increases in taxation (for example in VAT, national insurance contributions and capital gains tax) which also impact upon households' spending. Furthermore, in recent years inflation has consistently been at a level beyond average earnings growth and a delay in reviewing business rates has been identified by both the Portas[5] and Grimsey[6] Reviews as a key factor affecting the success of many operators.

2.05 Recent economic conditions have resulted in significant structural changes to the high street, whereby the pressure on retailers to remain solvent has meant that many are showing increased signs of caution in their investment decisions. In particular, retailers are rationalising their physical store portfolios by reducing their number of stores, abandoning their representation in weaker centres and concentrating on acquiring sites in city centres and major regional shopping centres. The Grimsey Review identified that the national vacancy rate at 2013 equated to over 22,000 empty shops across the top 650 town centres. The Centre for Retail Research[7] estimates that overall store numbers will fall by 61,930 between 2012 and 2018, with the main impact being upon non-food stores. The report also estimates that 316,000 people will become unemployed, permanently or temporarily, as a result of these store closures.

2.06 To address this, many retailers have sought to re-negotiate their lease terms with landlords in order to enable them to switch from quarterly rents to monthly agreements, with several high street firms (including Monsoon and New Look) trying to ease the cash flow burden of paying rent three months in advance. Furthermore, some retailers are finding it increasingly difficult to justify being represented in every town in the UK and in less profitable markets. As a consequence, demand has reduced considerably for 'poorer quality premises' in secondary locations and in many smaller towns with a commensurate drop in value (and often rent). Large cities and towns are likely to suffer less

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[3] 'Labour Market Statistics, February 2015 Release', ONS, February 2015
[4] Ibid
[5] 'The Portas Review', December 2011
[6] 'The Grimsey Review – An Alternative Future for the High Street', September 2013
[7] 'Retail Futures 2018', Centre for Retail Research, May 2013

compared to smaller centres, given that they provide an enhanced choice for customers and offer the greater retail and leisure 'experience' that consumers increasingly desire.

2.07 In summary, there has been a marked polarisation and divergence in retailer spending, characterised by diminishing demand for secondary premises in smaller peripheral centres and increasing interest for well located and appropriately configured floorspace in key centres. It is evident that whilst Central London, regional city centres and regional shopping malls are relatively stable, a significant number of small and medium sized towns which serve a localised catchment may need to implement innovative ideas in order to compete for expenditure and reduce trade leakage.

2.08 In terms of retail rental values, Colliers[8] notes that national rates increased by 0.1% in Quarter 1 of 2014, to end 11 consecutive months of decline and to provide evidence that conditions in the retail mark are stabilising. However, Colliers also reports that this position is skewed by growth in London and a small number of other destinations, with towns that have benefitted from growth typically being able to offer: an under-supply of retail floorspace; a tight prime pitch; strong tenant demand; affordable rents; a wealthy demographic; and, limited out of town provision.

2.09 Given current spending patterns and the wider uncertain economic climate, it is unsurprising that Experian, which monitors and forecasts retail consumer expenditure in the UK, has in recent years identified significant changes when reviewing its forecast growth rates for both convenience and comparison goods expenditure over the short term. Experian's[9] forecast annual per capita convenience goods growth rate is -0.5% at 2014, +0.5% at 2015 and +0.4% at 2016. By way of contrast, Experian[10] forecast in 2009 that per capita convenience goods growth would equate to +1.1% per annum across these same three reporting years.

2.10 However, Experian's forecast annual per capita comparison goods growth rates are significantly more positive than in the recent years and are similar to those recorded prior to the recession. Experian identifies per capita growth of +5.6% at 2014, +4.4% at 2014 and +3.1% at 2015.

2.11 Despite difficulties in recent years across the comparison goods sector, certain types of retail have continued to perform well. The market for recreational goods has, on the whole, performed strongly

[8] 'Midsummer Retail Report 2014: Coming Up for Air', Colliers, July 2014
[9] Experian Retail Planner Briefing Note 12.1 (Figure 1a), October 2014
[10] Experian Retail Planner Briefing Note 7.1 (Figure 1), August 2009

in recent years, with healthy growth attributed to supermarket sales together with the growing popularity of online shopping, which continues to see an increase in sales year-on-year. However, the manner in which such purchases are made has changed considerably, with the increasing popularity of the internet to purchase books and music having a notable impact on the composition of town centres, with such stores all but disappearing from the high street. Other businesses have experienced growth in the last two years, with the Grimsey Review[11] reporting a 12% increase (equating to an additional 1,100 stores) in 'value-related retailing' outlets, including second-hand, discount and charity shops. The Grimsey Review also makes reference to the expansion of pawnbrokers, pay-day lenders and betting shops which have collectively experienced a 17% growth in the number of such outlets since 2011.

Trends in Comparison Goods Retailing

2.12 Whilst it is not anticipated that growth in retail spending over the next ten years will mirror that achieved after the turn of the millennium, there is expected to be some growth in comparison goods expenditure in coming years. Consequently, there is an increasing focus from retailers on achieving more efficient use of their floorspace, particularly given the recent poor performance of certain national multiples, many of which have been affected by the significant increase in e-tailing and increases in rental levels secured before 2008. As a result of the current economic climate, retailers are more reluctant to commit to new development than they have been in previous decades. Instead, they are more selective and are holding out for accommodation that is appropriate both in terms of location and the type of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve more efficient use of floorspace and attract shoppers from a wider area. These larger floor plates enable operators to provide a greater range of goods; for example, in 2011, when the retail market was generally stagnant, Primark opened one million sq.ft of new retail space.

2.13 International market conditions and price deflation in some key sectors have also meant that many high street names are becoming increasingly vulnerable to takeover. This is being pursued through disposals, company voluntary administrations (CVAs), informal arrangements with landlords, lease expiries and break options. More generally, whilst there is likely to be continued demand for larger, modern retail units in the future, increased sensitivity over future viability will mean a cautious approach to new investment for many key national retailers. Marginal locations within centres will increasingly be rejected. Many national retailers, who would have previously considered smaller/lower order centres in order to increase their market share, are now assessing their future strategies given

[11] 'The Grimsey Review – An Alternative Future for the High Street', September 2013

the ongoing downturn in the economy. Consequently, many investment decisions will be influenced by the scale of commitment from other retailers; developers will increasingly need to promote large town centre redevelopment schemes with anchor tenants if they are to attract other high quality retailers.

Trends in Food Retailing

2.14 In the aftermath of the growth in the number of edge and out of centre large format supermarkets during the 1990s, development of such facilities is now more limited due to stricter planning laws (following the publication of PPS4 and, subsequently, the NPPF) and a lack of suitable sites. As a result, the national multiples in the food retailing sector are finding a range of other measures to improve their market share. These include:

- Offering a wider product range, such as financial and insurance products, petrol and non-food goods;
- Developing a wide range of retail models, for example small-format convenience stores in town centres (e.g. Sainsbury's Local, Tesco Express), smaller supermarkets mostly in town centres (e.g. Tesco Metro), superstores (e.g. Tesco) and hypermarkets (e.g. Tesco Extra, Asda Supercentres);
- Extended opening hours;
- Offering cheap products and no-frills service;
- Providing an attractive and powerful brand image; and
- Offering a home delivery service.

2.15 Mintel[12] identifies that the recession – allied with a period of higher inflation – has had an impact on consumer behaviour and the wider dynamics of grocery retailing. Price, or specifically value, is now identified as the key issue for consumers, and more shoppers are assessing whether purchases represent value for money. Shoppers now realise that they are able to 'trade down' and switch to own-label ranges or to discount retailer to save money without sacrificing on quality. Indeed, customers are mixing value and premium in the same basket. It is noted that as weekly food budgets fall and consumers alter their shopping habits, growth will be limited and the battle for market share will intensify further. Winning a share of consumer spend will require more than low prices, with shoppers increasingly seeking to source high-quality, good value food.

[12] 'Food & Drink Retailing', Mintel, March 2013

2.16 The changing UK demographics are also having a major impact on the food and grocery sector. For example, there has been a rise in single occupancy young professional households who are 'time poor' and relatively 'cash rich'. Though their baskets might be small, they tend to buy higher value items, therefore providing an opportunity to boost volume and value growth. Elsewhere, an ageing population profile is leading to a rise in time rich consumers who are likely to make more frequent small trips rather than do large weekly shops. The contrasting requirements of these markets means that retailers are seeking to open a variety of stores with a particular current focus on discount and small convenience stores.

2.17 Verdict[13] estimates that the food and grocery sector was worth an £139.5 billion in 2014, equating to an annual growth of 2.8%. The four key supermarket chains in the UK have respective market shares of 27.0% (Tesco), 16.3% (Asda), 15.6% (Sainsbury's) and 10.1% (Morrisons). National multiple retailers, which also include operators such as Co-operative Food (5.1%), Aldi (4.2%) and Waitrose (4.0%), represent a total grocery market share of 90.9%.

2.18 There has been a recent slowdown in the growth plans of the majority of the principal supermarket operators. Tesco, for example, indicated in April 2013 that it had scrapped plans for major store developments on more than 100 sites and would instead focus on developing medium size units. It then subsequently announced in January 2015 its intention to pull out of a further 49 store development and to close 43 existing stores.

2.19 Asda is the second largest supermarket retailer in the UK, with more than 550 stores nationwide. In contrast to Tesco's plans, it announced in February 2015 its intention to invest £600m opening 17 new supermarkets and revamping 62 more. It also intends to open a further number of petrol filling stations and develop locations where shoppers can pick up groceries ordered online. Asda's focus for additional openings is believed to be London and the south of England.

2.20 Morrisons also intends to fewer larger stores once its current pipeline of development is completed. Its recent focus has been on developing the small-scale M Local convenience format store, which has significantly fewer stores than either Tesco Express or Sainsbury's Local. However, the retailer posted disappointing results for the year to 1 February 2015 and announced the closure of 23 M Local store with the loss of 300 jobs. Its current priority is believed to be investment into its existing portfolio of stores.

[13] 'UK Food & Grocery – Verdict Sector Report', Verdict, October 2013

2.21 Sainsbury's announced in October 2014 its intention to further develop the Sainsbury's Local format and to improve its online offering. However, its most significant move is to enter the discount market under the Netto fascia, with Sainsbury's owning a half share in Netto's UK operation. Netto announced the trialling of 15 stores in November 2014 clustered around the M62 corridor between Liverpool and Hull in order to 'test the water'. Two new build openings were announced in March 2015 in Lymm and Hull, which appears to suggest confidence in the venture.

2.22 Emboldened by changing convenience goods shopping patterns and significant increases in their market share, Aldi and Lidl have both announced ambitious store opening targets that, if met, will further increase pressure on the 'main four' operators (these being Asda, Morrisons, Sainsbury's and Tesco). Recent announcements suggest that Aldi is seeking to add more than 1 million sq.ft of additional floorspace in 2015 through the opening of around 60 stores and that Lidl will also add around 340,000 sq.ft this year.

2.23 More generally, the role of supermarkets has continued to develop in recent years, with the large operators now offering a greater diversity of goods and services, via a larger number of formats and locations. Food and non-food sales are also increasingly being driven by large supermarket growth, with half of town centres competing with five or more supermarkets within a two mile radius[14]. Whilst the exact impacts which will arise from the opening of a new supermarket are dependent on local circumstances, BCSC notes that there has been a significant decline in the number of independent food retailers in recent times, including a reduction of 45% between 1996 and 2007 in the number of greengrocers. Over the same time period the market share of total retail sales secured by supermarkets increased from 38% to 42%.

Leisure Sector

2.24 The daytime and evening leisure sector has undergone a major shift in the last five years, with the reduction in the income levels of consumers having an impact on their ability to spend on these types of discretionary activities and items. Mintel calculated that the total UK leisure market was worth almost £70 billion in 2012, only 0.2% higher than in 2007[15]. A review of the leisure activity participation and frequency levels indicates that eating and drinking out of the home still remain the most popular activities which people do on a monthly basis, with the cinema the next most popular of

[14] 'What Does the Future Hold for Town Centres?', BCSC, September 2011
[15] 'Leisure Review', Mintel, December 2012

the non-food and drink-led activities. Other activities, including going to a theatre, tenpin bowling and visiting a zoo are, on average, undertaken less frequently and this is at least in part reflective of their greater average cost. It is expected that the difficult trading conditions for the leisure sector are set to continue in the immediate future as a result of the shortfall in the amount of money that consumers have available to spend.

2.25 The number of leisure centres and swimming pools has increased in the past few years, though many local authorities are currently under budget constraints and there is some evidence that the ongoing operation of such leisure facilities is, on occasion, being threatened. Mintel[16] notes that 38% of adults use a health centre or swimming pool and research by the Leisure Database Company[17] indicates that the health and fitness private sector had a market value of approximately £3.9 billion in March 2012, an increase of 1.5% over the previous twelve month period. Mintel also notes that, whilst only 15% of adults currently use a private health and fitness club, the potential for a further expansion of the market remains strong.

2.26 The health and fitness sector is dominated by the David Lloyd Leisure and Virgin Active operators, with these two health clubs having approximately 455,000 and 435,000 members[18]. There has also been a rapid growth in the number of the no-contract budget club operators, with Pure Gym (260,000 members) and The Gym (255,000 members) ranked fourth and fifth in the list of leading chains behind DW Sports Fitness which has 275,000 members. Mintel identifies that there has been a growth in the popularity of innovative exercise classes and technological features to attract additional people to these clubs, with many of the higher end clubs also adding spa facilities to their offer.

2.27 In terms of other leisure activities, the cinema sector is performing steadily, with data indicating that there were 173 million UK cinema admissions in 2012, an increase of 0.5% since 2011. Mintel[19] identifies that the eating out market has grown by around 8% between 2008 and 2013, and by an estimated 2.3% between 2012 and 2013, to an estimated £32.1 billion. It recognises however that this has largely been driven by inflation, with consumer demand muted by recent low consumer confidence levels.

[16] 'Leisure Centres and Swimming Pools', Mintel, January 2013
[17] 'State of the UK Fitness Industry', The Leisure Database Company, June 2013
[18] 'Health and Fitness Clubs', Mintel, June 2013
[19] 'Eating Out Review', Mintel, June 2013

Out of Centre Development

2.28 Despite the 'town centre first' planning policies which have been adopted by recent Governments, research undertaken by Verdict[20] indicates that between 2007 and 2012, the amount of out of centre floorspace increased by 23%. However, in very recent years, Colliers notes that the demand for out of centre representation has been limited, with those retailers seeking to acquire stores having a pick of vacant stock which has been made available through the administration of MFI (in November 2008), Land of Leather (in January 2009) and Focus DIY (in May 2011), amongst others. However, only five retailers with any significant out-of-town presence have failed since June 2011, these being Allied Carpets, Clintons, Comet, GAME and Peacocks.

2.29 The national average vacancy rate[21] in out of centre retail warehouses in 2014 was 8.0%, an increase of around 4.1% since 2012. Some of the voids created by administrations remain un-let and the flooding of the market with so much unwanted space has acted to reduce rents. Retailers who have had their pick of the best stores include Dunelm, Pets at Home, Dreams, Matalan, Dixons Group, Go Outdoors, B&M, Mothercare, Next Home and TK Maxx.

2.30 Looking forward, Colliers[22] indicates that future out of centre development will fall into two main categories. The first relates to the adaptation and refurbishment of existing stock. Colliers states that between 80% and 90% of the retail warehousing stock that the UK requires to service demand has already been built. Accordingly, most development activity will see landlords seeking to improve the suitability of their property for the latest retailers and also make improvements to improve dwell time on retail parks (for example, by seeking to introduce coffee shops and restaurants). Older schemes may be remodelled or redeveloped to meet current needs. According to Colliers, the other main strand of out of centre retail development relates to opportunities in areas where there has not been a great deal of retail warehousing in the past.

Shopping Centre Development

2.31 Shopping centre retail development has been at a virtual standstill in recent years, but there are a few signs that a corner may about to be turned. Cushman & Wakefield[23] reports that development activity was restrained in 2014, with an estimated 124,300 sq.m of shopping centre space added over the course of the year, which is less than half the total added in 2013. Cusham & Wakefield indicates that

[20] 'UK Out of Town Retailing', Verdict Datamonitor, April 2012
[21] 'Vacancy Report Summary H2 2014', Local Data Company, February 2015
[22] 'Midsummer Retail Report 2014: Coming Up for Air', Colliers, July 2014
[23] 'Marketbeat Shopping Centre Development Report', Cushman & Wakefield, September 2014

the shopping centre development pipeline for 2015 totals 154,618 sq.m and includes the 51,100 sq.m Westfield Bradford and the 27,870 sq.m Friars Walk in Newport, both of which are scheduled to open in Autumn 2015. It is anticipated that next year will see the delivery of several shopping extensions, including Birmingham's Grand Central centre, which when complete, will nearly double its size to 53,000 sq.m. Cushman & Wakefield forecasts that the shopping centre pipeline will pick up significantly from 2017 as the economic recovery and the greater availability of finance help to bring forward new schemes and extensions that already have planning permission.

2.32 Notwithstanding this, the viability of shopping centre retail development remains, for the moment, challenging no matter how well designed or well located a scheme is. There are three types of scheme which have a better chance of success in the current economic climate. The first of these will be where a town has a large, affluent catchment and an acknowledged undersupply of retail floorspace in both town centre and out-of-town locations. The second scenario relates to schemes which were very close to happening before the recession took hold, which may be revised to better meet the current needs of the market. Barnsley, Macclesfield, Bradford and Lichfield are examples of such schemes. The third opportunity relates to development where the key anchor is a foodstore and, as a result, demand has remained strong. However, due to changes in the food retail sector and the trading model of the 'main four' operators, opportunities in this latter category are more difficult to come by.

2.33 In addition to retail, food and drink is becoming an integral part of many shopping centres. In particular, consumers are increasingly travelling to larger centres to use the leisure facilities and experience more of a complete 'day out'. In the past, it was relatively typical for non-retail uses to occupy less than 10% of shopping centre floorspace, but this has increased in recent schemes, including Westfield in Stratford where catering and leisure units occupy over 20% of the space.

Growth in E-tailing ('E-commerce')

2.34 Many consumers who previously shopped in town centres and at retail parks are now increasingly using the internet to make purchases. Experian[24] identifies that internet sales' share of total retail sales stood at 10.6% in mid-2014 compared to just 4.7% at June 2008. The value of internet sales in 2014 is estimated at £37.2 billion.

[24] 'Experian Retail Planner Briefing Note 12.1', October 2014

2.35 The rise in recent years of e-commerce has had a major impact upon retailers, developers and investors alike, with the top 10 e-retailers in 2012 including Amazon UK (16%), Shop Direct (5%) and Next (4%)[25]. As access to the internet/online shopping continues to grow through digital televisions, tablets and mobile phones, proportionally less money is anticipated to be spent on the high street or at retail parks.

2.36 The growth in internet as a sales medium has been enabled by the increase in access to the internet by households, which the Office for National Statistics[26] reports increased from 57% at 2006 to 83% in 2013. A total of 22 million households in Great Britain now have internet access. The proportion of households with access to the internet is expected to increase further over the coming years, alongside the growth in mobile phone and tablets with access via the new 4G spectrum. The ONS states that access to the internet using a mobile phone more than doubled between 2010 and 2014, from 24% to 58%. This has supported the strong growth recorded, together with improved consumer confidence in the security of online payment, deliveries and heavy demand for expensive electrical products available online. The option of using the internet to 'click and collect' in-store at a dedicated counter is also increasing in popularity (particularly within stores with large sales areas), with the service now accounting for around a fifth of John Lewis internet orders.

2.37 As a consequence of such changes, the Office for National Statistics[27] indicates that the number of people using the internet to purchase goods continues to rise, with 74% of the UK population purchasing products over the internet in 2013, compared to 53% in 2008. The most popular online purchases were clothes/sports goods, with 49% of all adults in the UK purchasing some items via the internet. In addition, 42% of the population bought household goods online and 23% bought food or groceries.

2.38 Online spending continues to be the key growth opportunity for national and independent retailers, accounting for increasing proportions of total sales. For example, online sales at Next in 2011 accounted for 44% of operating profit and 32% of group sales. With regard to foodstore operators, food accounts for 20.5% of all internet sales, which equates to 3.1% of all food retailing[28]. Verdict's research identifies that, with the exception of Morrisons (though it is currently in the process of establishing an online presence via Ocado), major retailers have seen their business grow as online shopping has increased and, as a result, the likes of Asda and Sainsbury's have improved their

[25] Ibid
[26] 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2013
[27] Ibid
[28] 'Shop Expansion and the Internet', CBRE, May 2012

geographical coverage and capacity. In particular, online sales at Tesco currently exceed £2 billion, with Colliers noting that the operator has a reported 48% online grocery market share.

2.39 It is evident that internet shopping as a whole is having an impact upon traditional high streets, in light of increased competition and lower prices. Consequently, there is a possibility that online retailing will continue to put some pressure on retail rental growth over the next five to ten years. In particular, it appears likely that smaller town centres (which may be less able to offer a complete 'shopping experience') are likely to be the subject of greater ongoing impacts from online retailing.

2.40 Despite some variance in the estimated future growth of online shopping, it is clear that e-tailing cannot entirely replace the 'shopping experience' as shopping is a social activity. In this regard, retailers are already adopting innovative approaches to encourage people to visit their store through 'try before you buy' concepts. For example, Ellis Bingham has installed Vertical Chill indoor ice climbing walls at five stores for customers to try equipment and to interact with products. For successful retailers, online selling provides an additional route to the market. Online retailers benefit from demand generated through physical channels whilst high street outlets can benefit from reaching a wider customer base through the internet. Those retailers who are likely to have a healthy future are those who are able to combine a strong high street presence with an interesting and closely related e-tail offer.

Summary

2.41 In summary, it is evident that the retail market has undergone significant changes in recent years. Wider economic conditions facing the UK have led to a marked decline in some previously healthy town centres, as well as other traditional retail formats. This has principally been caused by a decline in available expenditure, due to suppressed disposable incomes and an increase in the proportion of expenditure committed online.

2.42 However, 2014 has seen an increase in consumer confidence, mainly driven by an improved economic outlook as a result of falling unemployment and the availability of credit. As a consequence, it is anticipated that expenditure growth rates will increase moving forward. Whilst such forecasts remain below those achieved before the recession, they are significantly higher than those recorded over the last three or four years. The growth in online sales has also impinged on the need for new tangible floorspace. However, increased expenditure growth allied with the retail industry embracement of innovative multi-channelling retail strategies, provides an opportunity for town centres to widen their audience in the future and retain ground. To deliver on this, it will be critical that town centres are flexible enough to both embrace and complement digital solutions, whilst also providing appropriate and well managed retail floorspace that can showcase products and services. The ability for centres to 'move with times' and utilise modern technology, whilst providing a materially different experience to online shopping (partly through the inclusion of leisure and food and drink offers), will help ensure their ongoing vitality and viability.

3.0 Planning Policy Context

Introduction

3.01 Given that this Study seeks to provide important evidence to assist in the production of future retail planning policy, it is important to review existing national planning policy of pertinence to retail and town centre matters to explore the context for the Study and how it may impact upon the production of future development plan policy. We also summarise Leicester's and Blaby's adopted and emerging planning policy, insofar as it is relevant to retail and town centre matters, in order to consider the Council's strategy in respect of its centres.

National Planning Policy Framework

3.02 The National Planning Policy Framework was published in March 2012. The NPPF replaces all former Planning Policy Statements, Planning Policy Guidance Notes and some Circulars in a single consolidated document.

3.03 The main theme of the NPPF is that there should be 'a presumption in favour of sustainable development'. In terms of plan-making, it is stated that local planning authorities should positively seek opportunities to meet the development needs of their area, with an emphasis on Local Plans having sufficient flexibility to adapt to rapid change.

3.04 In terms of economic development, it is set out within the NPPF's core principles that planning should proactively drive and support economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made to objectively identify and then meet the business and other development needs of an area, with positive responses made to wider opportunities for growth.

3.05 The NPPF stresses the Government's commitment to securing economic growth in order to create jobs and prosperity, with paragraph 17 stating that the planning system should do everything it can to support sustainable economic growth.

3.06 Paragraph 19 indicates that planning should operate to encourage and not to act as an impediment to sustainable growth, and that significant weight should be placed on the need to support economic growth through the planning system. The NPPF seeks to ensure that local planning authorities plan proactively to meet the development needs of business and support an economy fit for the 21st century.

3.07 The NPPF still recognises the need to promote the vitality and viability of towns and cities through the promotion of competition and growth management during the plan period. Paragraph 23 of the NPPF provides guidance for local planning authorities in drawing up Local Plans, it indicates that they should:

- recognise town centres as the heart of their communities and pursue policies to support their vitality and viability;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centre. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

3.08 Paragraph 23 also indicates that needs for retail, leisure, office and other main town centre uses should be met in full and should not be compromised by limited site availability.

3.09 Paragraph 24 requires local planning authorities to adopt a sequential approach to the consideration of planning applications for main town centre uses that are not in an existing centre or in accordance with an up-to-date Local Plan. The following paragraph 25 indicates that that the sequential approach should not apply to applications for small scale rural offices or other small scale development.

3.10 Paragraph 26 indicates that local planning authorities should require an impact assessment for retail, leisure and office development outside of town centres which are not in accordance with an up-to-date Local Plan and if the development is over a proportionate, locally set threshold. Where there is no locally defined threshold, the default threshold will be 2,500 sq.m.

3.11 Paragraph 27 indicates that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on the vitality and viability of a town centre or on existing, planned, committed investment in a centre it should be refused.

3.12 The NPPF also recognises that retail activity should still, where possible, be focused in existing town centres. Retail and leisure proposals which cannot be accommodated in or adjacent to the town centre will have to satisfy a dual impact test and the sequential test.

Ensuring the Vitality of Town Centres Planning Practice Guidance

3.13 Ensuring the Vitality of Town Centres National Planning Practice Guidance was published in March 2014 and replaces the previous Planning for Town Centres Practice Guidance. It provides a more concise summation of how retail and main town centre planning policy is to be applied in practice. However, the objectives of the Practice Guidance remain comparable with those of its predecessor, with there being a stated requirement for local planning authorities to plan positively and support town centres to generate local employment, promote competition within and between town centres, and create attractive and diverse places for users.

3.14 The Practice Guidance requires local planning authorities to fully assess and plan to meet needs for main town centre uses through the adoption of a 'town centre first' approach. Paragraphs 002 and 003 confirm that this should be delivered through a positive vision or strategy which is communicated through the development plan. The strategy should be facilitated through active engagement with the private sector and other interested organisations (including Portas Pilot organisations, Town Teams and so on). Any strategy should be based on evidence which clarifies the current state of town centres and opportunities to meet development needs and support centres' vitality and viability.

3.15 Such strategies should seek to address the following matters:

- the appropriate and realistic role, function and hierarchy of town centres in the area of over the plan period, including an audit of the vitality and viability of existing town centres and their ability to accommodate new development;
- consideration of the vision for the future of each town centre and the most appropriate mix of uses;
- the assessment of the scale of development that a town centre can accommodate;
- the timeframe for the delivery of new retail floorspace;
- what other complementary strategies are necessary or appropriate to enhance the town centre to deliver the vision in the future; and
- the consideration of the enhancement of car parking provision including charging and enforcement mechanisms.

3.16 Paragraph 005 of the Practice Guidance identifies a series of key indicators which are of relevance in assessing the health of a centre over time. Paragraph 005 goes on to state that not all successful town centre regeneration initiatives have been retail led or focused on substantial new development, but have instead involved improvements such as renewed public realm, parking, and accessibility and other partnership mechanisms.

3.17 Paragraph 007 identifies the importance of planning for tourism as an important component of any overall vision and indicates that local planning authorities should consider specific tourism needs (including locational or operational requirements) and opportunities for tourism to support local services, vibrancy and the built environment.

3.18 Paragraph 009 reaffirms the town centre first policy in the form of the sequential test, which requires local planning authorities to undertake an assessment of candidate sites' availability, suitability and viability when preparing their local plan. Such an assessment should also consider the scale of future needs and the type of land needed to accommodate main town centre uses.

Housing and Economic Development Needs Assessment Planning Practice Guidance

3.19 The Government has issued further Practice Guidance to provide specific instruction in respect of the undertaking of needs assessments (including those for main town centre uses). Paragraph 032 of the Practice Guidance states that plan makers should consider forecasts of quantitative and qualitative need based on a range of data which is current and robust. Local planning authorities will need to take account of business cycles and make use of forecasts and surveys to assess employment land requirements.

The Portas Review ('An Independent Review Into the Future of Our High Streets') and the Government's Response

3.20 The Portas Review was published in December 2011. It is an independent review undertaken by Mary Portas into the state of Britain's high streets and town centres. The review considers the reasons why retail spending on the high street is falling, why there has been a decline of Britain's high streets, and the benefits that can be brought about through the protection of Britain's high streets. Portas puts forward 28 recommendations which include actions that Government, businesses and other organisations should take in order to create diverse, sustainable high streets where retailers can thrive.

3.21 The Government published a response to the Portas Review in March 2012. The response acknowledges that in response to the challenges facing the high street, including out-of-centre retail development and online retailing, the high street will have to offer something new and different in order to create a diverse and competitive environment. In its response, the Government accepts a number of recommendations put forward in the Portas Review, including: the implementation of Town Teams (described as visionary, strategic and strong operational management teams for high streets); the provision of funding for pilot areas who are judged to have the best ideas for improving their town centres and high streets; investing in Business Improvement Districts; and support for a new National Market Day. The Government's response seeks to encourage areas to think creatively about how their town centres can be enhanced in order to entice people back, including improvements which could be secured through the redesign of high streets, and the promotion of the evening and night time economy.

Relaxation of Permitted Development Rights

3.22 At a national level, recent changes to the Town and Country Planning (General Permitted Development) Order 1995 have sought to support the diversification and vitality of town centres. The changes follow the Portas Report recommendation to make it easier to change surplus space in order to provide for the effective re-use of buildings.

3.23 The Town and Country Planning (General Permitted Development) (Amendment) (England) Order 2013 came into force on 30 May 2013. It provides, for a period of three years, for the change of use of Use Class B1 offices to residential without the need for planning permission. The Order also provides for the temporary change of use (for up to two years) of uses falling within Use Classes A1, A2, A3, A4, A5, B1, D1 and D2 to uses falling within Classes A1, A2, A3 and B1, subject to the use relating to no more than 150 sq.m of floorspace and subject to the temporary provision not previously being relied upon. The Order also provides for an increase in the permitted development threshold in respect of extensions to shops, catering, professional or financial services establishments to provide for an additional 50% gross floorspace or 200 sq.m (whichever is the lower).

3.24 Permitted development rights were further extended on 6 April 2014 to provide for certain additional changes of use without the need for planning permission. The changes come into force under the Town and Country Planning (General Permitted Development) (Amendment and Consequential Provisions) (England) Order 2014 and result in the introduction of two new classifications that affect commercial premises.

3.25 The first provides for the change of use of premises and land from Use Class A1 to use as a 'deposit taker' (effectively comprising banks, building societies, credit unions and friendly societies). The second provides for the change of use from Use Classes A1 and A2 to residential. There are certain restrictions as to where and when the rights can be exercised.

3.26 The intended consequence of such measures is to secure the redevelopment and reuse of premises. However, it is considered that the relaxation in respect of changes of use to residential are more likely to encourage re-use of offices in larger metropolitan areas (particularly in London and the south east) which may benefit from a greater supply of office buildings and where previously there may have been some reluctance to grant planning permission for residential uses.

3.27 A further amendment to permitted rights has occurred as a result of the Town and Country Planning (General Permitted Development) (England) Order 2015, which acts to consolidate the Town and Country Planning (General Permitted Development) Order 1995 and its many amendments.

3.28 The additional permitted development rights of particular relevance to retail and town centre matters include:

- a permitted change from amusement arcade/casino use (sui generis) to residential use (Class C3);
- a permitted change from retail (Class A1) to financial services (Class A2);
- a permitted change from retail/financial services (Class A1/A2) to food and drink (Class A3);

- a permitted change from retail/financial services (Class A1/A2), betting offices, pay day loan shops and casinos to assembly and leisure uses (Class D2);
- extension of the temporary permitted development rights introduced in May 2013 for extensions to shops, offices, industrial and warehouse buildings to support business expansion and the economy so they apply permanently;
- the erection of click and collect facilities within the curtilage of an existing retail shop; and
- modifications to the size of an existing retail shop loading bay.

Leicester City Council Development Plan Policy

3.29 The adopted development plan for the City of Leicester local authority area currently comprises the City of Leicester Core Strategy (adopted July 2014), read together with the 'saved' policies of the City of Leicester Local Plan (adopted January 2006) and the Leicestershire & Leicester Waste Core Strategy & Development Control Policies (adopted October 2009). The latter document is obviously of limited relevance to a retail study; accordingly, we summarise the City of Leicester Core Strategy and Local Plan policies of greatest relevance to retail development and town centres below.

3.30 Core Strategy Policy CS8 sets out the City Council's strategy in respect of existing neighbourhoods. The policy indicates that existing district and local centres will be supported as the most sustainable and accessible way to provide local shopping facilities to meet people's everyday needs. The policy also notes the particular role and function of specific centres. In this regard:

- Belgrave District Centre is to be promoted as a national shopping destination for Asian goods and for cultural events;
- Beaumont Leys Town Centre will be a focus for town centre use to serve the north and west of the City; and
- proposals to encourage the diversity of services available at Hamilton District Centre will be supported.

3.31 Core Strategy Policy CS10 indicates that the City Council will work with partners to ensure that Leicester has a thriving and diverse business community that attracts jobs and investment to the City. The policy states that at least 50,000 sq.m of new grade 'A' office development will be provided in the City Centre. It also goes on to identify locations which will be suited to accommodating growth in particular sectors.

3.32 Core Strategy Policy CS11 sets out the following retail hierarchy within the City.

- **Leicester City Centre**
  Leicester city centre will continue to act as the sub-regional centre and its Central Shopping Core will be the focus for new retail development.
- **Beaumont Leys Town Centre**
  Beaumont Leys is the location for town centre uses to serve the north west of the City and the surrounding urban area.
- **District Centres**
  The district centres comprise Hamilton, Belgrave Road, Evington Road, Narborough Road and Uppingham Road (East). They are to provide a range of facilities and will be accessible by public transport.
- **Local Centres**
  Sixty-seven local centres are identified which will provide convenience shopping close to where people live. New local centres will also be provided at Ashton Green, Waterside, Abbey Meadows and North Hamilton[29].

3.33 Core Strategy Policy CS11 goes on to state that a sequential approach will be taken to new retail and town centre development, and that development which would detract from the vitality and viability of centres will be resisted.

3.34 Core Strategy Policy CS4 sets out the City Council's strategy to develop the Waterside as an attractive, high quality, residential-led, mixed neighbourhood and city leisure attraction. The Council will do this by:

- encouraging a full mix of housing types;
- encouraging small scale offices and workspaces and supporting neighbourhood uses where they are on key safe, connecting routes;
- defining a new local centre to serve the area on the A50;
- improving vehicle and pedestrian access; and
- seeking to improve access links, education provision, improvements in the provision of public open space and health care facilities.

[29] The latter of which has now been provided in the form of the Sandhills Avenue development

3.35 The Council is shortly to adopt a Leicester Waterside Supplementary Planning Document to assist in shaping the appropriate future redevelopment of the site.

3.36 Core Strategy Policy CS12 provides for the future growth of the city centre. The policy sets out a number of measures to safeguard the centre's role and provide for wider regeneration, including *inter alia*:

- safeguarding the Central Shopping Core as the focus of city centre retail development;
- ensuring new retail development is well integrated and closely linked with the streets of the Central Shopping Core;
- ensuring that the principal retail streets remain principally in Class A1 use;
- enhancing the market;
- developing an economically prosperous city centre by supporting small offices, creative industries, new hotels and conference venues;
- supporting leisure development and cultural facilities;
- providing for a new city centre library;
- supporting residential development; and
- improving public transport facilities.

3.37 Of the Local Plan policies which have been saved, the following are considered to be of greatest relevance to the City's future retail strategy.

3.38 Saved Policies R02 and R03 set out a series of measures to seek to support the viability and vitality of existing and proposed centres.

3.39 Saved Policy R05 seeks to retain control over the type and number of food and drink operations within shopping centres.

Leicester City Council Emerging Development Plan Policy

3.40 The Council is progressing a Replacement City of Leicester Local Plan to replace all current development plan documents. The Replacement Local Plan is at a relatively early stage, with an Issues and Options consultation document being published in October 2014. A consultation draft of the plan is expected later this year.

3.41 The Issues and Options document indicates that the Council seeks to secure greater investment into the city centre and support more offices and homes in the centre so as to encourage a greater mix of leisure, retail and cultural activities. The document asks respondents to consider the appropriateness of the existing Central Shopping Core and whether additional retail and leisure development could take place outside the city centre.

3.42 The Issues and Options document also identifies the Waterside opportunity as a future residential-led, mixed use neighbourhood, which is to incorporate a new local centre.

Blaby District Council Development Plan Policy

3.43 The adopted development plan for the Blaby District local authority area currently comprises the Blaby Local Plan Core Strategy Development Plan Document (adopted February 2013), read together with the 'saved' policies of the Blaby District Local Plan (adopted September 1999) and the Leicestershire & Leicester Waste Core Strategy & Development Control Policies (adopted October 2009). The latter document is again of limited relevance to a retail study and, accordingly, we summarise the Blaby Core Strategy and Local Plan policies of greatest relevance to retail development and town centres below.

3.44 Core Strategy Policy CS1 sets out the overall strategy for new development and identifies a strategic objective to deliver the infrastructure, services and facilities required to meet the needs of Blaby's population, including those arising from growth, and to make services accessible to all.

3.45 Core Strategy Policy CS13 relates to retailing and town centres. The policy sets out the hierarchy of retail centres which meet residents' needs, with the role of Leicester city centre in this regard acknowledged as being of importance. Below this, the retail hierarchy of Blaby is as follows.

- **Blaby Town Centre**
  Blaby town centre is the principal centre in the local authority area and provides a range of facilities and services to meet the needs of a wider catchment area than just the town in which it is located.
- **District Centres**
  The district centres comprise Enderby, Glenfield and Narborough. They mostly comprise groups of shops containing at least one supermarket/convenience store, and a range of other retail and non-retail services, such as banks/building societies and restaurants, as well as local public facilities such as a library.

- **Rural Centre**
  Stoney Stanton is the only rural centre. It provides a wide range of services and facilities and regular public transport links to the nearby large employment centre of Hinckley.
- **Local Centres**
  The local centres comprise Cosby, Glen Parva, Huncote, Sapcote, Whetstone, Countesthorpe, Leicester Forest East and Kirby Muxloe. Typically such centres will include, amongst other facilities, shops, a small supermarket, a newsagent, a sub-post office and a pharmacy.
- **Out of Centre**
  Blaby District also contains the 'Motorways Retail Area' which includes Fosse Park Shopping Park and adjacent facilities.

3.46 The remainder of Core Strategy Policy CS13 indicates that Blaby town centre will be a focus for new retail development and that Classes A2 to A5, leisure, cultural, tourism and mixed use developments will generally be encouraged within the centre.

3.47 The policy also indicates that the Motorways Retail Area (comprising Fosse Park, Asda and the Grove Farm Triangle retail development) will be suitable to accommodate further managed growth subject to: there being no unacceptable impacts on existing centres; compliance with the sequential approach; demonstration that any additional development is capable of integrating with existing retail facilities; and, the incorporation of proportionate sustainability measures.

3.48 With regard to Meridian Leisure Park, which is situated off the A563 and close to junction 21 of the M1, Core Strategy Policy CS13 indicates that the additional managed growth of this facility may also be acceptable, subject to compliance with a series of criteria.

3.49 Finally, Core Strategy Policy CS13 also establishes a local impact threshold of 929 sq.m, above which applicants will be required to assess the impacts arising from proposals.

3.50 Of the saved Local Plan policies, the following are considered to be of greatest relevance to Blaby's retail strategy.

3.51 Saved Policy S14 provides for appropriate additional retail development to meet local needs in the centres of Cosby, Countesthorpe, Enderby, Glenfield, Huncote, Kirby Muxloe, Narborough, Sapcote, Stoney Stanton, Whetstone and a series of smaller neighbourhood centres.

3.52 Saved Policy S15 provides for the development of appropriate financial and professional services, food and drink uses, community facilities, medical facilities and residential development in the same centres.

Blaby District Council Emerging Development Plan Policy

3.53 The Council is currently in the early stages of progressing its Local Plan (Delivery) Core Strategy Development Plan Document. In this regard, a 'call for sites' was undertaken at the end of 2013 and Issues and Options consultation is expected later this year. Accordingly, as yet, there is no emerging policy of relevance to retail and town centre matters to summarise.

4.0 Original Market Research

Introduction

4.01 The undertaking of original market research enables in-depth analysis at a local level and allows the evaluation of the trade draw of particular town centres. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail floorspace across the Study Area. Notwithstanding this, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved, and the results should therefore be taken to be a broad indication of consumer preferences.

4.02 A key requirement of this Study is the detailed understanding of shopping patterns in terms of the use of retail centres and the identification of the centres' catchment areas. WYG commissioned specialist market researchers NEMS to undertake a comprehensive household telephone survey to identify consumers' habits and preferences in the Study Area. In addition, in order to gain a greater understanding of the role and function of Leicester city centre (and identify from where the city centre draws its custom) an in-street survey of shoppers and visitors has also been undertaken.

4.03 We set out the general methodological approach to the surveys and the key results below.

Household Survey

4.04 In November 2014, a survey of 1,600 households was undertaken across the defined Study Area which comprises 16 separate zones and which stretches some distance beyond the Leicester and Blaby administrative boundaries to incorporate outlying areas. These outlying areas also, to some extent, look to facilities within the two authority areas to meet retail and leisure needs. The Study Area therefore incorporates areas such as Barrow-upon-Soar to the north, Billesdon to the east, Ullesthorpe to the south, and Earl Shilton to the west.

4.05 The Leicester administrative area broadly equates to Study Area Zones 6, 7, 8, 9, 10, 11 and 12 (the latter zone encroaching into Blaby), and the Blaby administrative area incorporates Zone 16 in its entirety, but also parts of Zones 1, 2, 3, 4, 5, 11, 13 and 15. Zone 4 incorporates Blaby town centre, Zone 6 incorporates Leicester city centre and Zone 12 incorporates Fosse Park.

4.06 Table 4.1 below sets out the postcode sectors which comprise each zone and a map of the catchment is provided at Appendix 1. The questions and full tabulation of results from the household survey are provided at Appendix 2.

Table 4.1: Postcodes by Survey Zone

Survey Zone	Postcode Sectors
Zone 1	LE9 4, LE10 0, LE10 2, LE10 3
Zone 2	LE9 3, LE9 7, LE9 9
Zone 3	LE9 6, LE17 5
Zone 4	LE8 4, LE8 5, LE8 6, LE8 8, LE9 1, LE18 3, LE87 2
Zone 5	LE7 3, LE7 9, LE8 0, LE8 9
Zone 6	LE1 1, LE1 2, LE1 3, LE1 4, LE1 5, LE1 6, LE1 7, LE1 9, LE2 0, LE2 1, LE5 3, LE87 4, LE55 7
Zone 7	LE5 0, LE5 4, LE5 5
Zone 8	LE5 1, LE5 2, LE5 6
Zone 9	LE4 5, LE4 6, LE4 7, LE4 9
Zone 10	LE4 0, LE4 1, LE4 2
Zone 11	LE2 2, LE2 3, LE 2 6, LE2 8, LE2 9
Zone 12	LE2 7, LE3 0, LE3 1, LE3 2, LE3 5, LE3 6, LE3 9
Zone 13	LE2 4, LE2 5, LE18 1, LE18 2, LE18 4
Zone 14	LE4 3, LE4 4, LE4 8, LE7 1, LE7 2, LE7 4, LE7 7, LE12 7, LE12 8
Zone 15	LE3 8, LE6 0, LE9 2
Zone 16	LE3 3, LE19 0, LE19 1, LE19 2, LE19 3, LE19 4, LE95 2

4.07 The results of the household survey are utilised to calculate the expenditure claimed by each existing retail facility within the Study Area, a process which is considered in Section 7 of this report.

4.08 The household survey is also of assistance in identifying the market share claimed by specific retail destinations, the frequency of visit to purchase various types of goods, the incidence of linked trips, the most popular means of accessing town centre facilities, the use of other town centre facilities, and so on.

4.09 In considering the market share of trips secured by specific retail destinations, we note that the previous Leicester Retail Study (CACI, April 2008) utilised an entirely different methodology and did not rely on a household survey. In addition, the previous Blaby Retail Study (Roger Tym & Partners, December 2008) adopted a very limited Study Area comprised of very small zones. Paragraph 4.3 of the Blaby Retail Study indicated that its focus is the role and function of the established town and village centres, rather than to assess wider shopping patterns. However, this Study considers shopping patterns over a far greater area and, as a consequence, has adopted larger zones. Our market share analysis utilises the same NEMS dataset that is relied on in assessing quantitative need and therefore our commentary relates to tangible retail destinations only (in other words, expenditure which is committed through the internet and other special forms of trading does not form part of the market share element of the commentary that follows). The analysis that follows relates to the market share of *trips* to undertake particular types of shopping at particular destinations and is not necessarily reflective of the market share of overall Study Area *expenditure* secured by those same destinations.

Food Shopping Patterns

4.10 Tables 4.2 and 4.3 summarise the proportion of main food and 'top up' food shopping trips which are directed to retailers located within the Leicester and Blaby authority areas, based upon the results of the household survey.

4.11 Table 4.2 indicates that foodstores located within the Leicester administrative area currently claim a market share of 42.1% of all main food shopping trips which originate inside the Study Area. The most popular foodstores within Leicester include the Tesco Extra at Hamilton (which secures 7.2% of all trips originating within the Study Area to undertake main food shopping), the Tesco Extra at Bradgate Mall (5.3%), the Asda at Exploration Drive (4.0%), the Morrisons at Counting House Road (2.7%) and the Aldi at Woodgate (2.4%). The Tesco Extra at Hamilton secures more than one in ten trips to undertake main food shopping in five separate zones (these being Zones 5, 6, 7, 8 and 9), which is reflective of it being the largest foodstore in the eastern part of the Leicester administrative area. Whilst the Tesco Extra at Bradgate Mall has a lesser penetration across multiple zones, it does secure the single largest market share of trips in any zone, with 45.0% of all main food shopping trips in Zone 10 being directed to this store.

4.12 As would be expected, the food shopping market share secured by facilities in the Leicester administrative area is significantly higher in the zones which broadly correlate to the Leicester administrative boundary (namely Zones 6, 7, 8, 9, 10, 11 and 12). With the exception of Zone 11 (which generally provides excellent access to the popular Asda at Oadby), each of these zones predominantly look to facilities in Leicester to meet their main food shopping needs and, in Zones 9 and 10, more than three-quarters of all main food shopping trips are directed to facilities in Leicester.

4.13 Table 4.2 also indicates that foodstores located within the Blaby administrative area claim a market share of 16.3% of all main food shopping trips. The most popular foodstores in Blaby include the Asda at Braunstone (which secures 5.2% of all trips originating within the Study Area to undertake main food shopping), the Sainsbury's at Grove Farm Triangle (4.8%) and the Aldi at Welford Road (2.2%). Whilst the Sainsbury's at Grove Farm is the facility in Blaby which secures the highest market share of main food shopping trips in any one zone (with 29.8% of such trips which originate in Zone 16 being directed to the Sainsbury's), the Aldi at Welford Road is by some distance the single most popular foodstore for residents of Zone 4 (securing 22.0% of main food shopping trips originating in this zone).

4.14 Again, as we would expect, those zones which are located within or proximate to the Blaby administrative area most frequently use its food retail facilities to meet their needs. Blaby secures more than a third of all main food shopping trips originating from four zones and attracts 88.4% of all such trips that originate from Zone 16.

Table 4.2a: Principal Main Food Shopping Destinations Trip Analysis by Zone (%)

Zone	Address	1	2	3	4	5	6	7	8
	Leicester								
6.	Leicester city centre	0.0%	7.4%	4.9%	0.8%	6.6%	16.0%	10.0%	5.1%
8.	Tesco Extra, Hamilton	0.0%	0.0%	0.0%	0.0%	17.5%	18.7%	15.5%	41.1%
9.	Asda, Exploration Drive	0.0%	0.0%	3.1%	0.5%	0.0%	12.2%	1.0%	0.0%
	Sainsbury's, Melton Road	0.0%	0.0%	0.0%	0.0%	1.1%	0.7%	1.4%	4.3%
10.	Beaumont Leys	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco Extra, Bradgate Mall	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%
11.	Aldi, Aylestone Road	0.6%	0.0%	0.0%	2.0%	0.0%	0.3%	0.0%	0.0%
12.	Aldi, Woodgate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Morrisons, Counting House Road	0.0%	0.0%	1.0%	0.0%	0.0%	3.5%	1.7%	0.7%
	Leicester Authority Total	0.6%	11.3%	10.0%	4.3%	29.3%	72.1%	66.7%	66.0%
	Blaby								
4.	Aldi, Welford Road	0.0%	0.0%	13.1%	22.0%	0.0%	1.3%	0.0%	0.0%
	Blaby	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%
12.	Asda, Braunstone	6.4%	5.5%	10.0%	13.5%	0.0%	0.5%	1.9%	0.0%
16.	Sainsbury's, Grove Farm Triangle	1.4%	9.5%	6.0%	5.0%	0.0%	0.0%	0.0%	0.0%
	Blaby Authority Total	8.1%	26.1%	34.7%	48.6%	0.9%	3.1%	2.4%	0.0%

Table 4.2b: Principal Main Food Shopping Destinations Trips Analysis by Zone (%)

Zone		9	10	11	12	13	14	15	16	Total
	Leicester									
6.	Leicester city centre	10.1%	6.5%	7.7%	4.6%	0.7%	2.0%	3.6%	3.1%	5.4%
8.	Tesco Extra, Hamilton	20.8%	0.0%	0.0%	0.0%	4.8%	3.3%	0.0%	0.0%	7.2%
9.	Asda, Exploration Drive	5.3%	10.8%	2.7%	11.1%	0.7%	3.0%	0.7%	1.8%	4.0%
	Sainsbury's, Melton Road	19.8%	3.9%	0.0%	0.6%	0.0%	2.2%	2.8%	0.0%	2.3%
10.	Beaumont Leys	0.0%	2.5%	0.0%	0.6%	0.0%	0.0%	3.7%	0.0%	0.3%
	Tesco Extra, Bradgate Mall	1.9%	45.0%	0.7%	8.3%	0.5%	9.2%	13.0%	3.2%	5.3%
11.	Aldi, Aylestone Road	0.0%	0.6%	11.0%	3.4%	1.8%	0.0%	1.1%	0.0%	1.8%
12.	Aldi, Woodgate	0.0%	14.4%	0.0%	12.4%	0.0%	0.8%	1.5%	0.8%	2.4%
	Morrisons, Counting House Road	0.8%	0.0%	9.4%	8.5%	0.9%	0.8%	3.6%	0.8%	2.7%
	Leicester Authority Total	78.4%	89.6%	40.4%	67.1%	10.7%	28.4%	39.3%	14.9%	42.1%
	Blaby									
4.	Aldi, Welford Road	0.0%	0.0%	1.9%	0.0%	1.8%	0.0%	0.0%	7.4%	2.2%
	Blaby	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
12.	Asda, Braunstone	0.0%	1.6%	3.4%	14.2%	2.3%	0.8%	5.8%	18.5%	5.2%
16.	Sainsbury's, Grove Farm Triangle	0.0%	0.6%	7.4%	9.5%	0.7%	0.8%	19.7%	29.8%	4.8%
	Blaby Authority Total	0.0%	4.7%	13.4%	30.3%	4.8%	2.9%	47.7%	78.7%	16.3%

Source: WYG Table 3, Appendix 2

4.15 Top up shopping is often undertaken close to home and, as expected, both Leicester and Blaby claim a very high proportion of such shopping trips which originate in proximity to their shopping facilities. This pattern is replicated elsewhere in the Study Area, with a large proportion of top up food shopping trips being undertaken in the zone in which they originate. The Leicester administrative area claims 44.9% and the Blaby administrative area 12.9% of all top up food shopping trips originating from within the Study Area. As we would expect, large food superstores are generally less able to attract top up food shopping trips from 'far and wide' (as some of them are able to do in respect of main food shopping), but Leicester city centre has an evident role in meeting top up food shopping needs. Leicester city centre is able to attract more than one in five top up shopping trips originating in five zones (these being Zones 6, 9, 10, 11 and 12), which is perhaps reflective of its important role as an employment centre, with nearby food retailers benefitting from purchases made at lunchtime and during the commute home.

4.16 Overall, both the main food shopping and top up shopping market shares secured in zones within and proximate to Leicester and Blaby are considered to generally healthy and where 'leakage' to other destinations is apparent, these facilities are in any event well placed to meet such needs in a sustainable manner (which is exemplified by the way in which the Asda at Oadby helps meet needs that originate in Zones 6, 7 and 11, amongst others).

Table 4.3a: Principal Top Up Food Shopping Destinations Trip Analysis by Zone (%)

Zone	Address	1	2	3	4	5	6	7	8
	Leicester								
6.	Leicester city centre	0.0%	3.3%	0.0%	2.2%	1.6%	43.0%	14.4%	10.2%
8.	Tesco Extra, Hamilton	0.0%	0.0%	0.0%	0.0%	9.5%	0.9%	12.9%	12.4%
9.	Asda, Exploration Drive	0.0%	0.0%	1.2%	0.0%	0.0%	1.4%	0.0%	0.0%
	Sainsbury's, Melton Road	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	1.0%	3.2%
10.	Beaumont Leys	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco Extra, Bradgate Mall								
11.	Aldi, Aylestone Road	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%
12.	Aldi, Woodgate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%
	Morrisons, Counting House Road	0.0%	0.0%	1.5%	0.0%	0.0%	1.4%	0.0%	1.1%
	Leicester Authority Total	0.0%	14.3%	2.7%	4.8%	12.9%	91.6%	82.5%	71.8%
	Blaby								
4.	Aldi, Welford Road	0.0%	0.0%	8.6%	12.9%	0.0%	0.0%	0.0%	0.0%
	Blaby	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%
12.	Asda, Braunstone	0.0%	0.0%	10.1%	1.0%	0.0%	0.0%	0.0%	0.0%
16.	Sainsbury's, Grove Farm Triangle	0.0%	1.7%	2.7%	1.2%	0.0%	0.0%	0.0%	0.0%
	Blaby Authority	11.7%	18.4%	24.9%	51.2%	0.9%	0.0%	0.0%	0.0%

Table 4.3b: Principal Top Up Food Shopping Destinations Trips Analysis by Zone (%)

Zone		9	10	11	12	13	14	15	16	Total
	Leicester									
6.	Leicester city centre	28.1%	21.8%	23.9%	24.4%	0.0%	5.2%	2.9%	1.5%	13.1%
8.	Tesco Extra, Hamilton	8.8%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	2.3%
9.	Asda, Exploration Drive	3.9%	11.8%	7.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%
	Sainsbury's, Melton Road	7.7%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.9%
10.	Beaumont Leys	1.1%	6.1%	0.0%	0.0%	0.0%	0.0%	4.4%	0.0%	0.4%
	Tesco Extra, Bradgate Mall									
11.	Aldi, Aylestone Road	0.0%	0.0%	1.2%	3.1%	2.7%	0.0%	0.0%	0.0%	0.9%
12.	Aldi, Woodgate	0.0%	15.3%	0.0%	3.7%	0.0%	0.0%	2.1%	0.0%	1.2%
	Morrisons, Counting House Road	0.0%	1.1%	7.4%	2.0%	0.0%	1.1%	0.0%	0.0%	1.3%
	Leicester Authority Total	92.6%	82.6%	68.2%	86.8%	12.4%	12.8%	18.6%	6.8%	44.9%
	Blaby									
4.	Aldi, Welford Road	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	10.0%	1.5%
	Blaby	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
12.	Asda, Braunstone	0.0%	0.0%	0.0%	3.1%	0.0%	0.0%	1.7%	2.4%	0.9%
16.	Sainsbury's, Grove Farm Triangle	0.0%	1.1%	1.0%	2.9%	0.0%	0.0%	4.6%	5.7%	1.1%
	Blaby Authority Total	0.0%	6.7%	5.0%	10.6%	0.0%	0.9%	49.1%	88.4%	12.9%

Source: WYG Table 3, Appendix 2

4.17 From scrutiny of the household survey results, we also note the following convenience goods shopping trends.

- The five most dominant stores within the Leicester administrative area cumulatively attract a 21.6% market share of main food shopping trips originating within the Study Area. These stores are: Tesco Extra at Hamilton (7.2%); Tesco Extra at Bradgate Mall (5.3%); Asda at Exploration Drive (4.0%); Morrisons at Counting House Road (2.7%); and, Aldi at Woodgate (2.4%).
- The five most dominant stores within the Blaby administrative area cumulatively attract a 14.5% market share of main food shopping trips originating within the Study Area. These stores are: Asda at Narborough Road South (5.2%); Sainsbury's at Grove Farm Triangle (4.3%); Aldi at Welford Road (2.2%); Aldi at Meridian Way (1.4%); and, Co-opertive Foodstore at Glenfield (0.9%).
- Approaching four out of every ten surveyed (38.7%) indicated that the principal reason for choosing their main food shopping destination was the store's proximity to their home, followed by the fact that the store offers low prices or represents good value (23.1%) and then due to the quality of goods available (6.8%).

- Almost four out of every five shoppers (78.7%) do their main food shop once a week or more frequently, with 12.0% undertaking main food shopping at least once a fortnight and 7.5% doing such shopping on a monthly basis or less frequently.
- Just 4.6% of respondents suggested that their last main food shop was undertaken via the internet.
- A large majority of respondents use the car in travelling to do their main food shop (84.9%), with the next most popular means of transport being by foot (9.3%) and then by bus (4.0%).
- More than half of respondents (66.2%) do not link their main food shopping trip with any other activity, with the most popular activities of those that do being the undertaking of non-food shopping (6.8%), travelling to and from work (5.4%) and undertaking other food shopping (4.9%).
- In terms of top up food shopping, given the relatively extensive reach of the Study Area, a very large number of stores have been identified as attracting top up food shopping expenditure. There are 10 stores within the Leicester administrative area and three stores within the Blaby administrative area which each claim more than a 1.0% market share of top up food shopping trips which originate from within the Study Area. In Leicester, these stores are: Tesco Extra at Hamilton (2.3%); Asda at Exploration Drive (1.5%); Lidl at Gipsy Lane (1.4%); Morrisons at Counting House Road (1.3%); Aldi at Woodgate (1.2%); Tesco at Narborough Road Retail Park (1.2%); Sainsbury's at Humberstone Gate in Leicester city centre (1.1%); Tesco Express at Saffron Lane (1.1%); M&S Foodhall at Gallowtree Gate in Leicester city centre (1.0%); and Tesco Extra at Bradgate Mall (1.0%). In Blaby, these stores are: Aldi at Welford Lane (1.5%); Aldi at Meridian Way (1.2%); and Sainsbury's at Grove Farm Triangle (1.1%).
- As would be expected, the household survey indicates that top up shopping trips tend to be undertaken on a more frequent basis than main food shopping trips, with 8.1% of respondents undertaking such shopping trips on a daily basis, 40.1% at least twice weekly and 35.0% at least weekly.

Conclusions in Respect of Convenience Goods Shopping Patterns

4.18 In considering convenience goods shopping patterns in the Study Area, it is of some relevance to compare the percentage of overall journeys attracted to each authority area with the percentage of the Study Area population that resides in that authority area. In this regard, Experian MMG3 data indicates that the population of the Leicester administrative area at 2015 is 337,978 and that the population of the Blaby administrative area at 2015 is 96,034. The Leicester and Blaby populations respectively equate to 48.0% and 13.6% of the overall Study Area population. Accordingly, it might be expected – given that shoppers typically seek to use food shopping facilities close to home – that Leicester's and Blaby's food retail facilities would gain a similar market share of overall trips.

4.19 In this regard, we note that the Leicester administrative area secures a market share of 42.1% of all main food shopping trips that originate within the Study Area and the Blaby administrative area secures a market share of 16.3% of such trips. Accordingly, Leicester secures fewer main food shopping trips than we might expect and Blaby secures slightly more. With regard to Leicester, this is a consequence of there being a number of large food superstores located outside the Leicester administrative boundary but in close enough proximity to cater for the needs of its residents. Such stores include the Asda at Sainsbury's at Grove Farm Triangle (in Blaby), the Asda at Barkby Thorpe Lane (in Charnwood) and the Asda at Leicester Road (in Oadby).

4.20 Clearly, the drawing of local authority boundaries is largely immaterial to customers making decisions about where to shop. Accordingly, given the proximity of large food superstores to the Leicester administrative boundary (which are accessible to parts of the wider Leicester conurbation), the market share secured by the Leicester administrative area is considered to be reasonable. However, we would suggest that it is monitored in the future and that, subject to appropriate proposals coming forward in the future, there may be an opportunity to improve it slightly.

4.21 In respect of top up food shopping, Leicester secures a market share of 44.9% of all main food shopping trips that originate within the Study Area and Blaby secures a market share of 12.9% of such trips. Accordingly, the market shares for this type of shopping trips more closely align with the proportion of Study Area population accommodated within each authority area.

Comparison Goods Shopping Patterns: Clothing

4.22 As Table 4.4 demonstrates, Leicester city centre is the single most popular destination for clothes shopping in the Study Area, attracting almost half of all such trips (48.5%) which originate in the Study Area. Whilst the popularity of Leicester city centre is directly proportionate to how centrally located a zone is, the city centre secures more than four in every 10 trips to purchase clothing and footwear which originate within 10 of the 16 zones. Moreover, Leicester city centre is the single most popular destination to undertake such shopping in 13 of the 16 zones. In Zones 6, 7 and 8 (which represent the central and eastern part of the Leicester administrative area), the city centre secures between 71.5% and 88.7% of all trips to purchase clothing and footwear. Accordingly, the household survey affirms the important sub-regional role of Leicester city centre and is reflective of the range and choice of such goods offered in the city centre.

4.23 The second most popular destination for clothing and footwear shopping is Fosse Park and Grove Farm Triangle[30]. Fosse Park secures more than three out of 10 clothing and footwear trips in eight of the 16 zones, and secures an overall market share of 25.6% of all such trips which originate within the Study Area. Accordingly, it is evident that Leicester city centre and Fosse Park are the dominant destinations for clothing and footwear shopping trips across the Study Area as a whole.

Table 4.4a: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Clothing and Footwear (%)

Zone	Address	1	2	3	4	5	6	7	8
	Leicester								
6.	Leicester city centre	27.9%	33.8%	13.3%	29.9%	52.4%	88.7%	73.3%	71.5%
	St George's Retail Park	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
8.	Hamilton district centre	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	3.0%	2.2%
10.	Abbey Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	B&Q, Devonshire Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Beaumont Leys	0.0%	5.0%	0.0%	0.0%	0.0%	0.9%	0.0%	4.3%
12.	Homebase, Welford Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Leicester Authority Total	28.6%	38.7%	13.3%	29.9%	52.4%	91.4%	78.0%	78.0%
	Blaby								
4.	Blaby town centre	0.0%	0.0%	0.0%	1.4%	0.0%	1.4%	0.0%	0.0%
16.	Fosse Park and Grove Farm Triangle	25.0%	46.9%	63.4%	46.4%	16.6%	5.8%	6.0%	11.1%
	Blaby Authority Total	25.0%	47.6%	63.4%	50.2%	17.8%	7.2%	6.0%	11.1%
	Other Authority Areas								
1.	Hinckley	10.5%	7.3%	5.9%	0.0%	0.0%	0.0%	0.0%	0.0%
13.	Oadby	0.0%	0.0%	0.0%	3.1%	0.8%	1.4%	1.2%	0.9%
	Wigston	0.0%	0.0%	0.0%	5.5%	0.0%	0.0%	1.2%	0.0%
OSA	Giltbrook Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Loughborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Market Harborough	0.0%	0.7%	0.0%	2.2%	11.2%	0.0%	0.6%	1.8%
	Nuneaton	15.8%	0.7%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%

[30] We have grouped Fosse Park and Grove Farm Triangle together for the assessment of comparison goods shopping patterns due to their close proximity and ability to act as part of the same wider destination. We abbreviate the destination to 'Fosse Park' in the remainder of this section of the report

Table 4.4b: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Clothing and Footwear (%)

Zone	Address	9	10	11	12	13	14	15	16	Total
	Leicester									
6.	Leicester city centre	62.0%	55.1%	48.4%	46.3%	45.4%	36.6%	40.7%	32.9%	48.5%
	St George's Retail Park	0.0%	1.6%	0.0%	0.7%	0.0%	0.0%	2.9%	0.0%	0.3%
8.	Hamilton district centre	10.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
10.	Abbey Retail Park	1.1%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.2%
	B&Q, Devonshire Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Beaumont Leys	2.5%	24.0%	0.6%	12.4%	0.0%	4.9%	6.0%	3.3%	4.2%
12.	Homebase, Welford Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Leicester Authority Total	80.6%	80.6%	49.0%	60.4%	45.4%	41.5%	49.6%	36.2%	54.6%
	Blaby									
4.	Blaby town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
16.	Fosse Park and Grove Farm Triangle	8.1%	13.1%	35.3%	31.4%	32.3%	15.0%	39.9%	52.3%	25.6%
	Blaby Authority Total	8.1%	13.1%	35.3%	32.7%	33.4%	15.0%	41.4%	57.1%	26.5%
	Other Authority Areas									
1.	Hinckley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%
13.	Oadby	0.0%	0.0%	0.6%	0.0%	0.5%	0.0%	0.0%	0.0%	0.5%
	Wigston	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	1.0%	0.6%
OSA	Giltbrook Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Loughborough	0.6%	1.3%	0.0%	0.0%	0.0%	13.9%	0.0%	0.0%	1.7%
	Market Harborough	0.0%	0.0%	0.0%	0.0%	1.1%	0.6%	0.0%	0.7%	0.9%
	Nuneaton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%

Source: WYG Table 9, Appendix 2

4.24 The only other destinations within Leicester or Blaby which secure more than 1.0% of overall trips to undertake clothing and footwear shopping across the Study Area are Beaumont Leys town centre and Hamilton district centre, which respectively claim 4.2% and 1.0% of trips to purchase such goods.

4.25 Considering the performance of each of the authority areas, facilities within the Leicester administrative area claim 54.6% of all shopping trips to purchase clothing and footwear which originate within the Study Area and facilities within the Blaby administrative area claim 26.5% of all such trips.

Comparison Goods Shopping Patterns: Books, CDs and DVDs

4.26 Table 4.5 identifies that shopping patterns relating to the purchase of books, CDs and DVDs are broadly similar to those for clothing and footwear goods. Leicester city centre again attracts almost half (49.1%) of all such trips which originate within the Study Area. The city centre secures more than four in every 10 trips to purchase clothing and footwear which originate within 11 of the 16 zones and is the most popular destination to undertake such shopping in 13 of the 16 zones.

4.27 The second most popular destination to purchase books, CDs and DVDs is again Fosse Park. However, as we would anticipate, Fosse Park secures a lesser overall market share of trips to purchase books, CDs and DVDs than it does clothing and footwear, which is broadly reflective of the types of retailer which it accommodates. Fosse Park secures 12.4% of all shopping trips to purchase books, CDs and DVDs which originate within the Study Area.

4.28 In respect of the performance of each authority area, Table 4.5 identifies that facilities within the Leicester administrative area claim 57.2% of all shopping trips to purchase book, CDs and DVDs which originate within the Study Area and facilities within the Blaby administrative area claim 15.9% of all such trips.

Table 4.5a: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Books, CDs, DVDs and so on (%)

Zone	Address	1	2	3	4	5	6	7	8
	Leicester								
6.	Leicester city centre	16.5%	28.6%	26.6%	14.4%	44.7%	93.1%	69.0%	72.0%
	St George's Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
8.	Hamilton district centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.7%	14.8%
10.	Abbey Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	B&Q, Devonshire Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Beaumont Leys	0.0%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%
12.	Homebase, Welford Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Leicester Authority Total	16.5%	38.7%	26.6%	14.4%	48.1%	93.1%	82.7%	92.2%
	Blaby								
4.	Blaby town centre	0.0%	0.0%	0.0%	10.5%	0.0%	0.0%	0.0%	0.0%
16.	Fosse Park and Grove Farm Triangle	1.7%	21.4%	44.0%	34.0%	0.0%	7.0%	0.0%	0.0%
	Blaby Authority Total	14.3%	24.7%	44.0%	52.3%	0.0%	7.0%	0.0%	0.0%
	Other Authority Areas								
1.	Hinckley	42.6%	25.3%	7.5%	0.0%	0.0%	0.0%	0.0%	0.0%
13.	Oadby	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.8%	1.9%
	Wigston	0.0%	0.0%	4.1%	5.5%	0.0%	0.0%	0.0%	0.0%
OSA	Giltbrook Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Loughborough	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%
	Market Harborough	0.0%	0.0%	2.3%	4.9%	22.7%	0.0%	0.0%	3.9%
	Nuneaton	19.4%	3.3%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%

Table 4.5b: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Books, CDs, DVDs and so on (%)

Zone	Address	9	10	11	12	13	14	15	16	Total
	Leicester									
6.	Leicester city centre	57.9%	53.0%	74.9%	53.0%	41.0%	30.4%	58.6%	43.6%	49.1%
	St George's Retail Park	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
8.	Hamilton district centre	3.0%	0.0%	0.0%	0.0%	1.5%	1.9%	0.0%	0.0%	2.1%
10.	Abbey Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	B&Q, Devonshire Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Beaumont Leys	4.7%	32.0%	0.0%	15.7%	0.0%	7.6%	12.9%	0.0%	5.1%
12.	Homebase, Welford Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Leicester Authority Total	69.7%	85.0%	74.9%	68.7%	42.5%	39.9%	71.5%	43.6%	57.2%
	Blaby									
4.	Blaby town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.6%
16.	Fosse Park and Grove Farm Triangle	3.0%	10.8%	16.5%	22.9%	8.5%	5.7%	20.4%	40.8%	12.4%
	Blaby Authority Total	3.0%	10.8%	19.0%	25.0%	11.6%	7.6%	20.4%	50.2%	15.9%
	Other Authority Areas									
1.	Hinckley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	5.3%
13.	Oadby	0.0%	0.0%	3.0%	0.0%	3.8%	0.0%	0.0%	1.8%	1.0%
	Wigston	1.7%	0.0%	1.6%	3.1%	6.6%	0.0%	0.0%	0.0%	1.3%
OSA	Giltbrook Retail Park	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.3%
	Loughborough	0.0%	0.0%	0.0%	0.0%	0.0%	28.6%	2.9%	0.0%	3.4%
	Market Harborough	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	2.7%	1.8%
	Nuneaton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%

Source: WYG Table 11, Appendix 2

Comparison Goods Shopping Patterns: Small Household Goods

4.29 Table 4.6 below identifies that Leicester city centre attracts 39.9% of shopping trips to purchase small household goods (including such items as tableware, household utensils, jewellery, watches and appliances for personal care) which originate from within the Study Area. The city centre secures more than four in every 10 trips to purchase small household goods which originate within six of the 16 zones and is the most popular destination to undertake such shopping in nine of the 16 zones.

4.30 The second most popular destination to purchase small household goods is once more Fosse Park, which secures 22.1% of all such shopping trips which originate within the Study Area. Fosse Park secures more than three out of 10 small household goods trips in six of the 16 zones, which is reflective of its relatively strong household goods offer.

4.31 Other popular destinations to shop for small household goods include large food superstores, reflecting the wide household product range typically carried by such stores. Given the number of retailers which now sell a wide range of household goods, the market share claimed by Leicester city centre in particular is considered to be encouraging and reflective of the relative strength of the offer provided by city centre operators.

4.32 In terms of the performance of each authority area, Table 4.6 identifies that facilities within the Leicester administrative area claim 39.9% of all shopping trips to purchase small household goods which originate within the Study Area and facilities within the Blaby administrative area claim 23.5% of all such trips.

Table 4.6a: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Small Household Goods (%)

Zone	Address	1	2	3	4	5	6	7	8
	Leicester								
6.	Leicester city centre	13.2%	11.9%	25.9%	17.9%	55.6%	55.1%	64.8%	46.6%
	St George's Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	1.0%	0.0%
8.	Hamilton district centre	0.0%	0.0%	0.0%	0.0%	2.0%	1.3%	4.7%	4.5%
10.	Abbey Retail Park	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%
	B&Q, Devonshire Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Beaumont Leys	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%
12.	Homebase, Welford Road	0.0%	0.0%	0.0%	1.5%	0.0%	0.9%	1.8%	0.0%
	Leicester Authority Total	13.2%	16.4%	27.5%	19.4%	57.6%	61.6%	78.7%	51.1%
	Blaby								
4.	Blaby town centre	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%
16.	Fosse Park and Grove Farm Triangle	22.1%	33.2%	36.7%	39.7%	8.1%	7.2%	10.8%	15.0%
	Blaby Authority Total	22.1%	33.2%	36.7%	45.2%	9.4%	8.8%	10.8%	15.0%
	Other Authority Areas								
1.	Hinckley	39.6%	23.0%	5.0%	0.0%	0.0%	0.0%	0.0%	0.0%
13.	Oadby	0.0%	0.0%	0.0%	5.4%	5.1%	0.0%	1.0%	6.4%
	Wigston	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	3.4%
OSA	Giltbrook Retail Park	1.1%	0.0%	2.9%	3.9%	2.4%	10.7%	1.5%	5.7%
	Loughborough	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Market Harborough	0.0%	0.0%	0.0%	5.7%	1.3%	0.0%	1.8%	0.0%
	Nuneaton	8.8%	3.0%	2.9%	0.0%	0.0%	9.4%	0.0%	0.0%

Table 4.6b: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Small Household Goods (%)

Zone	Address	9	10	11	12	13	14	15	16	Total
	Leicester									
6.	Leicester city centre	49.4%	39.8%	40.4%	31.5%	28.8%	15.1%	21.0%	12.9%	31.3%
	St George's Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%	0.0%	0.3%
8.	Hamilton district centre	1.5%	0.0%	1.2%	0.0%	1.3%	0.0%	0.0%	0.0%	0.8%
10.	Abbey Retail Park	0.0%	0.0%	0.0%	1.5%	1.7%	0.9%	1.2%	1.3%	0.6%
	B&Q, Devonshire Road	0.0%	0.0%	2.0%	3.7%	0.0%	1.5%	0.0%	3.2%	1.1%
	Beaumont Leys	7.6%	26.2%	0.0%	9.1%	0.8%	0.9%	8.5%	0.0%	3.4%
12.	Homebase, Welford Road	0.0%	0.0%	7.5%	1.0%	4.0%	0.0%	0.0%	0.0%	1.4%
	Leicester Authority Total	61.1%	69.0%	51.2%	47.7%	36.6%	19.7%	35.1%	17.4%	39.9%
	Blaby									
4.	Blaby town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
16.	Fosse Park and Grove Farm Triangle	10.6%	3.4%	20.0%	32.9%	19.5%	7.4%	37.6%	59.5%	22.1%
	Blaby Authority Total	10.6%	3.4%	20.0%	33.9%	19.5%	10.3%	41.5%	64.9%	23.5%
	Other Authority Areas									
1.	Hinckley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	4.2%
13.	Oadby	0.0%	0.0%	6.6%	0.0%	3.2%	0.0%	0.0%	0.0%	1.6%
	Wigston	1.0%	0.0%	3.5%	0.0%	20.2%	0.0%	0.0%	0.8%	2.2%
OSA	Giltbrook Retail Park	1.8%	6.5%	0.8%	6.6%	1.3%	16.8%	9.7%	4.4%	5.6%
	Loughborough	0.0%	2.6%	0.0%	0.0%	0.0%	16.4%	1.2%	0.0%	2.5%
	Market Harborough	0.0%	0.0%	2.7%	0.0%	1.3%	1.3%	0.0%	2.1%	1.1%
	Nuneaton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%

Source: WYG Table 13, Appendix 2

Comparison Goods Shopping Patterns: Toys, Games, Bicycles and Recreation Goods

4.33 Table 4.7 identifies that Leicester city centre secures 33.1% of all shopping trips to purchase toys, games, bicycles and similar items which originate within the Study Area and that the nearby St George's retail park secures 20.3% of such trips. These two destinations are generally the dominant locations for this type of shopping activity across most of the Study Area zones. The city centre secures more than four in every 10 trips to purchase toys, games, bicycles and similar items which originate within three of the 16 zones. This is a lower number than for other non-bulky comparison goods categories and is reflective of the fact that recreation goods are often bought at retail parks and other out of centre superstores.

4.34 Fosse Park is the third most popular destination to undertake such shopping. It secures 15.6% of all shopping trips to purchase toys, games, bicycles and similar items which originate within the Study Area. In addition, Fosse Park attracts more than three out of 10 trips for recreational goods in three of the 16 zones.

4.35 In respect of the performance of each authority area, Table 4.7 identifies that facilities within the Leicester administrative area claim 63.9% of all shopping trips to purchase toys, games, bicycles and similar items which originate within the Study Area and facilities within the Blaby administrative area claim 17.5% of all such trips.

Table 4.7a: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Toys, Games, Bicycles and Recreation Goods (%)

Zone	Address	1	2	3	4	5	6	7	8
	Leicester								
6.	Leicester city centre	17.5%	20.9%	10.2%	24.9%	26.1%	75.2%	36.5%	40.3%
	St George's Retail Park	0.0%	21.4%	9.8%	9.3%	6.5%	20.8%	34.1%	40.2%
8.	Hamilton district centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.9%	7.5%
10.	Abbey Retail Park	0.0%	0.0%	3.2%	0.0%	0.0%	0.0%	1.3%	0.0%
	B&Q, Devonshire Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Beaumont Leys	0.0%	5.5%	0.0%	0.0%	13.6%	0.0%	0.0%	0.0%
12.	Homebase, Welford Road	0.0%	0.0%	0.0%	2.6%	0.0%	1.1%	0.0%	0.0%
	Leicester Authority Total	17.5%	53.2%	23.2%	36.9%	46.1%	98.2%	76.7%	88.0%
	Blaby								
4.	Blaby town centre	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%
16.	Fosse Park and Grove Farm Triangle	9.4%	13.1%	52.1%	43.3%	17.7%	1.1%	16.5%	0.0%
	Blaby Authority Total	9.4%	13.1%	58.8%	51.8%	20.7%	1.1%	18.8%	0.0%
	Other Authority Areas								
1.	Hinckley	55.9%	21.4%	4.9%	0.0%	0.0%	0.0%	0.0%	0.0%
13.	Oadby	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Wigston	0.0%	0.0%	0.0%	8.8%	0.0%	0.0%	0.0%	0.0%
OSA	Giltbrook Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Loughborough	0.0%	0.0%	0.0%	0.0%	10.0%	0.0%	0.0%	3.0%
	Market Harborough	0.0%	0.0%	0.0%	0.0%	8.9%	0.0%	0.0%	0.0%
	Nuneaton	1.1%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Table 4.7b: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Toys, Games, Bicycles and Recreation Goods (%)

Zone	Address	9	10	11	12	13	14	15	16	Total
	Leicester									
6.	Leicester city centre	32.6%	36.1%	55.1%	37.2%	16.9%	13.9%	20.9%	21.0%	33.1%
	St George's Retail Park	26.1%	24.6%	13.7%	25.4%	40.4%	16.7%	17.9%	0.0%	20.3%
8.	Hamilton district centre	7.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
10.	Abbey Retail Park	0.0%	3.6%	2.0%	4.7%	0.0%	2.6%	2.3%	0.0%	1.5%
	B&Q, Devonshire Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Beaumont Leys	8.5%	33.4%	0.0%	5.9%	0.0%	23.6%	13.3%	0.0%	6.2%
12.	Homebase, Welford Road	0.0%	0.0%	0.0%	0.0%	4.6%	0.0%	0.0%	6.3%	0.8%
	Leicester Authority Total	77.5%	97.7%	75.8%	73.3%	61.8%	56.8%	54.3%	27.3%	63.9%
	Blaby									
4.	Blaby town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
16.	Fosse Park and Grove Farm Triangle	14.3%	0.0%	20.3%	23.7%	8.7%	0.0%	20.9%	62.7%	15.6%
	Blaby Authority Total	14.3%	0.0%	20.3%	26.8%	13.3%	0.0%	28.9%	65.2%	17.5%
	Other Authority Areas									
1.	Hinckley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.6%
13.	Oadby	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.1%
	Wigston	0.0%	0.0%	1.3%	0.0%	3.0%	0.0%	0.0%	0.0%	0.8%
OSA	Giltbrook Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.3%
	Loughborough	0.0%	0.0%	0.0%	0.0%	12.6%	34.4%	3.5%	2.5%	5.7%
	Market Harborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
	Nuneaton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%

Source: WYG Table 15, Appendix 2

Comparison Goods Shopping Patterns: Chemist Goods

4.36 Chemist goods are typically purchased in a similar manner to convenience items, with a large proportion of such trips taking place close to home (due principally to the similar nature of many such goods which reduces the propensity to 'shop around'). Accordingly, a wide range of facilities attract such shopping journeys, including defined centres, but also food superstores and standalone pharmacists. In this context, whilst Leicester city centre has a more limited market share of chemist goods when compared to most other non-bulky comparison goods categories, its performance is considered to be reflective of how such purchases are generally made and does not give cause for concern.

4.37 Table 4.8 identifies that Leicester city centre secures 32.1% of all shopping trips to purchase chemist goods. By way of contrast, the nearby St George's Retail Park secures just 0.7% of such trips. The city centre secures more than four in every 10 trips to purchase chemist goods which originate within five of the 16 zones.

4.38 Fosse Park is the second most popular destination to undertake such shopping. It secures 15.8% of all shopping trips to purchase chemist goods which originate within the Study Area. Fosse Park attracts more than three out of 10 trips to purchase chemist goods in four of the 16 zones.

4.39 In respect of the performance of each authority area, Table 4.8 identifies that facilities within the Leicester administrative area claim 45.0% of all shopping trips to purchase chemist goods which originate within the Study Area and facilities within the Blaby administrative area claim 15.8% of all such trips.

Table 4.8a: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Chemist Goods (%)

Zone	Address	1	2	3	4	5	6	7	8
	Leicester								
6.	Leicester city centre	4.2%	12.0%	5.8%	11.2%	34.8%	82.9%	62.1%	39.0%
	St George's Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%	0.9%	0.0%
8.	Hamilton district centre	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%	10.5%	15.2%
10.	Abbey Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	B&Q, Devonshire Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Beaumont Leys	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	1.4%	1.6%
12.	Homebase, Welford Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Leicester Authority Total	4.2%	18.9%	5.8%	11.2%	40.5%	93.8%	89.1%	69.7%
	Blaby								
4.	Blaby town centre	0.0%	0.0%	1.0%	15.9%	0.0%	0.0%	0.0%	0.0%
16.	Fosse Park and Grove Farm Triangle	5.4%	28.9%	30.3%	28.2%	4.9%	4.4%	2.8%	3.4%
	Blaby Authority Total	13.1%	34.0%	31.3%	57.3%	11.3%	4.4%	2.8%	3.4%
	Other Authority Areas								
1.	Hinckley	71.7%	20.5%	6.0%	0.0%	0.0%	0.0%	0.0%	0.9%
13.	Oadby	0.0%	0.0%	0.0%	4.2%	3.6%	0.6%	5.8%	11.1%
	Wigston	0.0%	0.0%	2.0%	18.5%	0.7%	0.0%	0.0%	0.0%
OSA	Giltbrook Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Loughborough	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%
	Market Harborough	0.0%	0.0%	1.0%	3.6%	10.5%	0.0%	0.9%	0.0%
	Nuneaton	3.9%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%

Table 4.8b: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Chemist Goods (%)

Zone	Address	9	10	11	12	13	14	15	16	Total
	Leicester									
6.	Leicester city centre	34.2%	41.5%	41.3%	49.4%	19.9%	16.1%	18.7%	19.6%	32.1%
	St George's Retail Park	0.0%	0.0%	2.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.7%
8.	Hamilton district centre	11.3%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	2.4%
10.	Abbey Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	B&Q, Devonshire Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Beaumont Leys	2.3%	45.9%	0.0%	7.6%	0.0%	4.0%	8.1%	1.9%	0.0%
12.	Homebase, Welford Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Leicester Authority Total	72.3%	90.6%	51.4%	65.5%	22.8%	24.9%	26.8%	24.4%	45.0%
	Blaby									
4.	Blaby town centre	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
16.	Fosse Park and Grove Farm Triangle	5.9%	5.1%	17.4%	31.0%	13.5%	5.1%	35.2%	57.1%	15.8%
	Blaby Authority Total	5.9%	5.1%	20.2%	34.5%	13.5%	15.5%	59.6%	72.1%	22.2%
	Other Authority Areas									
1.	Hinckley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.4%
13.	Oadby	0.0%	0.0%	17.7%	0.0%	20.7%	0.0%	0.0%	0.0%	4.4%
	Wigston	0.0%	0.0%	4.3%	0.0%	30.8%	0.0%	0.0%	0.9%	3.7%
OSA	Giltbrook Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Loughborough	0.0%	0.0%	0.0%	0.0%	0.8%	21.5%	0.7%	0.0%	2.9%
	Market Harborough	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
	Nuneaton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%

Source: WYG Table 17, Appendix 2

Comparison Goods Shopping Patterns: Electrical

4.40 As one would expect, Leicester city centre is significantly less of a draw for those purchasing bulky goods. Table 4.9 identifies that Leicester city centre secures 27.9% of all shopping trips to electrical goods, which compares to the 36.1% market share claimed by Fosse Park. Fosse Park is the most popular destination for such purchases in nine zones (these being Zones 1, 2, 3, 4, 11, 12, 13, 15 and 16) and Leicester city centre is the most popular destination for such purchases in six zones (Zones 5, 7, 8, 9, 10 and 14).

4.41 The city centre secures more than four in every 10 trips to purchase electrical goods in only the central Zones 6 and 7. By way of contrast, Fosse Park secures more than four out of every 10 trips to purchase electrical goods which originate within seven of the 16 zones. The two destinations evidently account for the vast majority of electrical goods purchases and the next most popular destinations, St George's Retail Park and Beaumont Leys town centre, respectively claim 7.5% and 5.6% of all such shopping trips which originate within the Study Area.

4.42 In respect of the performance of each authority area, Table 4.9 identifies that facilities within the Leicester administrative area claim 45.2% of all shopping trips to purchase electrical goods which originate within the Study Area and facilities within the Blaby administrative area claim 38.1% of all such trips.

Table 4.9a: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Electrical Goods (%)

Zone	Address	1	2	3	4	5	6	7	8
	Leicester								
6.	Leicester city centre	17.2%	15.0%	10.3%	18.4%	29.1%	57.6%	48.0%	34.5%
	St George's Retail Park	6.9%	0.0%	0.0%	0.0%	7.8%	21.6%	27.7%	11.8%
8.	Hamilton district centre	0.0%	0.0%	0.0%	1.1%	4.0%	5.8%	5.8%	23.0%
10.	Abbey Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	B&Q, Devonshire Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Beaumont Leys	1.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%
12.	Homebase, Welford Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Leicester Authority Total	25.0%	19.2%	10.3%	19.5%	41.9%	84.9%	81.4%	73.9%
	Blaby								
4.	Blaby town centre	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%
16.	Fosse Park and Grove Farm Triangle	35.3%	52.4%	70.0%	63.6%	23.3%	7.3%	15.2%	12.5%
	Blaby Authority Total	35.3%	55.1%	70.0%	71.1%	25.3%	8.2%	15.2%	12.5%
	Other Authority Areas								
1.	Hinckley	27.4%	14.1%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
13.	Oadby	0.0%	0.0%	0.0%	0.0%	3.8%	0.0%	2.2%	5.9%
	Wigston	0.0%	0.0%	1.0%	6.5%	3.5%	0.0%	0.0%	6.2%
OSA	Giltbrook Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Loughborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%
	Market Harborough	0.0%	0.0%	0.0%	0.0%	9.1%	0.0%	0.0%	0.0%
	Nuneaton	7.8%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Table 4.9b: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Electrical Goods (%)

Zone	Address	9	10	11	12	13	14	15	16	Total
	Leicester									
6.	Leicester city centre	35.8%	27.2%	32.1%	28.3%	16.0%	27.2%	23.4%	10.0%	27.9%
	St George's Retail Park	30.2%	11.7%	5.0%	0.0%	1.6%	2.6%	2.5%	0.8%	7.5%
8.	Hamilton district centre	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%
10.	Abbey Retail Park	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
	B&Q, Devonshire Road	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.1%
	Beaumont Leys	6.0%	31.1%	0.0%	7.9%	0.0%	12.9%	15.0%	2.2%	5.6%
12.	Homebase, Welford Road	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
	Leicester Authority Total	82.7%	70.0%	40.9%	42.6%	17.6%	45.3%	40.8%	13.0%	45.2%
	Blaby									
4.	Blaby town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
16.	Fosse Park and Grove Farm Triangle	15.0%	24.6%	54.6%	55.5%	42.6%	11.1%	37.5%	82.1%	36.1%
	Blaby Authority Total	15.9%	27.3%	56.3%	56.5%	43.5%	12.7%	50.8%	84.1%	38.1%
	Other Authority Areas									
1.	Hinckley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	2.7%
13.	Oadby	0.0%	0.0%	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	0.7%
	Wigston	0.0%	0.0%	0.0%	0.9%	9.7%	0.0%	0.0%	1.4%	1.7%
OSA	Giltbrook Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Loughborough	0.0%	0.0%	0.0%	0.0%	0.0%	15.5%	0.0%	0.0%	2.0%
	Market Harborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
	Nuneaton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%

Source: WYG Table 19, Appendix 2

Comparison Goods Shopping Patterns: DIY

4.43 DIY goods are typically purchased at out of centre locations and Leicester city centre's market share of DIY goods shopping trips – equating to 7.9% of all such trips across the Study Area – is broadly consistent with our expectations.

4.44 By far the most popular destination for DIY shopping in the Study Area is the B&Q at Devonshire Road which attracts very nearly a third of DIY goods shopping trips which originate within the Study Area. The B&Q at Devonshire Road is located in Zone 10 to the north of Leicester city centre and secures a very high market share of DIY shopping trips from proximate zones (it attracts 71.0% of such trips from Zone 10, 69.2% of such trips from Zone 9 and 66.3% of such trips from Zone 12).

4.45 Other popular destinations principally comprise standalone specialist DIY stores and include the B&Q at Bull Head Street in Wigston (attracting 11.6% of DIY shopping journeys which originate in the

Study Area), the B&Q at Jubilee Drive in Loughborough (6.5%) and the Homebase at Welford Road in Leicester (6.0%).

4.46 With regard to the performance of each authority area, Table 4.10 identifies that facilities within the Leicester administrative area claim 55.3% of all shopping trips to purchase DIY goods which originate within the Study Area and facilities within the Blaby administrative area claim 6.2% of all such trips. This is reflective of the relative paucity in DIY retail provision in Blaby. However, this is not considered particularly problematic as such purchases are generally relatively infrequent and most Blaby residents are able to access nearby facilities in adjacent local authority areas.

Table 4.10a: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – DIY Goods (%)

Zone	Address	1	2	3	4	5	6	7	8
	Leicester								
6.	Leicester city centre	0.0%	0.0%	1.2%	1.2%	6.8%	32.0%	24.1%	10.2%
	St George's Retail Park	0.0%	0.7%	0.0%	0.9%	12.4%	17.2%	10.7%	4.2%
8.	Hamilton district centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	4.2%
10.	Abbey Retail Park	0.0%	0.0%	3.5%	0.0%	0.0%	2.3%	2.5%	0.0%
	B&Q, Devonshire Road	0.0%	15.8%	8.6%	11.1%	17.1%	31.9%	19.2%	39.3%
	Beaumont Leys	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
12.	Homebase, Welford Road	0.0%	0.0%	1.0%	9.3%	2.5%	12.4%	27.2%	1.5%
	Leicester Authority Total	0.0%	17.6%	14.3%	22.5%	42.8%	99.1%	91.9%	74.1%
	Blaby								
4.	Blaby town centre	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	1.5%
16.	Fosse Park and Grove Farm Triangle	0.0%	1.1%	1.2%	2.1%	0.0%	0.0%	0.0%	2.7%
	Blaby Authority Total	7.4%	27.7%	2.9%	11.1%	5.0%	0.0%	4.2%	13.2%
	Other Authority Areas								
1.	Hinckley	11.4%	4.7%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%
13.	Oadby	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	2.5%	0.0%
	Wigston	0.0%	0.0%	0.0%	1.2%	1.0%	0.0%	0.0%	2.3%
OSA	Giltbrook Retail Park	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%
	Loughborough	0.0%	1.1%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%
	Market Harborough	0.0%	0.0%	1.2%	0.9%	4.5%	0.0%	0.0%	0.0%
	Nuneaton	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Table 4.10b: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – DIY Goods (%)

Zone	Address	9	10	11	12	13	14	15	16	Total
	Leicester									
6.	Leicester city centre	18.2%	10.1%	18.2%	5.6%	1.8%	0.0%	2.7%	8.8%	7.9%
	St George's Retail Park	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	4.7%	0.0%	2.2%
8.	Hamilton district centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
10.	Abbey Retail Park	7.9%	0.0%	0.0%	2.2%	1.2%	0.0%	3.2%	0.0%	1.3%
	B&Q, Devonshire Road	69.2%	71.0%	20.1%	66.3%	16.8%	25.3%	64.9%	43.5%	33.1%
	Beaumont Leys	0.0%	10.8%	0.0%	1.7%	0.0%	2.5%	4.7%	2.2%	1.4%
12.	Homebase, Welford Road	0.0%	2.4%	23.2%	6.6%	3.2%	0.0%	1.8%	7.0%	6.0%
	Leicester Authority Total	97.9%	94.3%	70.2%	91.5%	23.0%	27.7%	82.0%	64.0%	55.3%
	Blaby									
4.	Blaby town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.2%
16.	Fosse Park and Grove Farm Triangle	0.0%	0.0%	1.2%	0.0%	2.3%	0.0%	0.9%	1.0%	0.7%
	Blaby Authority Total	0.0%	0.9%	3.4%	7.0%	3.2%	3.1%	5.8%	17.9%	6.2%
	Other Authority Areas									
1.	Hinckley	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	2.2%	1.2%	1.5%
13.	Oadby	0.0%	0.0%	8.9%	0.0%	4.7%	0.0%	0.0%	0.0%	1.3%
	Wigston	0.0%	0.0%	0.0%	0.0%	6.7%	0.0%	0.0%	0.0%	0.7%
OSA	Giltbrook Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
	Loughborough	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%	0.0%	0.8%
	Market Harborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
	Nuneaton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%

Source: WYG Table 21, Appendix 2

Comparison Goods Shopping Patterns: Furniture

4.47 Leicester city centre and Fosse Park each secure a relatively similar market share of furniture shopping trips which originate from within the Study Area, with the city centre securing 28.3% and Fosse Park 26.0% of all such trips. The city centre secures more than four in every 10 trips to purchase furniture goods in three zones, whilst Fosse Park manages to attract more than four in every 10 such shopping trips in one zone only (Zone 4).

4.48 The next most popular destination for furniture purchases is Hinckley town centre, which attracts just 4.4% of all such shopping trips which originate within the Study Area, thus emphasising the relative dominance of the two most popular locations

4.49 With regard to the performance of each authority area, Table 4.11 identifies that facilities within the Leicester administrative area claim 43.7% of all shopping trips to purchase DIY goods which originate within the Study Area and facilities within the Blaby administrative area claim 28.0% of all such trips.

Table 4.11a: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Furniture (%)

Zone	Address	1	2	3	4	5	6	7	8
	Leicester								
6.	Leicester city centre	8.4%	22.2%	7.3%	5.4%	31.4%	36.7%	67.8%	42.2%
	St George's Retail Park	0.0%	0.0%	9.5%	0.0%	0.0%	7.8%	4.7%	0.0%
8.	Hamilton district centre	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	2.6%
10.	Abbey Retail Park	0.0%	0.0%	1.6%	1.5%	0.0%	1.6%	1.2%	0.0%
	B&Q, Devonshire Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%
	Beaumont Leys	0.0%	0.0%	1.6%	1.5%	0.0%	2.4%	1.2%	0.0%
12.	Homebase, Welford Road	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%	4.7%
	Leicester Authority Total	8.4%	23.4%	19.7%	32.5%	33.0%	63.0%	85.0%	57.2%
	Blaby								
4.	Blaby town centre	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%
16.	Fosse Park and Grove Farm Triangle	17.1%	33.3%	31.8%	40.0%	10.2%	25.4%	9.4%	11.7%
	Blaby Authority Total	18.4%	34.5%	34.8%	42.0%	16.0%	25.4%	9.4%	16.3%
	Other Authority Areas								
1.	Hinckley	41.2%	15.3%	10.1%	0.0%	0.0%	0.0%	0.0%	0.0%
13.	Oadby	0.0%	0.0%	0.0%	0.8%	8.7%	9.1%	0.0%	2.6%
	Wigston	0.0%	0.0%	1.6%	8.6%	4.6%	0.9%	0.0%	0.0%
OSA	Giltbrook Retail Park	0.0%	0.0%	0.9%	6.3%	5.1%	0.9%	0.0%	4.7%
	Loughborough	0.0%	4.5%	0.0%	0.0%	5.1%	0.0%	0.0%	0.0%
	Market Harborough	0.0%	0.0%	1.4%	3.0%	12.8%	0.0%	0.0%	0.0%
	Nuneaton	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Table 4.11b: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Furniture (%)

Zone	Address	9	10	11	12	13	14	15	16	Total
	Leicester									
6.	Leicester city centre	37.4%	25.9%	46.2%	29.4%	34.0%	19.4%	18.3%	22.3%	28.3%
	St George's Retail Park	9.1%	0.0%	0.0%	1.4%	0.0%	0.0%	5.9%	0.0%	2.0%
8.	Hamilton district centre	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
10.	Abbey Retail Park	0.0%	7.8%	0.0%	3.2%	0.0%	3.0%	5.9%	3.6%	1.8%
	B&Q, Devonshire Road	4.8%	16.7%	1.3%	9.2%	1.7%	1.1%	0.0%	0.8%	2.9%
	Beaumont Leys	2.1%	14.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
12.	Homebase, Welford Road	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.6%
	Leicester Authority Total	56.7%	65.7%	50.8%	60.9%	38.6%	23.5%	32.3%	38.4%	43.7%
	Blaby									
4.	Blaby town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.2%
16.	Fosse Park and Grove Farm Triangle	37.9%	21.3%	34.7%	32.0%	17.1%	15.6%	33.7%	28.3%	26.0%
	Blaby Authority Total	38.8%	24.1%	35.5%	32.0%	17.1%	18.8%	36.8%	38.6%	28.0%
	Other Authority Areas									
1.	Hinckley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	4.4%
13.	Oadby	0.0%	0.0%	1.6%	0.0%	5.2%	0.0%	1.5%	0.0%	1.4%
	Wigston	0.0%	0.0%	5.0%	0.0%	12.2%	0.0%	0.0%	0.8%	2.0%
OSA	Giltbrook Retail Park	1.3%	0.0%	0.0%	1.7%	6.1%	3.2%	0.0%	3.1%	2.0%
	Loughborough	0.0%	0.0%	0.0%	0.0%	0.0%	7.3%	1.5%	0.0%	1.2%
	Market Harborough	0.0%	0.0%	1.6%	1.7%	1.1%	0.0%	1.5%	1.5%	1.2%
	Nuneaton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%

Source: WYG Table 23, Appendix 2

Conclusions in Respect of Comparison Goods Shopping Patterns

4.50 Once again, in considering shopping patterns in the Study Area, it is of some relevance to compare the percentage of overall journeys attracted to each authority area with the percentage of the Study Area population that resides in that authority area. In this regard, the populations of Leicester and Blaby respectively equate to 48.0% and 13.6% of the overall Study Area population. For comparison goods, we would generally expect both Leicester and Blaby to benefit from the respective sub-regional influence of the city centre and Fosse Park and secure market shares in excess of the above percentages.

4.51 As set out below in Table 4.12, Leicester's market share of shopping trips originating from within the Study Area for the various comparison goods sub-sectors ranges from 43.7% (for furniture goods) to 63.9% (recreation goods). The Leicester administrative area secures 54.6% of all clothing and footwear shopping trips which originate within the Study Area. Table 4.12 also sets out the market shares which are attracted by defined centres within each of the local authority areas, as well as the market share attracted by out-of-centre shopping destinations, such as Fosse Park.

4.52 Whilst the market shares secured by facilities in the Leicester administrative area are generally healthy, it is evident that the sub-sectors where Leicester performs less strongly are those where Fosse Park makes a substantial contribution to meeting customers' needs.

4.53 Due to the influence of Fosse Park, the Blaby administrative area attracts 38.1% of shopping trips to purchase electrical goods and 28.0% of shopping trips to purchase furniture goods (these represent the two comparison goods sub-sectors for which the Leicester administrative area secures its lowest market share). It should also be noted that such goods are often purchased in out of centre locations (due, in part, to operators' preference to trade from large floorplates with adjacent surface car parking) and that Blaby's market shares are not unusual in this context given the scale of provision at Fosse Park.

4.54 However, we do note that Blaby also secures 26.5% of all trips to purchase clothing and footwear shopping trips, which is a consequence of Fosse Park's strong fashion offer (it alone secures 25.6% of all clothing and footwear shopping trips originating within the Study Area). We would ordinarily expect the vast majority of such trips to be directed towards town centre locations and, in this regard, it is evident that the success of Fosse Park's acts to constrain Leicester city centre's market share in this regard (which still equates to 48.5% of all such shopping trips which originate within the Study Area).

4.55 Clearly, any future proposals to provide floorspace which could be accommodated by clothing and footwear (and other non-bulky) operators will need to the subject of particular scrutiny to ensure that Leicester city centre's market share would not be eroded to an unacceptable level following such development (with reference to the impact tests set out in development plan documents and the NPPF or any subsequent national planning policy document).

Table 4.12a: Comparison Goods Market Share by Sector for Each Authority (%)

Authority Area	Clothing and footwear	Books, CDs and DVDs	Small household	Recreation goods
Leicester				
Leicester city centre	48.5%	49.1%	31.3%	30.0%
Edge of Leicester city centre	0.0%	0.0%	0.0%	3.7%
Beaumont Leys town centre	4.2%	5.1%	3.4%	6.2%
District Centres	1.4%	2.1%	1.1%	1.2%
Local Centres	0.0%	0.3%	0.5%	0.0%
Out of centre	0.5%	0.5%	3.7%	22.8%
Leicester Authority Total	54.6%	57.2%	39.9%	63.9%
Blaby				
Blaby town centre	0.2%	0.6%	0.1%	0.1%
District centres	0.1%	0.3%	0.4%	0.4%
Rural centres	0.0%	0.0%	0.0%	0.0%
Local centres	0.1%	0.3%	0.0%	0.0%
Out of centre	26.1%	14.6%	22.9%	17.0%
Blaby Authority Total	26.5%	15.9%	23.5%	17.5%

Table 4.12b: Comparison Goods Market Share by Sector for Each Authority (%)

Authority Area	Chemist goods	Electrical	DIY	Furniture
Leicester				
Leicester city centre	32.1%	2.7%	7.9%	28.3%
Edge of Leicester city centre	0.1%	0.4%	1.4%	3.7%
Beaumont Leys town centre	3.9%	5.6%	1.4%	0.7%
District centres	3.1%	2.4%	0.2%	0.5%
Local centres	3.1%	0.7%	1.7%	1.7%
Out of centre	2.8%	8.4%	42.7%	8.8%
Leicester Authority Total	45.0%	45.2%	55.3%	43.7%
Blaby				
Blaby town centre	1.1%	0.1%	0.2%	0.2%
District centres	1.8%	0.8%	1.8%	0.5%
Rural centres	0.7%	0.0%	0.1%	0.0%
Local centres	1.1%	0.2%	0.8%	0.6%
Out of centre	17.5%	37.0%	3.4%	26.8%
Blaby Authority Total	22.2%	38.1%	6.2%	28.0%

In Street Survey

4.56 In street surveys were undertaken by NEMS Market Research in Leicester city centre during November 2014. The purpose of the surveys is to provide an insight into the views and behaviours of customers, residents and visitors in relation to their visits to the city centre. The surveys were undertaken in four locations, these being: East Gate (between Clock Tower and the entrance to High Cross Shopping Centre); Humberstone Gate (near Primark); at the junction of Gallowtree Gate, Halford Street and Horsefair Street; and, at the junction of Market Street and Horsefair Street. In total, 306 in-street surveys were undertaken.

Reason for Visiting the City Centre

4.57 Respondents were asked why they choose to shop or visit Leicester. Table 4.13 indicates that more than four out of every 10 respondents answered that the main reason they choose to visit city centre is because it is close to their home. Whilst this was by far the most popular response, other common reasons include the centre's proximity to friends and family, the market and the centre's strong provision of services (each of which were cited by 10.1% of respondents as their main reason for choosing to visit the centre).

Table 4.13: Main Reason for Choosing to Shop/Visit the City Centre

1st		Joint 2nd		Joint 2nd		Joint 2nd	
Close to Home	41.8%	Close to friends/family	10.1%	The market	10.1%	Provision of services (e.g. banks/ financial services)	10.1%

Source: NEMS In Street Survey, Question 9

4.58 In addition, respondents were also asked the principal purpose of their visit to Leicester city centre on the day of survey. As set out below in Table 4.14, the most common reason identified by respondents was to undertake clothes and shoe shopping (which was identified by 20.3% of respondents). The next most common purpose of visit was to browse the shops (cited by 17.7% of respondents), then to visit the market (11.4%) and then to go to work, school or college (8.9%). The top three answers effectively comprise forms of shopping and the reasons for visiting are therefore reflective of the city centre's higher order status and ability to cater for non-food shopping needs.

Table 4.14: Main Purpose of Visit to the City Centre on the Day of the Survey

1st		2nd		3rd		4th	
Clothes/shoes shopping	20.3%	Browsing	17.7%	Market	11.4%	Work/school/ college	8.9%

Source: NEMS In Street Survey, Question 10

Mode of Travel to Centre

4.59 Respondents were asked how they had travelled to the city centre on the day of the survey. As set out below at Table 4.15, by far the most popular means of access to the centre was by bus, minibus or coach, with over half of the respondents arriving by these modes of transport. This demonstrates the popularity of the many direct bus services that operate between the city centre and the surrounding communities. This may also be reflective of the cost and difficulty of accessing the city centre by car (which was the mode of travel for 26.8% of respondents). The number of people accessing the city centre by bike is relatively low, which is perhaps a little surprising considering that the centre and surrounding area is generally flat and lends itself well to cycling.

Table 4.15: Mode of Travel to City Centre

1st		2nd		3rd		4th		5th	
Bus, minibus or coach	52.9%	Car/van	26.8%	Walk	11.4%	Train	1.6%	Bicycle	1.3%

Source: NEMS In Street Survey, Question 3

Food Shopping

4.60 Respondents to the in street survey were asked how frequently they visited the city centre to undertake their main food and grocery shop. As set out below in Table 4.16, approaching half of respondents indicated that they never use the city centre for their main food shop. This is consistent with the low number of people accessing the city centre by car, as the convenience offered by a vehicle is generally conducive to undertaking a main food shop. The fact that a large proportion of respondents do not consider the city centre to be a venue for main food shopping is also reflective of the relatively limited provision of larger foodstores within the city centre itself. However, just greater than a fifth of respondents (20.2% in total) indicated that they undertake their main food shop within the city centre once a week or more, which demonstrates that the city centre is an important destination in this regard for a number of people, including residents of the city centre and the surrounding area.

Table 4.16: Frequency of Visit to City Centre to Undertake Main Food Shopping

Every day	2 3 times a week	Once a week	Once a fortnight	Once a month	Less than once a month	Never
0.3%	2.6%	17.3%	11.8%	8.5%	6.9%	43.8%

Source: NEMS In Street Survey, Question 14

4.61 Respondents were asked which centre or store they last visited to undertaken their main food or grocery shopping. The most popular destinations identified by respondents were: the Iceland at Belgrave Gate (identified by 10.5% of respondents as the location of their last main food shop); Morrisons at Counting House Road (6.9%); Aldi at Meridian Way (6.5%); Sainsburys at Fosse Park/Grove Farm Triangle (4.6%); and, Asda at Leicester Road in Oadby (4.3%).

4.62 The Iceland store is located within the city centre, which is a likely explanation for it being featured in a high proportion of the responses. However, all of the other locations identified above are outside of the city centre. Of particular note is the popularity of the Aldi at Meridian Way, which is the third most popular answer, but is located over 5 kilometres to the east of the city centre. However, the popularity of foodstores throughout the Study Area is reflective of the fact that Leicester city centre performs an important sub-regional comparison goods shopping role and it is therefore unsurprising that those who travel into the city centre to undertake comparison goods shopping (or for other activities) choose to do their food shopping closer to home.

Non-Food Shopping

4.63 Respondents were also questioned in respect of their non-food shopping habits. The frequency of visit to the city centre to shop for non-food goods is significantly higher than for main food shopping, which is perhaps reflective of the fact that respondents consider the city centre to be principally a venue for non-food shopping and one where they only occasionally undertake main food shopping. Clearly, this is reflective of the wide range of non-food goods offered in the city centre, including a range of both national multiple and independent retailers. As identified by Table 4.17, 31.3% of respondents visit the city centre to undertake non-food shopping once a week or more, and 64.0% of respondents visit the centre for this purpose once a fortnight or more.

Table 4.17: Frequency of Visit to City Centre to Non-Food Shopping

Every day	2 3 times a week	Once a week	Once a fortnight	Once a month	Less than once a month
0.3%	6.5%	24.5%	32.7%	17.0%	14.4%

Source: NEMS In Street Survey, Question 20

4.64 Unsurprisingly, the most popular location in terms of where respondents to the in street survey last undertook non-food shopping is Leicester city centre, which collectively secured 61.4% of responses. More precisely, 24.2% of respondents indicated that their last non-food shopping was undertaken at city centre shops, 17.7% identified the Haymarket Shopping Centre as the venue for their last non-food shopping, 16.7% identified the Highcross Shopping Centre and 2.9% identified Gallowtree Gate

Shopping Centre. A number of destinations outside the city centre were also identified by respondents, including Beaumont Leys town centre (8.2%) and Fosse Park/Grove Farm Triangle (6.5%), which were respectively the fourth and fifth most common responses.

4.65 People who did not visit Leicester city centre for their last non-food shop were asked why they chose an alternative venue. The most common reasons were that their preferred centre was closer to home (cited as being the principal reason by 25.5% of respondents), the quality of shops selling non-food goods (16.0%) and because of the shopping environment (15.7%).

Comparison to Other Centres

4.66 As part of the in-street survey, respondents were asked to compare the city centre with other broadly similar sized centres, such as Nottingham or Derby. More than half of respondents (51.0%) considered Leicester city centre to have the same choice of shops, 40.2% of respondents considered the centre to have a better choice and only 3.3% said that the centre performed less well than comparably sized centres in this regard. A similar pattern of response was evident when respondents were questioned in relation to the choice of high street names, the quality of shops, the range of services (such as banks and other financial services) and the range of leisure facilities, with the vast majority of respondents identifying Leicester city centre to be at least equal to (and, in many cases, better than) centres of a comparable size across the wider area.

4.67 The attraction most commonly cited by respondents as being less well provided for in Leicester city centre compared to centres of a comparable scale is the choice of independent and specialist shops. However, even in this regard, the vast majority of respondents thought Leicester performed at least as well as its competitors, with only 14.4% of respondents indicating that Leicester had a weaker independent and specialist sector than similarly sized centres.

4.68 When asked how the city centre compares to other centres in terms of its car parking provision, 11.8% of respondents indicated that Leicester performs worse and 8.5% indicated that it performs much worse than other centres. This is broadly consistent with the relatively low proportion of respondents who travelled to the city centre by car and city centre parking is clearly perceived as an issue locally[31]. However, when asked about the city centre environment, not one respondent identified that Leicester performs much worse than other centres and 81.7% of respondents indicated

[31] It should be noted that car parking provision and the cost of car parking is, in our experience, very often identified as a concern by respondents to in street surveys and the results are therefore not considered to be unusual and should therefore be considered in this context

that the city centre performed either the same or better than other centres. As we report in the following section, the city centre's environment was noted as being of a high quality in a number of locations during the course of our visits to undertake the health check assessment work.

Types of Shops and Services Desired by Respondents

4.69 Respondents were asked what type of shops or services they would most like to see more of in the city centre. As we would expect with such an open question, a large variety of responses were provided, with the most common response identifying a requirement for more independent retailers (cited by 11.1% of those questioned). Respondents were also keen to see more department stores and clothes shops, which is perhaps reflective of peoples' expectation for Leicester city centre to accommodate a wide variety of high street brands and provide access to retailers which are not available on every high street.

4.70 As Table 4.18 identifies, the third most popular response related to a perceived need for more large supermarkets within the city centre. Although the existing provision of supermarkets within the city centre is limited and a low proportion of people currently undertake their main food shop within the city centre, this figure demonstrates that there is a desire for people to carry out their main food shop in the city centre.

Table 4.18: Types of Shops and Services Desired

1st		2nd		3rd		4th	
Independent/ specialist shops	11.1%	Department stores/ retailers	10.8%	Large supermarkets	10.1%	Clothing stores	7.5%

Source: NEMS In Street Survey, Question 33

Types of Leisure Facilities Desired

4.71 In terms of leisure facilities, Table 4.19 indicates that the type of additional provision most commonly sought after in Leicester city centre is a swimming pool (which was identified by 18.6% of respondents). The city centre does not currently accommodate a local authority-owned public swimming pool (which may at least go some way to accounting for this relatively high response), but De Montfort University's Queen Elizabeth II Leisure Centre at Duns Lane is open to the public.

4.72 Other facilities that featured within the top four responses included an ice or roller rink (identified by 6.2% of respondents), a bowling alley (5.2%) and new parks and gardens (7.5%). The remaining 15 types of other facilities that were identified each received a limited response rate (of less than 4.0%), which is perhaps indicative of the fact that the centre is generally well provided for in terms of leisure facilities and there are not a host of desired additional required facilities which have been identified by respondents with any real frequency.

Table 4.19: Types of Leisure Facilities Desired

1st		2nd		3rd		4th	
Swimming pool	18.6%	Ice/roller rink	6.2%	Bowling alley	5.2%	Parks/gardens	4.6%

Source: NEMS In Street Survey, Question 34

Measures to Improve the Centre

4.73 In identifying measures which would help to improve the city centre, Table 4.20 identifies that the most common suggestion was to improve the centre's cleanliness (which was cited by 14.1% of respondents). This is perhaps slightly at odds with the responses to the earlier questions about the shopping environment, where the majority of people said that Leicester performed either better or the same in this regard as comparable city centres.

4.74 The issue of cars within the city centre was brought up again within the responses to this question, with the need to reduce traffic congestion identified by 9.8% of respondents and the need for cheaper car parking identified by 5.2% of respondents. However, a significant portion of respondents were also keen to see the city centre receive a general face lift (10.8%) and for empty shops to be filled (8.5%). In this regard, it should be noted that these identified requirements will to some degree be fulfilled by ongoing public realm improvement schemes within the city centre that are already underway or are in the pipeline.

Table 4.20: Most Popular Suggested Measures to Improve the City Centre

1st		2nd		3rd		4th	
Improved cleanliness	14.1%	A general 'facelift' (planting, painting and so on)	10.8%	Reduce traffic congestion	9.8%	Fill empty shops	8.5%

Source: NEMS In Street Survey, Question 35

Biggest Weakness of the City Centre

4.75 When asked about the biggest weaknesses in each centre, approaching a fifth of respondents cited empty shops as being a concern, which was by far the most popular response. This is reflective of the vacancy levels in some parts of the city centre. Other perceived weaknesses that were most frequently identified by respondents are set out in Table 4.21 and include the suggestion that the centre is of poor appearance (cited by 6.2% of respondents), the price of car parking (5.6%) and the general town centre environment (4.6%).

Table 4.21: Biggest Identified Weaknesses of the City Centre

1st		2nd		3rd		4th	
Empty shops	18.3%	Poor appearance	6.2%	Price of car parking	5.6%	Town centre environment	4.6%

Source: NEMS In Street Survey, Question 36

Night Time Economy

4.76 Respondents to the in street survey were also asked their views in respect of the city centre's night time economy. As indicated by the below Table 4.22, slightly more than half (52.9%) of respondents indicated that they do not visit the city centre during the evening. However, 17.3% of respondents stated that they visit the city centre at night more than once a fortnight and a further 26.5% stated that they visit the city centre once a month or more. This indicates that the city centre's bars, restaurants and other leisure facilities constitute a significant draw and, for many, form an important part of the city centre's overall offer.

Table 4.22: Frequency of Evening Visit to the City Centre

Every day	2 3 times a week	Once a week	Once a fortnight	Once a month	Less than once a month
0.7%	4.9%	3.9%	7.8%	26.5%	52.9%

Source: NEMS In Street Survey, Question 43

4.77 Respondents were also asked their main reason for visiting the city centre during the evening. Table 4.23 identifies that nearly half indicated that their principal reason for visiting was to visit a bar or a pub (these together were identified by 45.6% of respondents). The third and fourth most popular responses recorded were to go to visit the theatre and the cinema, which were respectively identified by 11.6% and 8.8% of respondents.

Table 4.23: Main Reason for Visiting in the Evening

1st		2nd		3rd		4th	
Visit a bar	32.7%	Visit a pub	12.9%	Go to the theatre	11.6%	Go to the cinema	8.8%

Source: NEMS In Street Survey, Question 45

4.78 When asked what other activities people tend to partake in whilst visiting the city centre in the evening, 59.2% of respondents identified at least one secondary activity. These additional activities included visiting a bar or pub (which together were identified by 32.0% of respondents), visiting the cinema (17.0%) and visiting a nightclub (16.3%). Accordingly, as one might expect, it is evident that substantial numbers of people undertake several leisure activities during a visit to the city centre during evening hours and that, for example, visits to the theatre or to a nightclub may also involve a visit to a bar or restaurant.

Leicester Market

4.79 Over half of respondents to the Leicester city centre in street survey intended to visit Leicester market on the day of visit. Of those that indicated they were going to visit the market, 56.0% stated that they were going to visit the indoor market only, 20.7% intended to visit the outdoor market only and 23.3% planned to visit both indoor and outdoor markets.

4.80 As identified below at Table 4.24, the importance of the market is further demonstrated by the fact that nearly 55.9% of the respondents said that they visit the market one or more times a fortnight and a further 20.9% said that they visit the market on a more occasional basis.

Table 4.24: Frequency of Visit to Leicester Market

Every day	2 3 times a week	Once a week	Once a fortnight	Once a month or less	Never
1.3%	11.8%	25.5%	17.3%	20.9%	13.4%

Source: NEMS In Street Survey, Question 38

4.81 When respondents were asked what they particularly liked about Leicester market, the most common answer, which received 20.3% of responses, was that it is good value for money. People also liked the quality and freshness of food (identified by 16.3% of respondents) and the friendly atmosphere (11.1%).

4.82 When respondents were asked what they didn’t like about the market, the most popular response (provided by 47.7% of respondents) was that there was no aspect of the market that was disliked. This demonstrates a strong sense of satisfaction with the existing market facilities, which may in part reflect the fact that the Market Food Hall is an entirely new facility. Very few negative aspects of the market were identified by any significant numbers of respondents, with the most frequently identified negative factors being a perceived lack of cleanliness (identified by 3.9% of respondents), poor quality food (3.6%), litter (2.9%) and a poor quality environment 2.9%).

Consultation with Key Stakeholders

4.83 WYG engaged with key stakeholders to better understand the performance of centres within the authority areas and any challenges they may face going forward. A range of stakeholders were consulted from both authority areas and the information gained has helped to inform the retail study. The following is a summary of the responses that were received.

Leicester

4.84 With regards to the current trends within Leicester city centre, one stakeholder told us the city centre has grown considerably in the past five years, more so than in the whole of the past 30 years. This was said to be because Leicester currently has a lot to offer, including a good location within the centre of the country, a large business base, diverse ethnicity, history, architecture and a great retail offer. The respondent said that recent success has attracted many new visitors and businesses to the city. This viewpoint was emulated by another respondent, who informed us that the city centre currently has demand from retailers who are looking to locate to the city centre. These types of operator were said to typically be aspirational fashion retailers and restaurateurs, who are currently underrepresented in the city centre. Another respondent said that in terms of the local, national and global economy, Leicestershire businesses are performing well. Although yields are affected by on-line retail, customer confidence still seems to be high.

4.85 However, one respondent warned that the recent growth has lost momentum and that very serious issues exist that are constraining economic development. We were told that targeted improvements are needed to retain and consolidate the achievements of the past five years. Furthermore, the respondent believes that the improvements are needed quickly, as bad experiences will result in a rapid reduction of business and visitor interest. One particular example was given, that the current lack of hotel accommodation is preventing the city from hosting large events and benefiting from the associated economic opportunities and that some businesses have turned down the opportunity to hold such events for this very reason. The issue is also said to constrain tourism, as the lack of hotel accommodation reduces the ability to offer package deals, which a large section of the industry are attracted to.

4.86 Concerns were also directed towards the city's transport infrastructure. We were told that train connections, in particular, are a major issue, as they require evening visitors to cut their trip short to catch the last train home. This is said to constraint the potential of cinemas, restaurants and theatres, where a longer stay is required.

4.87 One respondent also told us that parking is repeatedly brought up by customers, as private companies own a large proportion of city centre car parks and charge high prices in comparison to council operated car parks. It was said that this give people a negative experience to people visiting the city. Another respondent also criticised the city's traffic management, which creates bottlenecks and deters visitors – the Highcross Street/Sanvey Gate signalised junction was given as an example of where this issue regularly occurs.

4.88 It is also felt that opportunities are being missed to maximise the visitor experience and that more can be done to encourage people to diversify their single purpose visits. One respondent said that apart from the privately operated shopping centres, Sunday trading is underperforming and it is felt that this, together with the early evening economy, needs better coordination and expansion to accommodate demand. Another respondent iterated that to increase dwell time, limit travel distances and provide complimentary facilities to the retail units, there needs to be a greater mix of leisure uses within the city centre, such as restaurants, cafes, bars, cinemas and entertainment venues. In addition, the respondent suggested that further investment should be directed towards improving integration of the more isolated parts of the city centre, intensifying uses and re-instating the traditional street patterns to ensure that the city retains its attractiveness to shoppers.

4.89 One respondent said that the key drivers to demand in the city centre are the types of space that are available, location, cost and brand identity. The respondent thought that the city centre lacks significant opportunity to deliver and build larger retail units of more than 1,000sq.m. However, they believed that parcels of land can be readily identified, assembled and developed within the city centre to provide a significant quantum of additional floor space for retail and leisure uses.

4.90 We were told that the development and expansion of The Shires into the Highcross Shopping Centre has changed footfall patterns within the city. Because John Lewis is located on the periphery of the city's main shopping area, with little beyond it besides parking and a bus station, pedestrian traffic is drawn to the edge of the shopping area. Closure of the New Walk Council building and the dispersal of the City Council staff across the city is also believed to have changed footfall on Belvoir Street and Market Street.

4.91 In terms of vacancy rates, one viewpoint considered vacancy within the city centre to have improved considerably since the recession. The person explained that confidence in Leicester is generally high and units are being re-let. However, the respondent thought that the current empty units within the city generally have a negative impact on the city's image and sense of safety. Highcross Shopping Centre was given as an example of an area that has successfully reduced the impact of empty units by filling windows with positive media, which reduces peoples' perception that the shop is empty and helps to create a sense of active retail frontage. It was suggested that this type of coordinated approach can be rolled out across the city. Another respondent informed us that the vacancy issue in one of the city's shopping centre's had been overcome through careful management, good planning, a strong leasing programme and asset management initiatives.

4.92 We are also told that there is an opportunity to improve the city's marketing at a national, regional and local level, as the majority of businesses, tourists and every day visitors are unaware of what the city has to offer. The respondent felt that there is a lack of a coordinated body who can effectively drive the city's image forward and keep the city's offer fresh. They believe that a comprehensive approach is needed with organisations working together under a plan to tackle issues, such as unattractive retail frontages, high numbers of takeaways, finding innovative ways to attract new brands and helping independent retailers to start up in the city centre.

4.93 Another respondent expressed concern about new retail and leisure developments outside the city centre, which do not support city centre footfall growth and what they believed could potentially lead to more temporary or poorer quality retailers taking space in the city centre. In particular, concerns were raised about enhancements to the out of centre food and drink offer, which they considered would lead to longer dwell times and provide a wider range of facilities for shoppers outside of town and city centres. The same respondent also highlighted the competition that the city centre faces from free car parking at the out of centre retail parks. Furthermore, it was feared that if the health and vitality of the city centre is not protected and expansion of out of centre retail parks occurs, it could prevent planned in centre schemes from coming to fruition.

Fosse Park

4.94 With regards to the current trends at Fosse Park, we were told that the Park benefits from its strategic location and critical mass of retailing. We were also told that vacancy rates are very low, as of September 2015 there were only two vacant units and that these were both being refurbished as part of the former BHS unit works. Furthermore, the respondent informed us that there is demand from additional retailers who are keen to secure representation at the Park.

4.95 With regards to current issues or deficiencies that are experienced at Fosse Park, we were informed that there are congestion issues within the Park at peak times. The respondent said that a comprehensive and integrated solution to transport is needed to improve accessibility to Fosse Park. In addition, concern was also raised about the physical appearance of the properties, which were said to be in need of modernisation. One respondent also told us that Fosse Park's current deficiencies include a desire for more leisure space, as the current provision is not relative to the existing retail space.

4.96 In relation to future developments at Fosse Park, we were told about plans to refurbish the front elevations of Fosse Park North and improve the car park layout and landscaping. The Food Court has also been identified as an area where improvements are being considered to create a more relevant and exciting food and beverage offer.

5.0 Health Check Assessments

5.01 The NPPF identifies a number of factors which will be of relevance in delivering sustainable development, with one such factor being the need to ensure the vitality and viability of town centres. Paragraph 23 of the NPPF indicates that local authorities should promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Paragraph 23 also requires local planning authorities to recognise that town centres are at the heart of their communities and to pursue policies that support their viability and vitality. It also states that competitive town centre environments should be promoted in order to enhance customer choice, provide a diverse retail offer and in order to reflect the individuality of town centres.

5.02 The criteria by which the health of a centre can be judged is set out in the Government's Ensuring the Vitality of Town Centres Planning Practice Guidance of March 2014. Indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time include the following:

- **Diversity of uses –** Data on the diversity of uses in the town centre and the district and local centres was collated during our surveys in October and November 2014.
- **Proportion of vacant street level property –** Vacant properties were identified during the undertaking of the surveys.
- **Customers' views and behaviour** – Analysis of customers' views in respect of Leicester city centre is provided in the preceding Section 4 of this report.
- **Retailer representation –** Information on the performance of centres and the current strength of retailer representation has been derived from Venuescore's 2013-14 UK Shopping Venue Rankings.
- **Commercial rents –** Zone A rental data has historically been derived from Estates Gazette Interactive (EGi) data, which is a widely recognised source of such information. However, EGi has discontinued its reporting of such data and we have been unable to establish an alternative, reliable published source of such data. We are unable to provide comment on any changes in commercial rents within the two authority areas.
- **Pedestrian flows** – General footfall and pedestrian flows were observed during the undertaking of the centre surveys.
- **Accessibility –** Consideration of access to and around each centre is informed by our site visits to each centre.
- **State of town centre environmental quality –** Consideration of the quality of the buildings and

public realm in each of the centres has also been informed by our observations when undertaking field work.

5.03 We have also had regard to the proliferation of vacant land and premises and the opportunities which may exist for future growth in the Leicester and Blaby authority areas.

5.04 We set out below our analysis of Leicester city centre in respect of the above indicators. We have also visited each defined town, district and local centre in the Leicester and Blaby authority areas and, whilst not all of the above indicators are applicable to smaller centres, we provide an assessment of the health of these centres at Appendix 3 (for Leicester's centres) and Appendix 4 (for Blaby's centres). We summarise our key findings with regard to the centres later in this section of the report.

5.05 We commence our assessment by considering the role of Leicester and Blaby's centres in the sub-regional shopping hierarchy as identified Venuescore's 2013-2014 UK Shopping Venue Rankings.

Defining Types of Sub-Regional Retail Hierarchy

5.06 Table 5.1 illustrates the position of the sub-region's principal centres based on Venuescore's Rankings. Venuescore's index ranks 2,705 retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres), based on the strength of their current retail provision. Towns and major shopping centres are rated using a scoring system which takes account of the presence in each location of multiple retailers – including anchor stores, fashion operators and non-fashion multiples.

5.07 Venuescore allocates each centre to a tier, reflecting its role and function. The eight tiers comprise (highest to lowest): 'Major City', 'Major Regional', 'Regional', 'Sub-Regional', 'Major District', 'District', 'Minor District' and 'Local'. The rankings in the table represent the position of the centres at the time of the 2013-14 Rankings, as well as competing surrounding shopping venues. The market position index and classification, as set out in the below table, provide an indication as to whether a retail venue's focus is upmarket (luxury goods) or more downmarket (discount stores).

5.08 As set out below in Table 5.1, Leicester is classed as a Major City by Venuescore and is ranked 17th of all the venues surveyed in the 2013-14 Rankings. As would be expected, Leicester is the highest ranked centre in the Study Area, with its role ensuring that it occupies a significantly more elevated position in the Rankings than nearby towns such as Blaby, Loughborough and Rugby. Within the East Midlands region, it is the second highest ranked venue which places it ahead of Derby and

Northampton, and below only Nottingham. Nottingham is located approximately 40 kilometres to the north of Leicester and is the only other centre within the region classed as a Major City by Venuescore.

5.09 Leicester city centre incorporates a diverse retail offer which includes high-order multiple retailers focused within the Highcross and Haymarket shopping centres, alongside a variety of independent traders, many of which are accommodated within St Martin's Square and the surrounding Leicester Lanes. Highcross shopping centre itself is included in Venuescore's Rankings and is ranked 18th out of 200 shopping malls. The open-air Leicester Market with its new food hall building also serves as an important attraction within the city centre, with further regeneration work planned to further improve the historic market area.

5.10 Whilst Leicester city centre has slipped three places in the Rankings since 2010 (when it secured 14th place), we note that two of the larger centres which significantly improved their ranking – Aberdeen and Cardiff – had large scale retail developments which opened at the end of 2009 and bedded in subsequent to the publication of the 2010 Rankings. Accordingly, Leicester's slight deterioration in performance is not considered to be of particular concern.

5.11 There are a further nine destinations within the Leicester administration area that are included in the Venuescore Rankings. In addition, there are a further three centres within the Blaby administration area, including Blaby itself.

5.12 Table 5.1 indicates that, below Leicester city centre, Fosse Park is classified as a Sub-Regional shopping venue, which occupies 250th place in Venuescore's rankings. We would suggest that this ranking is slightly lower than we would expect and reflects the fact that Venuescore reflects the type and number of operators within a venue but does not score according to the size of each unit. Fosse Park typically provides large floorplates, allowing its retailers to stock comprehensive ranges of goods. Its ranking has remained relatively stable since the publication of the 2010 Rankings.

5.13 The Rankings are reflective of the presence of national multiple retailers in a particular centre and are therefore a more accurate barometer of the performance of larger centres. Accordingly, towards the lower end of the Rankings, the importance of a centre can be overlooked or amplified based on whether a handful of national multiples are present or not. With regard to centres in Leicester and Blaby, we note that Belgrave Road district centre is sub-divided into two centres and its ranking of 2,428th is therefore perhaps not reflective of the wider importance of Belgrave Road and its 'Golden Mile' beyond the local community.

Table 5.1: Venuescore's Sub-Regional Shopping Hierachy

Centre	Classification	Market Position Classification	Market Position Index (Average 100)	Score	Rank 2013	Rank 2010
Nottingham	Major City	Upper Middle	117	457	7	7
Leicester city centre (LCC)	**Major City**	**Upper Middle**	**110**	**367**	**17**	**14**
Derby	Major Regional	Middle	101	297	27	21
Northampton	Regional	Middle	102	218	56	69
Loughborough	Sub-Regional	Lower Middle	89	123	192	203
Kettering	Sub-Regional	Lower Middle	86	115	200	192
Grantham	Sub-Regional	Middle	90	102	229	189
Fosse Park (BDC)	**Sub-Regional**	**Middle**	**106**	**92**	**250**	**259**
Market Harborough	Sub-Regional	Middle	104	90	258	329
Melton Mowbray	Sub-Regional	Lower Middle	89	78	317	309
Beaumont Leys (LCC)	**Major District**	**Lower Middle**	**85**	**53**	**495**	**456**
Stoneygate (LCC)	**Local**	**-**	**-**	**20**	**1,322**	**1,598**
St Georges Retail Park (LCC)	**Local**	**-**	**-**	**19**	**1,383**	**1,132**
Blaby (BDC)	**Local**	**-**	**-**	**16**	**1,605**	**1,565**
Almond Rd Retail Park (LCC)	**Local**	**-**	**-**	**13**	**1,907**	**1,875**
Uppingham Road (LCC)	**Local**	**-**	**-**	**13**	**1,907**	**2,024**
Hinckley Road (LCC)	**Local**	**-**	**-**	**12**	**2,061**	
Leicester Forest East MSA (BDC)	**Local**	**-**	**-**	**12**	**2,061**	
Hamilton Way (LCC)	**Local**	**-**	**-**	**10**	**2,428**	
Belgrave Road (LCC)	**Local**	**-**	**-**	**10**	**2,428**	
Melton Road (LCC)	**Local**	**-**	**-**	**10**	**2,428**	

Source: Venuescore 2013-2014 UK Shopping Venue Rankings
Note: 'LCC' and 'BDC' respectively denote that facilities are located within the Leicester City Council and Blaby District Council administrative areas

Leicester City Centre Health Check Assessment

5.14 The adopted Leicester City Core Strategy seeks to maintain and enhance the city centre's position as a sub-regional shopping, leisure, historic and cultural destination. In support of this strategic goal, the Core Strategy seeks to safeguard the Central Shopping Core as the focus of city centre retail development and ensure that the principal shopping streets remain primarily in retail use.

5.15 The city centre has a number of distinct retail areas that collectively form a 'Central Shopping Core'. The extent of the Central Shopping Core is defined within the adopted City of Leicester Local Plan Proposals Map.

5.16 One of the busiest areas within the Central Shopping Core is the largely pedestrianised sections of Humberstone Gate, High Street, East Gates and Gallowtree Gate. Humberstone Gate and High Street form a main pedestrian thoroughfare running east to west through the city centre. This central area is characterised by its many large format stores that are operated almost exclusively by national high street brands. East Gates is the point where a number of radial roads meet and is the location of Leicester's famous clock tower, which marks the importance of this location.

5.17 To the north-west of the clock tower is the modern Highcross shopping centre (formerly known as The Shires, prior to its redevelopment in 2008), which is split across two levels. Highcross now contains over 160 retail and restaurant units, many of which are occupied by major national multiple operators, in a modern shopping mall environment. Since completion of the previous Leicester Retail Study, Highcross has been greatly extended to its western side, which incorporates a John Lewis department store and Showcase Cinema. The redevelopment has also provided significant public realm improvements (including the formation of St Peter's Square), new restaurants, cafes and residential accommodation, the 2,000 space multi-storey John Lewis car park and the new bus interchange on Causeway Lane.

5.18 To the north-east of the clock tower is Haymarket shopping centre. Haymarket is smaller than Highcross, but is again split across two levels and accommodates a variety of national retail operators.

5.19 To the south of High Street, St Martin's Square shopping centre and the surrounding lanes which follow the city's historic street layout provide a concentration of largely independent retailers, cafes, bars and restaurants. These shops are generally small format units and have a different character to the surrounding areas.

5.20 To the south of St Martin's Square is Leicester's large outdoor market. The market is open six days a week, Monday to Saturday, and provides over 300 stalls offering a diverse range of food produce and comparison goods, such as clothing, footwear, bags, jewellery and household products. In addition to the daily market, a farmers' market is also held on the first Thursday of every month.

5.21 Works are ongoing to upgrade and improve Leicester Market as part of a £9.2 million investment plan. The first phase of the investment plan has been completed with the opening of the new Food Hall in May 2014. Work on phase two has now also commenced, which involves the demolition of the Market Hall and the creation of a new public realm space to the rear of the Corn Exchange building.

5.22 The more peripheral parts of the defined Central Shopping Core include a number of radial streets which accommodate smaller format stores. These areas have lower levels of footfall and are characterised by discount stores, fast food takeaways, independents, health and beauty service providers, cafes and restaurants. As we would expect, these peripheral areas are generally the subject of higher vacancy rates. These areas are also the location of a number of office developments, as well as multi-storey and surface level car parks. Streets of this character include the southern part of Granby Street, the northern parts of Belgrave Gate and Churchgate, and elements of Church Street.

5.23 In the southern part of the Central Shopping Core (south of Gallowtree Gate), there is a civic area that has its own distinct character which differentiates it from the other surrounding commercial areas. This part of the city centre includes the Town Hall Square which provides an area of public greenspace close to the heart of the city centre. Surrounding Town Hall Square are a number of banks and financial services, as well as an advice centre, Leicester Central Library and the Town Hall. However, this area also contains a number of large vacant bank buildings.

5.24 As a major city centre, Leicester also sustains significant number of cultural facilities, including the Curve and Athena theatres, Leicester Cathedral and the Phoenix Cinema and Art Centre. A number of the city's modern cultural facilities are now clustered together within the eastern side of the city centre, focused around Halford Street and directly to the east of the Central Shopping Core boundary. The city centre also has a significant concentration of office accommodation, which is predominantly situated within the southern half of the city centre. Established visitor attractions on the edges of the city centre include Welford Stadium (home of Leicester Tigers rugby union club) and the New Walk Museum and Art Gallery, as well as the City's two major university campuses.

5.25 Improvement works have been ongoing within the city centre in recent years in the form of various environmental and public realm improvement schemes. Work is presently underway on the redevelopment of the Haymarket bus station, to include the demolition of the existing bus station and the erection of a new facility with concourse. This will increase the number of bus stands from 12 to 23 and the new facility is scheduled to open in Spring 2016.

5.26 In terms of existing commitments within the city centre, planning permission (reference 20141404) was granted in September 2014 for a mixed use development incorporating a small scale foodstore, non-food retail outlet and 150 apartments on land adjacent to the Highcross multi-storey car park at Vaughan Way. The consented development will provide access to the existing Highcross scheme through an addition to the pedestrian footbridge which presently links the shopping centre to the multi-storey car park and, as such, would extend the city's retail environment beyond the confines of the central ring road.

5.27 A health check assessment of Leicester city centre was undertaken as part of the previous Leicester Retail Study of 2007. For the purposes of the Study, it would appear that the Central Shopping Core area as identified by the Leicester City Local Plan Proposals Map was used to define the survey area. To inform this current Study, we undertook a new survey of Leicester city centre on 25 and 26 November 2014. The survey was based on the Experian Goad boundary area of the city centre as use of the Goad boundary allows data on the occupation of units to be 'benchmarked' with national average Goad data.

5.28 Whilst it is acknowledged that there are some differences between the Council's Central Shopping Core area and the Experian Goad boundary area of the city centre, the two boundary areas largely correlate with each other and represent a broadly comparable area.

Diversity of Uses

5.29 We have reviewed the diversity of retail and service uses accommodated in the city centre (by number, type and quantum of floorspace) and provide our findings below. A plan illustrating the location and use of each unit in the city centre (as defined by Experian Goad) is provided at Appendix 5.

5.30 It should be noted that Tables 5.2 and 5.3 exclude a number of uses, including health centres, religious institutions and educational institutions (Use Class D1) as well as offices (Use Class B1).

Table 5.2: Leicester City Centre Diversity of Use for Commercial Units

	2007		2011		2014		UK Average
	No. of Outlets	%	No. of Outlets	%	No. of Outlets	%	%
Convenience	73	7.2%	58	5.2%	79	7.3%	8.4%
Comparison	361	35.8%	405	36.4%	381	35.1%	32.5%
Leisure Service	210	20.8%	245	22.0%	269	24.7%	22.4%
Retail Service	97	9.6%	101	9.1%	118	10.9%	14.1%
Financial and Business Service	101	10.0%	95	8.5%	96	8.8%	10.9%
Vacant	166	16.5%	210	18.9%	144	13.2%	11.4%
Total	**1,008**	**100.0%**	**1,114**	**100.0%**	**1,087**	**100.0%**	**100.0%**

Source: WYG survey of November 2014, based on Experian Goad city centre boundary and Goad survey data June 2014. UK average figure is at November 2014 (taken from Goad Category Report averages)

Table 5.3: Leicester City Centre Diversity of Use for Commercial Floorspace

	2007		2011		2014		UK Average
	sq.m	%	sq.m	%	sq.m	%	%
Convenience	11,300	4.6%	16,790	5.6%	18,430	6.5%	15.0%
Comparison	105,000	43.1%	131,250	43.9%	117,930	41.6%	36.2%
Leisure Service	56,560	23.2%	70,420	23.6%	75,350	26.6%	23.2%
Retail Service	12,760	5.2%	13,260	4.4%	13,080	4.6%	7.4%
Financial and Business Service	20,260	8.3%	20,090	6.7%	19,830	7.0%	8.2%
Vacant	37,830	15.5%	47,100	15.8%	38,760	13.7%	9.3%
Total	**243,710**	**100.0%**	**298,910**	**100.0%**	**283,380**	**100.0%**	**100.0%**

Source: WYG survey of November 2014, based on Experian Goad city centre boundary and Goad survey data June 2014. UK average figure is at November 2014 (taken from Goad Category Report averages)

5.31 Table 5.3 indicates that the current number of convenience stores in the city centre is below the national average level of provision, with the 79 units in this use comprising 7.3% of the stock of commercial units. Convenience units together provide a total floorspace of 18,430 sq.m. Convenience floorspace represents 6.5% of all city centre commercial floorspace, which is well below the national average of 15.0%. However, this relative under-representation compared to the national average is expected within a city centre of sub-regional importance as such centres typically provide a particularly strong comparison goods offer.

5.32 There is no large format convenience superstore within the city centre area, with the convenience offer provided across a number of smaller scale foodstores, as well as by Leicester Market which is presently known to have a strong food offering. The three largest foodstores at the time of our survey were the Iceland store on Belgrave Gate, the Sainsbury's store on Humberstone Gate and the Co-operative Food store within the Haymarket shopping centre. However, the Co-operative Food store has subsequently ceased trading. Further small scale foodstores accommodated within the city centre include three Tesco Express stores, a Sainsbury's Local and a Heron Foods.

5.33 Of the 'big four' supermarket retailers, only Asda does not have a presence within the city centre as Morrisons opened an M Local format store on Market Street in January 2015. An Aldi store is located to the east of the city centre area within St Georges Retail Park. There are currently no Aldi, Lidl, M&S Simply Food or Waitrose stores within the Central Shopping Core area.

5.34 The number of foodstores within the city centre has increased slightly since the last Leicester Retail

Study of 2007 (which is due, in part, to the opening of the Tesco stores). Notwithstanding the closure of the Co-operative Food store, in overall terms, the quantum of convenience floorspace has steadily increased since 2007. However, it is considered that there has not been a discernible qualitative change in provision, with the existing store formats continuing to primarily cater for top-up food shopping needs.

5.35 A high proportion of independent convenience stores remain in the city, in the most part dispersed across the more secondary shopping frontages. National convenience retailers, such as Greggs, Holland & Barrett and Thorntons, are also well represented and generally occupy positions closer to the prime pitch.

5.36 The city centre has a very strong comparison goods offering which reflects its role as a major city centre in the regional retail hierarchy. The shopping centres of Highcross and Haymarket and the interconnecting streets of High Street, Humberstone Gate and Gallowtree Gate represent the prime locations for comparison retailers, with the larger format units in these locations well suited to accommodating the requirements of the major retailers.

5.37 Since 2007, the amount of comparison goods floorspace within the city centre has increased by 12,930 sq.m, equating to an increase of 12.3%. This is largely as a result of the completion of the extension of the Highcross Shopping Centre in 2008. Comparison retailers occupy 41.6% of the city centre's total retail and leisure floorspace, well above the national average of 36.2%.

5.38 However, this is largely as would be expected in a major city centre. Comparison of our latest survey of the city centre in November 2014 with historic Goad data indicates that, since 2011, there has been a fall in the level of comparison floorspace within the city centre. A reduction of 24 comparison retail outlets is recorded over this time, with the comparison goods floorspace reducing by 13,320 sq.m (gross) from the level recorded in 2011.

5.39 In our estimation, there are a number of factors which have contributed to the recorded reduction in comparison goods floorspace over this time.

5.40 Firstly, changing market conditions in recent years have seen a number of national comparison goods retailers consolidating their high street presence. In Leicester, high profile retailers who have ceased trading in the city since 2011 include Peacocks, Currys and Millets. The Depot Extra, which formerly occupied 2,190 sq.m of floorspace within the Haymarket shopping centre, represents the largest comparison goods closure (in terms of floorspace) in the period between 2011 and 2014. Despite the loss of some national retailers, it is considered that new comparison retailers taking space within the city centre has in the most part ensured that the prime city centre retail stores have retained a healthy occupancy rate. In this regard, notable new comparison retailers opening in the city centre since 2011 include Superdry and Urban Outfitters.

5.41 Secondly, there has been a rise in the number of leisure service businesses (i.e. restaurants, cafes, restaurants, fast food outlets and so on) in recent years. In this respect, it is apparent that leisure uses in some more peripheral areas of the city have displaced previous retail uses. The number of leisure service premises has increased significantly since 2007, with 59 additional outlets opening between 2007 and the end of 2014.

5.42 The recorded drop in comparison floorspace can also be attributed to revisions to Goad's records since 2011, as the floorspace assigned to particular commercial units within the city centre has been updated over time. Accordingly, the recorded reduction in comparison goods floorspace in recent years should be viewed with some caution in this context.

5.43 As a proportion of total commercial units, leisure service outlets have increased from occupying 20.8% to 24.7% of the total units within the city centre. The city centre now exceeds the national average in this regard and is evidence of an improved leisure sector offering within the city centre. The development of the Showcase Cinema, as well as the cluster of around 20 restaurants/cafes which has been created around the new St Peter's Square has been the largest contributing factor to this increase. This area now has almost full occupancy, with only one unit being vacant at the time of our survey of the area.

5.44 The provision of retail service outlets has increased since 2007 from 97 to 118, in line with the trend seen nationally in this sector. These services now represent 10.9% of the total number of commercial outlets. The majority of these services are independent businesses, operating from small scale units. Whilst the proportion of retail services accommodate in Leicester city centre is below national average level, we consider that the overall retail service offer in the city centre is comprehensive and strong. In particular, hairdressers and beauty salons are provided in high numbers. Retail services commonly occupy units within the lanes around the St Martin's Square shopping centre and units proximate to Market Street, where unit sizes are generally small in scale and lend themselves well to such uses.

5.45 The provision of financial and business services has largely remained static over the last seven years. A marginal decrease has been recorded in terms of both the number of outlets operating within this sector and the extent of such floorspace within the city centre. This again accords with the position observed nationally over the same period. In terms of distribution, there is a focus of financial and business services around Horsefair Street and Halford Street. This is supported by further businesses within this sector locating in the more secondary streets in the southern part of the city centre. The majority of the major national retail banks have retained a presence in the pedestrianised heart of the centre around the Clock Tower.

Distribution of Activity

5.46 In terms of geographical distribution, the central pedestrianised shopping area along High Street, Humberstone Gate, Gallowtree Gate and East Gates accommodates an extremely high proportion of comparison shops. As already discussed, many of the stores in this location are larger format and they are almost all occupied by nationally operated high street brands, including a large number of clothes, jewellery shops and telephone shops. This part of the city centre also contains seven retail banks. However, there are very few convenience, retail service or leisure service operators. In addition, the vacancy rate is also at a generally low level.

5.47 Highcross shopping centre is also dominated by comparison retailers, including the Debenhams, House of Fraser and John Lewis department stores. Highcross is characterised by its high proportion of clothes, shoes, jewellery and mobile phone shops and has positioned itself as the principal location for premium goods within the city. The vacancy rate within the shopping centre is the lowest level within the whole city at 6.9%. The few vacant units that exist are found almost exclusively on the lower ground floor.

5.48 The shopping centre has a very limited number of convenience and retail service units, which in turn, occupy a relatively small proportion of the shopping centre's total floorspace. In addition to the strong comparison goods offer of Highcross, the eastern end of the lower ground floor level provides a cluster of cafes and takeaways within the indoor shopping environment. At the opposite end of the centre, the Showcase Cinema and the concentration of modern restaurant units formed around St Peter's Square together present a major leisure draw which plays an important role in supporting the city's evening economy.

5.49 The very significant extension to Highcross in 2008 has reaffirmed the role of the western side of the Central Shopping Core in respect of the provision of higher end retailers, with a higher representation of budget and convenience retailers apparent within the eastern half of the Central Shopping Core.

5.50 The Haymarket shopping centre contains approximately 78 retail units, over half of which are comparison retailers. There are many well known high street brands, including Primark, Ann

Summers, Boots, and TK Maxx accommodated in the centre. However, unlike Highcross or the central main shopping streets, there are also a number of foodstores, including Heron Foods and Tesco Express, as well as several smaller format convenience stores. As such, the convenience offer in the shopping centre is relatively strong.

5.51 The Haymarket also has an extremely low proportion of retail service and financial and business services units. The few leisure service units that are located within the shopping centre mainly face outwards onto Belgrave Gate, Humberstone Gate and Charles Street, although there is a nightclub and a large cafe on the first floor. There is a relatively high vacancy rate within the shopping centre, which at the time of our survey equated to 15.4% of all units. Although the ground floor contains a higher number of vacant units, the five vacant units on the first floor occupy a significantly larger floorspace and include the long term vacant Haymarket Theatre.

5.52 The area comprising mainly of independent units around St Martin's Square Shopping Centre and the surrounding lanes contain more or less equal proportions of comparison, retail service and leisure service uses, largely accommodated within small units. There is also a relatively high vacancy rate within this part of the city centre. However, the proportion of financial and business services units is extremely low and convenience stores are only found very occasionally. A similarly mixed composition of retail uses is found on the southern parts of Belgrave Gate, Churchgate and on Market Street, although Market Street has a slightly higher proportion of empty units.

5.53 Undoubtedly the main convenience offer within the Central Shopping Core is around the market area, which comprises the outdoor market, indoor market and the indoor food market. There are approximately 150 traders operating within a 0.8 hectare area of the city centre, with the Corn Exchange pub located in the centre. There are also traders selling comparison goods and providing leisure services (in the form of hot food takeaway businesses) from market stalls. However, these uses are not specifically reflected given the blanket convenience categorisation attributed to markets by Goad.

5.54 On Highcross Street, towards the far west of High Street, there is an area with an extremely high proportion of leisure service uses, which is comprised of numerous pubs, cafes, hotels and nightclubs. All other types of commercial unit are found in relatively low numbers in this location. The Showcase Cinema and restaurants around St Peter's Square are in close proximity and this part of the city centre is therefore characterised by its leisure services and evening economy.

5.55 A similar pattern is found in the more peripheral parts of the city centre's Central Shopping Core. The northern extents of Churchgate, Belgrave Gate, as well as Yeoman Street, King Street and Gravel Street, have extremely high proportions of leisure service uses, including hot food takeaways, pubs, restaurants and nightclubs. However, a pattern of high vacancy levels is also observed in many of these locations.

5.56 The southern part of the city contains Municipal Square, which contains nine banks and a number of other financial and business service units, such as solicitor's offices. In addition, there are three vacant bank buildings in one part of the square. There are very few other retail units in this location. Instead, the remaining buildings facing onto Municipal Square comprise the Leicester City Hall, Leicester Central Library, two separate advice centres and a tourist information office.

5.57 The southern parts of the city, notably along Belvoir Street, Granby Street, the western part of Halford Street and the southern part of Charles Street, all contain high proportions of financial and business services units. These units are predominantly occupied by estate agents and recruitment agencies. These streets also have a pattern of occasional retail service and convenience units and higher proportions of leisure service and vacant units.

Vacancies

5.58 The number of vacant units within a centre can provide a good indication of how a town is performing. However, care should be taken when interpreting figures as vacant units will be found in even the strongest of town centres as it is to be expected that there is some 'churn' in the market with units changing representation. However, on other occasions properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or are simply not being actively marketed. Conversely, a low vacancy rate does not necessarily guarantee that a centre is performing well. For example, if there is a proliferation of charity shops and other uses not usually associated with a town centre it may be a sign of decline, particularly where these uses are located in prime locations.

5.59 Many parts of Leicester's Central Shopping Core have a limited vacancy rate, ensuring a vibrant environment across most of the prime retail pitch. However, our survey of November 2014 (of the city centre as defined by Experian Goad) identified approximately 38,760 sq.m of vacant floorspace across 144 units within the city centre. This equates to 13.7% of floorspace and 13.2% of units being vacant, which compares to respective national averages of 9.7% and 11.4%. Accordingly, both the proportion of vacant units and the proportion of vacant floorspace in Leceister are above national average level.

5.60 Our survey of the city centre found that, in the most part, the prime shopping locations within the Central Shopping Core area (such as the Highcross shopping centre, High Street and Gallowtree Gate) experience a very low number of vacancies. However, the Haymarket shopping centre was found to have a relatively high number of vacant units, with a particular concentration on the first floor.

5.61 A significant reduction in the extent of vacant retail floorspace is recorded between the latest survey of 2014 and previous surveys of 2007 and 2011. However, a change in methodology has been introduced in respect of how Goad has recorded vacant floorspace since 2011. This change means that an exact comparison between the position at 2014 and previous survey data cannot be made. The change in methodology is believed to provide for a more accurate reflection of the extent of vacant retail floorspace from 2014, with the earlier methodology acting to overstate the identified vacancy rate.

5.62 Whilst the overall vacancy rate does give some cause for concern, there are relatively few sizable vacant units on the principal shopping streets and a number of the larger currently vacant units identified around Highcross shopping centre are known to be presently under offer.

5.63 The largest vacant unit identified in our November 2014 survey is the vacant Haymarket Theatre building which has a gross floor area of 2,350 sq.m. We believe that the theatre has been closed since 2006, with plans formulated in 2014 for the space to be taken on by a charitable organisation to run the building as a training centre for performing arts. To our knowledge, a viable use still remains to be agreed for the facility, with the building remaining a high profile vacant space in the heart of the city centre.

5.64 The Haymarket shopping centre shows indications of being a potential problem spot for vacancies. Our survey recorded that 11 of a total of 78 units, and the theatre space, were vacant. This represents a vacancy rate of 15.4%, with the vacancies including a number of the more sizable units within the shopping centre which span across two floors. The first floor level of the shopping centre, in particular, was found to have a concentration of vacant floorspace. However, reference to historical Goad data indicates that there were 19 vacant units in 2007 within the shopping centre, indicating that the position in this location has improved over recent years.

5.65 Other areas subject to particular concentrations of vacant units include Church Gate (13 vacancies), the pedestrianised areas of Market Street and Hotel Street (together providing a total of 10 vacancies), and Granby Street to the north of its junction with Belvoir Street and Rutland Street (six vacancies). Notwithstanding this, the evidence suggests that in these areas and across the city centre as a whole, there are fewer vacant units than in 2007. The distribution of vacant units within the city centre is also identified by the plan of Leicester city centre provided at Appendix 5.

Retailer Representation

5.66 The retailer representation indicator is an important sign of the vitality and viability of a centre as it demonstrates the existing and potential future level of operators in the locality. We have reviewed the number of national and independent retailers which are present within Leicester city centre, recognising that multiple retailers (such as Boots, Marks & Spencer and Primark) can act as anchor tenants in the centre and can add to its appeal and create additional pedestrian footfall.

5.67 The Venuescore 2013-14 UK Shopping Venue Rankings has also already been used to provide an indication of the retail hierarchy of Leicester and other nearby centres, using a weighted scoring system which takes account of the presence in each location of multiple retailers. Venuescore's rankings identify Leicester as being a key centre in the East Midlands region with a high street retail offer bettered only by Nottingham.

5.68 The available evidence suggests that Leicester city centre is performing well and continues to sustain a strong variety of both national and independent traders. It accommodates all of the 28 Experian Goad defined top comparison retailers. Indeed, a number of the top stores are represented on multiple occasions, reflecting the city centre's important role within the Study Area.

5.69 The key multiple retailers are concentrated within the middle of the Central Shopping Core. Highcross shopping centre contains 16 of the 28 stores, including John Lewis, Debenhams and House of Fraser. The Haymarket shopping centre has a further six major stores, including Primark, H&M and TK Maxx.

5.70 Many of the stores within the shopping centres also have an entrance onto Humberstone Gate and High Street, which form part of the traditional shopping streets in the city centre. These streets, along with Gallowgate, also accommodate a further 10 major comparison retailers, including Marks & Spencer, BHS, New Look and WH Smith.

5.71 The city centre distinguishes itself from other retail destinations in the wider area by accommodating a significant number of independent retail units, as well as the indoor and outdoor markets. In this regard, we note that new Food Hall was awarded the Great British Market Award for Best Food Market, which demonstrates its popularity and quality.

Pedestrian Flows

5.72 During our survey of the city centre in November 2014, we observed pedestrian activity and considered the movement of users within the area.

5.73 There is a particular concentration of pedestrian activity around East Gates and the Clock Tower. This is a natural focal point, being positioned directly between key retail destinations including the Market and both Highcross and Haymarket shopping centres. The pedestrianised streets of High Street, Humberstone Gate and Gallowtree Gate each connect with East Gates close to the Clock Tower and incur significant levels of pedestrian traffic.

5.74 To the north of the Clock Tower, activity is also particularly strong along Haymarket but quickly dissipates further along East Gates. A similar pattern of activity is seen on Churchgate; whilst its southern end occupies a prime location in terms of levels of pedestrian movement, the street experiences notably lower levels of pedestrian traffic the further north one travels.

5.75 The quality and range of major high street retailers on offer within the Highcross shopping centre serves as the focus for comparison (particularly fashion) shopping in the western half of the city centre. Highcross attracts very high levels of footfall across its entirety. Activity was found to be greatest during our visit on the lower ground floor level within the eastern side of the centre, where a number of fast food restaurants and takeaway outlets are located.

5.76 Data provided by Completely Retail indicates that the shopping centre has an annual footfall of 18 million, with an average dwell time of 82 minutes and the average visitor frequency being 4.3 times per month[32]. By way of comparison, the Bullring in Birmingham, which is of a slightly larger scale (accommodating 161 units compared to 120 units at Highcross), has an annual footfall of 40 million, records an average dwell time of 109 minutes and has an average visitor frequency of 3.4 times per month[1].

5.77 Along the newly formed streets of Bath House Lane and Highcross Lane – which are largely occupied by restaurants – footfall was unsurprisingly found to be lower than on principal shopping streets during daytime hours. However, the level of activity along these streets steadily increases into the evening.

[32] Completely Retail, March 2015

5.78 The Haymarket shopping centre has retained strong levels of pedestrian traffic, particularly on the ground floor. The presence of key retailers such as Primark and H&M evidently presents a substantial draw. At first floor level, the prevalence of vacant floorspace seems to impact on footfall, as fewer shoppers were persuaded to venture into this area. Pedestrian activity also appeared to derive from shoppers using the centre as a through route between the Haymarket Bus Station and Humberstone Gate.

5.79 Within the St Martin's Square shopping centre and the narrow pedestrianised streets that surround the centre, pedestrian flows were observed to be modest during day time hours. Pedestrian movement through this area was notably lower than High Street, despite being only a short distance away. This may be explained because of the higher proportion of leisure and retail service uses around St Martin's Square, when compared with those found on High Street and the other main pedestrian shopping streets within the city centre. A proliferation of leisure and retail service uses generally results in longer dwell times within units, but less pedestrian movement in the street outside.

5.80 Leicester Market is a popular attraction that acts to draw pedestrians south of High Street and Humberstone Gate. The level of footfall along Cheapside and Victoria Parade, which link the market's location to the principal shopping area, was found to be strong. During our visit to the market area, visitor numbers were observed to be healthy. Pedestrian activity has recently been bolstered by the addition of the new Food Hall, which seemed to be a particular popular part of the market's offer. The planned phase two development works at the market will include the re-instatement of new public realm following the demolition of the Market Hall building, as well as improvements to the market itself. This will also have a potential benefit for pedestrian activity within the wider area, as a new gateway into The Lanes area is to be provided adjacent to the Food Hall and through the Odeon Arcade.

5.81 Further south, the municipal area around Town Hall Square forms a transition from the principal retail core to the north and an area with a greater diversity of uses to the south. Along Horsefair Street and Bishop Street, pedestrian traffic was found to be relatively modest. Market Street and, to a lesser extent Belvoir Street, together serve to draw in pedestrian traffic through a mixture of national and independent retailers provided alongside a high proportion of leisure service operators. Pedestrian numbers in these locations were observed to be at a moderate level throughout the day.

5.82 Due to its distance from the activity found on High Street and at the Highcross and Haymarket shopping centres, the south western corner of the city's Central Shopping Core forms a shopping destination that is to some extent self-contained. This area has much lower levels of pedestrian activity than the busier parts of the city centre further to the north. Indeed, the drop in levels of pedestrian traffic experienced around Municipal Square and to the south of Leicester Market points to a slight separation between the shopping environments in the northern and southern halves of the Central Shopping Core.

5.83 In terms of pedestrian movements in the more peripheral areas of the Central Shopping Core area, the northern extents of Church Gate and Belgrave Gate experience very low levels of activity, with St Margaret's Bus Station forming the key draw for movement in this area. To the south, Granby Street acts as the main gateway route into the city centre from London Road and the railway station. As a consequence of this footfall, the retail frontage has extended further along this road than may have otherwise been the case.

5.84 Recently completed and scheduled development projects within the city centre through the 'Connecting Leicester' scheme provide clear opportunities to increase footfall in some of the quieter areas of the city centre, particularly those which can benefit from their proximity to the market.

Accessibility

5.85 The accessibility of a centre is determined by the ease and convenience of access by a choice of means of travel – including that which is provided to pedestrians, cyclists and disabled people – and the ease of access from the main arrival points to the principal attractions in the centre.

5.86 Leicester is a regional rail destination and is a stopping point for express services to London, Birmingham and Sheffield. There are also direct hourly services to several local destinations, including Syston, Sileby, Barrow-on-Soar, Loughborough, South Wigston, Narborough and Hinckley. Train services provide a fast and reliable route from these local destinations to the city centre at around £5 for an adult return ticket.

5.87 The railway station is located to the south-east of the Central Shopping Core. There is long-stay car park to the north-west of the station and the main pick-up and drop-off point, as well as the station's bus stops, are located on London Road.

5.88 The railway station is approximately 140 metres walking distance to the south western corner of the Central Shopping Core Boundary. St Georges Way stands as a large physical barrier between the two. However, a new scheme has recently been completed to improve the connectivity between the station and the city centre, which included the replacement of the former pedestrian underpass with a wider pedestrian 'supercrossing' and public realm improvements. As a consequence, the new arrangement represents a considerable improvement on the previous means of access.

5.89 The city centre has two principal bus interchanges, Haymarket bus station and St Margaret's bus station, both of which are located in the northern half of the city centre. St Margaret's serves Intercity and National Services as well as the Local Arriva Bus company. Haymarket provides local services and predominantly serves the First Bus company. The more central terminal is the Haymarket bus station, which is currently undergoing a major redevelopment to provide increased bus capacity in a new bus station with public realm improvements. The redevelopment of the bus station will be complete by the end of 2015. Once completed, the development will provide an attractive and modern terminal that will be well positioned to provide convenient access to the heart of the city centre, particularly the principal shopping streets.

5.90 Haymarket bus station is ideally located to serve the city's needs, with users able to directly access the pedestrianised environment of Haymarket shopping centre and Humberstone Gate West. The improvement works will allow existing bus stands currently located on Charles Street to be moved into the bus station, reducing congestion and improving pedestrian and road safety.

5.91 St Margaret's bus station on Gravel Street is located within the northern part of the city centre, beyond the Central Shopping Core. This station is the National Express interchange for the city, being the main departure and arrival point for inter-city coaches and county-wide services, as well as being the end destination for the Arriva bus company. The 24 hour Skylink bus service between the city centre and East Midlands Airport also operates from this station.

5.92 As an entry point into the city, the St Margaret's bus station is not ideally situated. The station's location is clearly separated from the main activity within the city centre. There is a lack of retail frontage between the bus station and the principal shopping activity found on Church Gate, which seems to add to the degree of separation between the two areas. The walk to the main areas of activity within the city centre is relatively substantial, particularly for visitors with luggage or mobility difficulties.

5.93 The station itself underwent a refurbishment in 2007 and electronic passenger information boards are now in place. The station remains in relatively good condition. However, although some signposting is in place, the most direct route towards the city centre is not apparent on arrival at the bus station and there is a lack of a clearly defined pedestrian route. In addition, visitors are required to navigate a number of streets of relatively poor environmental quality to reach the main shopping area within the city centre. This is not helped by the low number of premises along the route that have an active frontage, which may also have otherwise acted as a visual aid to help guide and encourage pedestrians towards the city centre.

5.94 An enlarged bus stop on Causeway Lane has been created to specifically serve Highcross. The majority services travelling through this destination continue onto either the Haymarket or St Margaret's bus stations

5.95 The city centre is well connected to the strategic highway network. The Central Shopping Core is located within the centre of the inner ring road (A594). This connects to various radial roads to the surrounding communities, the outer ring road (A563) and the M1 and M69 motorways to the west. However, the roads around the city centre are busy and can become heavily congested, especially around the rush hour periods of the day.

5.96 The city centre is served by three park and ride bus facilities, which collectively provide around 2,500 parking spaces. The car parks are connected to the city centre by a bus service known as the Quicksilver shuttle service. The park and ride facilities are located at Birstall (1000 spaces to the north of the city), Enderby (1000 spaces to the south-west) and Meynell's Gorse (500 spaces to the west). The cost is £3.00 for an adult day ticket. Concessionary fares are also available. The services operate every 12 to 15 minutes from 7am to 7pm, six days a week (there is no service on Sundays).

5.97 There are circa 11,500 car parking spaces within the city centre. The city centre is divided up into four 'parking zones' representing the north, south, east and west of the city centre. There is a reasonably even distribution of car parking across the city centre with a choice of provision in each zone. The car parks are generally well signposted from the approach roads into the city centre. In addition, there are numerous digital parking signs indicating the location of the nearest multi-storey car park and how many spaces are available.

5.98 There is a limited amount of on-street parking provision close to the shops within the city centre. The level of provision increases with distance away from the central shopping area. The spaces all have limited wait pay and display restrictions. The time limitations vary up to a maximum of two hours. However, parking charges are set at £1.00 for one hour and £3.00 for two hours. This allows a high turnover of customers whilst providing enough time for a short shopping trip. On street parking is free after 6pm to encourage the night time economy.

5.99 There are 10 multi-storey car parks within the city centre and numerous surface level car parks that provide both long and short stay parking facilities. Three of the multi-storey car parks are council operated, whilst the remainder are private, including six NCP car parks. Parking charges for these facilities differ across the city. The Council operated car parks appear to offer best value for money following a recent review and simplification of their parking charges. For example, the Haymarket and Newark Street multi-storey car parks offer one hour for £1.00 and up to six hours for £6.00. However, depending on the chosen NCP car park the charges vary, primarily being between £2.60 and £3.50 for one hour and £12.00 and £14.00 for up to six hours. Notwithstanding this, the multi-storey Abbey Street and Lee Circle NCP car parks do offer 24 hours for £3.80, albeit in locations slightly further away from the main shopping areas. Despite lower charges, these two facilities are largely unpopular, no doubt reflecting their secondary location and the less attractive environment they offer.

5.100 Blue Disabled Badge holders are able to park for free in any of the Council operated car parks or on street parking bays. The provision of dedicated on-street disabled parking bays around the city centre also seems to be generally well distributed and, based on the number that were empty during our survey of the centre, provided in sufficient quantities to cater for demand. There is a Shopmobility service for less mobile visitors to the city centre. This enables disabled people to loan motorised wheelchairs, scooters and powerchairs without charge. Membership is required, but there are two Shopmobility hubs located within the Highcross and Haymarket shopping centres.

5.101 The city centre is generally a disabled person friendly environment. Seating is provided at regular intervals, allowing people to stop and rest whilst shopping. The centre itself is also relatively flat and much of it is pedestrianised. The city centre has a vehicle access restriction, which limits the amount of traffic around the shopping area. This works well to limit the occurrence of pedestrian and vehicle conflict, whilst also reducing the amount of noise and air pollution within the shopping area.

5.102 Most footways are of a generous width and many have been extended to provide additional space. The footway materials also appear to aid mobility, with flat paved surfacing chosen over sets or other raised features that may be obstructive for wheelchair users on most new surfacing. However, the footways in the more peripheral parts of the shopping area are often of a significantly weaker standard than those within more central locations.

5.103 As part of the street improvements under the 'Connecting Leicester' project, works have relatively recently been completed on Humberstone Gate East which has involved footpath widening, new surfacing and the repositioning of bus stops. This work has upgraded the appearance and street quality in this location as well as improved accessibility for pedestrians and cyclists along this gateway into the city centre.

5.104 There are further plans to further improve the pedestrian environment of Newark Street, Applegate, Berridge Street, Guildhall Lane, Peacock Lane, Hotel Street, Grey Friars and St Martins. These schemes will see a mixture of repaving, footpath widening, additions of trees and seating areas, improvements to linkages between key pedestrian and cycle routes within the city centre and enhancements to the inner ring road crossing points. This scheme will be complemented by the creation of a new public transport corridor, which will remove buses from pedestrianised areas. However, the centre of Leicester is relatively easy for most to navigate on foot and is generally a pleasant environment for pedestrians.

5.105 A 'Bike Park' is located close to the main shopping area under the Town Hall in Town Hall Square. This is a secure indoor cycle parking facility with showers, changing facilities. Repairs can also be undertaken whilst people are at work and the centre also offers bike hire and a shop for buying cycle accessories and bikes. A new secure cycle parking facility for 222 bicycles is also provided at Leicester railway stations, which also incorporates a changing room.

5.106 There are over 20 dedicated on street cycle parking locations within the main shopping area. These principally comprise stands of Sheffield cycle hoops. The locations of the cycle parking facilities are generally within prominent positions within the street, adding to their security. There are also a number of cycle routes through the city centre and the numerous vehicle restricted roads lend themselves well to providing safe routes for cycling. In addition, measures are being installed on many of the city centre roads to increase priority for cyclists. For example, Granby Street has recently become one way and a contraflow cycle lane has been installed, which improves the linkages between the city centre and the railway station.

Perception of Safety

5.107 The sense of safety and security within the different parts of the city centre is considered to generally be good. The Council has invested approximately £4 million into the surveillance of the city centre in the last five years and there are over 2,000 CCTV cameras monitoring the city centre, which reportedly gives Leicester a more concentrated CCTV coverage than anywhere else in the country. Despite this, the security cameras seem to be discreetly located so as not to suggest to visitors that crime is a particular issue within the centre. The security cameras also help the authorities react quicker to incidents and provide evidence to bring offenders to justice, which gives people confidence that the city is a safe location to visit.

5.108 The quality of the built environment has a direct link to an area's sense of safety and security. As discussed in more detail below, a number of regeneration and public realm improvement initiatives have greatly improved the city centre's built environment and, in so doing, its sense of safety and security. A good example of one such scheme is the removal of a pedestrian underpass beneath the inner city ring road on the route between the railway station and the city centre. A new 'supercrossing' has been installed with additional lighting and CCTV cameras and the level of safety in this location has consequently improved.

5.109 There has also been a concerted effort to improve lighting within the city centre. New lighting has often been installed in inventive ways that illuminate the city's built heritage and other assets whilst also being functional in making the streets safer for pedestrians during hours of darkness. The city centre today generally feels a safe place to walk around at night, although there are some less frequented areas that people would quite possibly feel less comfortable about walking through, particularly in the more peripheral parts of the centre.

5.110 The middle of the Central Shopping Core around the area close to East Gates has a particularly good sense of safety and security. This is the busiest part of the city centre and the streets have an open character and are generally well maintained. The large numbers of people using this area provide a constant presence within the street, which enables a high level of natural surveillance to be maintained.

5.111 The two areas of the city centre that in our view achieve the best sense of safety for shoppers are the Highcross and Haymarket shopping centres. Again, both shopping centres receive high levels of patronage and the associated natural surveillance benefits that come with this. The shopping centres are well lit throughout their hours of operation and there are few dark corners which might encourage criminal or anti-social activity. The highly managed environment, with monitoring provided by security cameras and a visible presence of security staff in both locations, helps to engender a feeling of security.

5.112 The older part of the city centre between High Street and the markets also appears to be safe and secure. Although this is a quieter part of the city, the building frontages are very close to the street and the shop windows provide good levels surveillance within the street. This area also has a particularly high quality built environment, which also contributes towards the sense of security.

5.113 The upgraded physical environment around the established Cultural Quarter (focused around Halford Street and the eastern end of Rutland Street) has helped to engender a good feeling of safety and security within this locality. The partly pedestrianised environment of Halford Street, alongside the presence of bars and cafes, which incorporate outdoor seating areas, help to provide a vibrant environment in this area of the city.

5.114 The fringe areas around the Central Shopping Core broadly fall into two areas, to the north and to the south of the main shopping area. The northern fringe area is considered to principally comprise New Bond Street, Gravel Street, Mansfield Street and the northern parts of Churchgate and Belgrave Gate. The southern fringe area principally comprises Belvoir Street, Rutland Street, Northampton Street and the southern part of Granby Street. The fringe areas have much lower patronage than the more central shopping areas. In addition, the side streets often lead into surface level car parking and other lower quality development. The shop frontages in these locations are in some instances of a poorer standard than elsewhere in the city centre. This has an impact on perceptions of safety and security.

5.115 The multi-storey car parks on Abbey Street and at Lee Circle, along with the streets which surround these car parks, are of a generally poor environmental standard and do not encourage a sense of safety and security. These car parks are thought to be relatively unpopular, with numerous surface car parks available in the city and modern facilities such as those at Highcross appearing to be favoured, which contributes to lower levels of activity within these more dated facilities.

5.116 Notwithstanding this, some of the fringe areas within the city do have successful retail frontages that create engaging environments. Locations such Granby Street, for example, which has a generally pleasant street environment with healthy levels of activity, provides a good perception of safety for pedestrians. In addition, there are also parts of the fringe areas where public realm improvement schemes have been completed, which greatly assist users' perceptions of safety, and further streets are earmarked for improvement.

City Centre Environmental Quality

5.117 Leicester's environmental quality varies considerably across its Central Shopping Core. The city has a strong industrial heritage, particularly around the city centre. However, the city was heavily bombed during the Second World War and some of the post-war developments that were subsequently brought forward now look somewhat tired and in need of refurbishment or redevelopment. Despite this, the city centre also contains a wealth of high quality modern and old development of great environmental value. This is exemplified by the presence of seven separate conservation areas within the Central Shopping Core.

5.118 One such example is the Market Place Conservation Area, which incorporates Silver Street and Cank Street. This older part of the city has an array of architectural styles on display. The narrow winding streets are full of character and the historic building fabric blends well with the newly installed public realm improvements.

5.119 There have also been a number of successfully completed high profile regeneration projects in recent years. The Highcross shopping centre redevelopment was completed in 2008 at a cost of £350 million, providing a new landmark building of a high design quality. In addition, the Cultural Quarter has seen the development of the iconic Curve Theatre and the Phoenix Cinema, as well as a number of cafes, bars, restaurants and other commercial developments.

5.120 A catalyst of the city centre's regeneration has been investment in public realm projects. Recent improvements have seen the removal of street clutter and enhancements to the setting of Leicester's famous Clock Tower on East Gates. Much of the central part of the city centre has now been pedestrianised, which creates a safe and attractive environment for people to shop and enjoy the city centre. The removal of buses from High Street in particular has opened up this part of the centre to new uses, including street cafes and public seating areas. High Street has also been lined with an avenue of large trees, which add greatly to the character of the area by providing greenery within the streetscape.

5.121 As previously identified, improvements have also been completed between Granby Street and the railway station in the form of the 'supercrossing' which now enables people to safely cross this busy section of road. In addition, this gateway to the city has also been improved with new planting and street furniture and the width of the ring road has also been reduced. Further recent public realm improvement schemes have also been carried out on Halford Street, Wharf Street North, Humberstone Gate, Market Place Approach, Market Street, Gallowtree Gate and Hotel Street which have greatly improved the pedestrian environments in these locations.

5.122 The Council has a flagship scheme, known as 'Connecting Leicester', which seeks to better link the city's shopping, leisure, heritage, housing and transport facilities. The primary aspiration of the scheme is an ongoing drive to create a pedestrian friendly environment and reduce the dominance of roads and traffic within the city centre. The main projects are as follows.

- A £4 million scheme to create the new Jubilee Square (adjacent to St Nicholas Circle) that is able to accommodate outdoor events. The scheme has new landscaping, street furniture and lighting and has enhanced the city's historic fabric. The project was completed in early 2015.
- A £9.2 million scheme to redevelop the market area. The indoor market will be replaced by a new public square and an extension to the Corn Hall. This will be completed in 2015. The new Food Hall has already been completed.

- A £2.5 million project to create the Cathedral Gardens in between the Cathedral and St Martin's House. This project has seen the creation of a high quality through route.
- The £13.5 million redevelopment of the Haymarket bus station. The scheme is scheduled to be completed in late 2015. The measures involve the removal of a roundabout at the junction of Charles Street and Belgrave Gate, increased footpath widths, more public open space, planted areas and street furniture, as well as the relocation of bus stands to the new Haymarket bus station.

5.123 It was apparent during our visit to the city centre in November 2014 that there was very little evidence of litter or any other significant issues detracting from Leicester city centre's environmental quality. Litter pickers were also observed and their work appears to be effective at helping to ensuring that the centre is well maintained and assisting in ensuring that Leicester remains a safe and pleasant centre to visit.

SWOT Assessment (Strengths, Weaknesses, Opportunities, Threats)

5.124 As a consequence of our survey work, we consider that the principal strengths, weaknesses, opportunities and threats to the centre are as follows.

- **Strengths**
  - There is a diverse range of national and independent retail stores and markets which helps to distinguish the city centre from other competing destinations and is likely to help attract visitors from a wide catchment area;
  - The principal shopping areas within the city centre have a relatively healthy occupancy rate, with evidence of there being fewer vacant units across the Central Shopping Core than at 2007;
  - The city centre environment is largely of a high quality and is generally well maintained which complements the historic buildings and features of the city;
  - The city centre achieves strong levels of footfall on the principal shopping streets;
  - Council investment initiatives, including 'Connecting Leicester' have served to improve the physical environment and accessibility within specific areas of the city centre;
  - There is a varied leisure and cultural offering found within the city centre, much of which is accommodated in modern accommodation;
  - The city centre's commercial floorspace appears well suited to meeting the existing demands of modern retailers with a strong range of both larger floorplate units necessary to meet the needs of key national retailers provided alongside good quality smaller units appropriate to accommodating independents;

- Major private sector investment has being secured in the city centre since the 2007 Retail Study, (principally through the extension of Highcross), illustrating investor confidence;
- The John Lewis department store provides a major new retail draw and has extended the shopping offer of Highcross, serving to attract further activity and investment interest to the north western corner of the city centre.

- **Weaknesses**
  - Connectivity and legibility between St Margaret's Bus Station and the activity associated to the principal shopping areas at the heart of the city centre is limited, with potential for this to be improved;
  - The outer ring road serves to limit the capacity of the city centre to expand beyond this physical boundary and restricts connections with the wider area;
  - Some of the more peripheral areas of the city centre, particularly within the north of the centre, attract limited levels of activity and frequently include commercial units which have a relatively poor visual appearance.

- **Opportunities**
  - The redevelopment of the Haymarket bus station is currently progressing. Once completed, the redevelopment will aid accessibility in the city centre and improve the physical environment along Charles Street;
  - Further improvements around Leicester Market, to include an extension of the Corn Hall and the creation of a new public square, provides opportunities to stimulate additional interest and activity around the market area.

- **Threats**
  - The long term vacant Haymarket Theatre remains an issue, for which an active use remains to be found;
  - The ageing car parks facilities at Abbey Street and Lee Circle are considered to have a poor physical environment which is generally in a relatively poor state of repair. These facilities do help to engender a strong perception of safety and security for users.

Hierarchy of Centres and Role of Town, District and Local Centres and Neighbourhood Parades

5.125 Beneath Leicester city centre, there are a range of smaller centres across the two local authority areas that perform different roles in the retail hierarchy. It is important that an appropriate hierarchy of centres is identified within both the Leicester and Blaby administrative areas in order that residents' day to day retail, service and civic needs are provided for in accessible locations.

5.126 This identification and maintenance of an appropriate retail hierarchy should encourage sustainable shopping patterns as households will not have to travel far to meet their day to day needs, thereby reducing overall journey lengths. This approach should help to ensure that lively, thriving places to live and visit are supported, which provide for the retail and service needs of the local population (including facilities such as doctor's surgeries and libraries). The creation of a network of centres is particularly important in order to support less mobile and more vulnerable members of the community.

5.127 In order to inform retail policy formulation, we have reviewed the existing centres in the Leicester and Blaby administrative areas to identify the role performed by each retail venue in practice. As we set out in greater detail below, we consider that an appropriate retail hierarchy will identify city, town, district and local centres, complemented by a tier of neighbourhood parade. Our assessment has involved the undertaking of a survey of each centre which was undertaken in October and November 2014.

5.128 In order to determine the classification of each centre, it is necessary to consider the role and definition of city, town, district and local centres, as well as neighbourhood parades.

5.129 In this regard, it should be noted at the outset that the NPPF and accompanying Ensuring the Vitality of Town Centres National Planning Practice Guidance fail to provide any definition of – or differentiation between – the various types of centre which comprise a hierarchy. Whilst we recognise that Planning Policy Statement 4: Planning for Sustainable Economic Growth (PPS4) has been replaced by the NPPF it nevertheless remains the most recent national policy document providing such definitions and, given the effective current policy vacuum, is of some relevance.

5.130 Annex B of PPS4 indicates that city centres:

'...may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions.'

5.131 Annex B identifies that town centres:

'...will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market

towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas.'

5.132 It indicates that district centres:

'...will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.'

5.133 Finally, Annex B of PPS4 indicates that local centres will:

'...include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.'

5.134 Both PPS4 and, more importantly, the NPPF indicate that a small parade of shops of purely neighbourhood significance will not comprise a 'centre'.

5.135 In this regard, the Communities and Local Government research paper entitled Parades of Shops – Towards an Understanding of Performance & Prospects (June 2012) defines a neighbourhood parade as:

- a group of five to approximately 40 shops in one or more continuous rows;
- has a mainly local customer base, with strong links and local visibility, rather than being somewhere people would travel a significant distance to shop at;
- has a number of independent small or micro-businesses with some multiples (Tesco Metro, Sainsbury's Local, Boots) and symbol affiliates (Spar, Londis, Budgens etc); and
- being largely retail based (convenience stores, newsagents, greengrocers, bakers etc) though may include some local services (hairdressers, cafe etc).

5.136 The research paper also notes at paragraph 2.2.5 that neighbourhood parades have often become a 'hub' for other non-retail services and social provision, including health centres, community centres and libraries. It is explained that such uses add to the draw and diversity of neighbourhood parades, extending their role as a focus for residential communities.

5.137 In our view, there appears to be some overlap between the CLG research paper's definition of a neighbourhood parade and the type of retail and service venue that would ordinarily be considered a local centre. Accordingly, we consider that it is important to differentiate between the two given the Government's clear instruction that neighbourhood parades will not constitute a 'centre'.

5.138 It is our view that neighbourhood parades will usually comprise a short linear row of shops that help serve the day to day needs of the immediate residential population. On some occasions, a neighbourhood parade could be formed by two rows of limited length. The retail units forming part of the parade are likely to be small in scale, with the majority of units either providing a convenience function or a service likely to be required on a day to day basis, such as a takeaway or a hairdresser. They ordinarily do not accommodate any substantial convenience goods shopping provision. Neighbourhood parades will primarily serve a tight catchment which is in walking distance. Only limited parking is likely to be available, which may take the form of roadside 'pull in' spaces.

Centre Classification

5.139 In order to determine whether each of Leicester and Blaby's current centres exhibit the characteristics of a district or local centre or a neighbourhood parade, we have produce a matrix recording the main characteristics of each centre (based on the existing centre boundaries). The matrix is provided at Appendix 6 of this report.

5.140 Surveys of each centre were undertaken in October and November 2014 and have been used to determine the key facilities in each centre. We recorded whether each centre included the following retail uses and services: superstore; supermarket; convenience store; pharmacy; Post Office; ATM; bank; building society; and, restaurant/cafe.

5.141 For each identified retail and service facility in the centre, one point was awarded. The exception to this was in the case of a supermarket or superstore, where two points were awarded for a supermarket and three points awarded for a superstore. Given the important contribution that community facilities make to the vibrancy of centres and to meeting needs, a further point was awarded for each of the following community facilities: library; doctor's surgery/health centre; dentist; community centre; and leisure centre/cinema.

5.142 The matrix has been referred to in assessing whether a centre is performing the function of a town, district or local centre, or whether it is more accurately performing the role and function of a neighbourhood parade. However, we have also referred to the findings of each health check assessment and have used our judgment to form a view as to the role and function of each venue.

Accordingly, the matrix is instructive to our recommendations, but we have taken note of all relevant factors in appraising each venue and determining its categorisation.

Town and District Centres

5.143 At present, there is one designated town centre in the Leicester administrative area – Beaumont Leys – as well as five district centres. Blaby District currently has one town centre – this being Blaby itself – and three district centres. A detailed assessment of each of these centres is provided at Appendices 3 and 4, but a summary of the role, function and performance of each centre, which draws on our visits to the centres in October and November 2014, is provided below. We first provide an overview of Leicester's town and district centre, before then undertaking the same exercise for Blaby's.

Beaumont Leys Town Centre

5.144 Beaumont Leys town centre is the largest retail centre in the north of the Leicester administration area. The centre has a very strong representation of national retailers and a low vacancy rate, and, as identified below by Tables 5.4 and 5.5, mainly functions as a destination for convenience and comparison shopping trips. Beaumont Leys provides a relatively limited number of leisure and financial services.

5.145 The centre appears vibrant and is trading well. The centre's physical environment is good, particularly within the shopping centre itself, which is well maintained with shop fronts of a modern appearance. However, the outdoor market in particular would benefit from an upgrade to its appearance.

5.146 Visitors appear to primarily access the centre by car (there is extensive free car parking), but a number of bus services also provide convenience access. Overall, Beaumont Leys is considered to be a popular and healthy town centre with a suitably diverse offer. Its relatively strong performance is exemplified by a relatively low vacancy rate and strong levels of pedestrian footfall.

5.147 Beaumont Leys Library and Leisure Centre are located adjacent to the existing town centre boundary and, given that these are both main town centre uses, we recommend that the boundary is extended to incorporate these facilities, which provide a complementary attraction for visitors.

Table 5.4: Beaumont Leys Town Centre Diversity of Use for Commercial Units

Beaumont Leys Units	Total Units	Percentage	National Average
Convenience	6	11.3%	8.4%
Comparison	25	47.2%	32.5%
Retail Service	11	20.8%	14.1%
Leisure Services	6	11.3%	22.4%
Financial & Business Services	2	3.8%	10.9%
Vacant	3	5.7%	11.4%
Total	**53**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Table 5.5: Beaumont Leys Town Centre Diversity of Use for Floorspace

Beaumont Leys Floorspace	Total Floorspace (sq.m)	Percentage	National Average
Convenience	12,800	43.7%	15.0%
Comparison	12,760	43.6%	36.2%
Retail Service	1,660	5.7%	7.4%
Leisure Services	1,330	4.5%	23.2%
Financial & Business Services	340	1.2%	8.2%
Vacant	400	1.4%	9.3%
Total	**29,290**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Belgrave Road District Centre

5.148 The Belgrave Road district centre is a unique retail and leisure destination, which is located along a one mile stretch of Belgrave Road and Melton Road, known as 'the Golden Mile'. The centre sits approximately 1 kilometre north of Leicester city centre, along a key arterial route into the city. A break in the shopping frontage occurs mid-way along the centre, with a stretch of residential properties dividing the shopping environment into two separate definable areas.

5.149 Belgrave Road district centre comprises the second largest centre in the Leicester administrative area in terms of the number of units (there is a total of 328 commercial units) and is the third largest in terms of the quantum of gross floorspace (32,050 sq.m). The centre primarily meets the day to day needs of the surrounding community, particularly in relation to the large number of shops selling convenience goods and the significant number of community facilities within and surrounding the main shopping area. However, the Golden Mile also has regional, national and international importance, as it is also the focus of specialist Asian goods and services, as well as key festivals and celebrations. Furthermore, as set out below by Tables 5.6 and 5.7, the centre provides a relatively balanced mix of convenience and comparison goods retailers, and retail, leisure and financial services.

5.150 The majority of businesses are independently operated, with a limited number of national retailers present. Shop units vary in size, with the majority being accommodated in small terrace units. The centre generally appears to be vibrant and is largely in a healthy state. However, the environmental quality would benefit from some improvement and there are currently a number of regeneration projects underway that will go some way to addressing this issue (including the redevelopment of land at the former Sainsbury's supermarket site and at the junction of Belgrave Road and Cooper Street).

5.151 Given the centre's large number of shops, community and leisure facilities, we consider that Belgrave Road appropriately performs the role of a district centre.

Table 5.6: Belgrave Road District Centre Diversity of Use for Commercial Units

Belgrave Road Units	Total Units	Percentage	National Average
Convenience	35	10.7%	8.4%
Comparison	109	33.2%	32.5%
Retail Service	52	15.9%	14.1%
Leisure Services	60	18.3%	22.4%
Financial & Business Services	56	17.1%	10.9%
Vacant	16	4.9%	11.4%
Total	**328**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Table 5.7: Belgrave Road District Centre Diversity of Use for Floorspace

Belgrave Road Floorspace	Total Floorspace (sq.m)	Percentage	National Average
Convenience	2,520	7.9%	15.0%
Comparison	13,510	42.2%	36.2%
Retail Service	2,680	8.4%	7.4%
Leisure Services	6,760	21.1%	23.2%
Financial & Business Services	4,980	15.5%	8.2%
Vacant	1,600	5.0%	9.3%
Total	**32,050**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Evington Road District Centre

5.152 Evington Road district centre is located approximately 1.5 kilometres to the south-west of the city centre. The centre is surrounded by dense terraced housing and has a large population of ethnic origin. The shopping area contains 11 national operators and the vacancy rate is very low. As Tables 5.8 and 5.9 identify, the centre has a high proportion of floorspace and units dedicated to convenience uses and there is wide variety of goods and services on offer in the centre.

5.153 Pedestrian activity is generally quite high throughout the shopping area and is highest within the western part of the centre, where most of the national multiple operators are found. The eastern part of the centre is more peripheral, but there is a general sense of safety and security throughout the centre.

5.154 Evington Road generally has good all-round accessibility and there is good provision of bus services and bus stops. The centre also has excellent pedestrian accessibility. Outside of rush hour, the centre has good vehicular accessibility, as the centre benefits from good connectivity to the surrounding areas and the level of parking provision is also good. However, provision for cyclists could be improved.

5.155 The centre's environment is of mixed quality. The busy road has a large impact on the shopping environment. There are also very few planted areas, trees or other greenery within the centre. However, the retail frontage has a reasonable visual appearance and there is good street furniture throughout.

5.156 Given the number of units and the range of goods and services on offer in relation to the level of provision in the surrounding area, we consider that Evington Road appropriately performs the role of a district centre.

Table 5.8: Evington Road District Centre Diversity of Use for Commercial Units

Evington Road Units	Total Units	Percentage	National Average
Convenience	18	19.8%	8.4%
Comparison	20	22.0%	32.5%
Retail Service	15	16.5%	14.1%
Leisure Services	25	27.5%	22.4%
Financial & Business Services	10	11.0%	10.9%
Vacant	3	3.3%	11.4%
Total	**91**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Table 5.9: Evington Road District Centre Diversity of Use for Floorspace

Evington Road Floorspace	Total Floorspace (sq.m)	Percentage	National Average
Convenience	2,050	29.6%	15.0%
Comparison	1,460	21.1%	36.2%
Retail Service	670	9.7%	7.4%
Leisure Services	1,740	25.1%	23.2%
Financial & Business Services	810	11.7%	8.2%
Vacant	200	2.9%	9.3%
Total	**6,930**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Hamilton District Centre

5.157 Hamilton district centre is a modern shopping development anchored and designed around a Tesco Extra superstore. Alongside the Tesco store is a single parade of six smaller commercial units. The centre also includes Hamilton Library and Learning Centre and the Johnson Medical Practice, which are located in modern purpose built accommodation. The centre is served by a large surface car park and is located approximately 5.5 kilometres to the east of the city centre within a substantially residential area.

5.158 Whilst the centre contains only two national operators, the Tesco Extra is a particularly large superstore and incorporates a pharmacy, opticians, mobile phone shop and a cafe. The limited number of occupied units and relative dominance of Tesco in the centre is identified in the below Tables 5.10 and 5.11. Furthermore, whilst there is a healthy level of pedestrian activity around the centre throughout the day, the potential for linked trips is considered to be weak because of the centre's limited retailer representation. Moreover, the smaller commercial units within the centre appear to be failing and detract from the quality of the environment.

5.159 We do not consider that Hamilton provides the range of retailer representation we would ordinarily expect in a typical district centre: it is not able to offer a particularly extensive range of shops or services; it does not currently support an evening economy; and, it accommodates no substantial civic function.

5.160 Accordingly, we recommend that consideration be given to whether the centre should be re-allocated as a local centre.

Table 5.10: Hamilton District Centre Diversity of Use for Commercial Units

Hamilton Units	Total Units	Percentage	National Average
Convenience	1	14.3%	8.4%
Comparison	0	0.0%	32.5%
Retail Service	1	14.3%	14.1%
Leisure Services	1	14.3%	22.4%
Financial & Business Services	0	0.0%	10.9%
Vacant	4	57.1%	11.4%
Total	**7**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Table 5.11: Hamilton District Centre Diversity of Use for Floorspace

Hamilton Floorspace	Total Floorspace (sq.m)	Percentage	National Average
Convenience	9,542	86.4%	15.0%
Comparison	0	0.0%	36.2%
Retail Service	910	8.2%	7.4%
Leisure Services	119	1.1%	23.2%
Financial & Business Services	0	0.0%	8.2%
Vacant	472	4.3%	9.3%
Total	**11,043**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Narborough Road District Centre

5.161 Narborough Road district centre is located to the south-west of Leicester city centre, along a key arterial route into the city. The commercial centre is linear in nature, spanning a distance of around half a kilometre, and is principally surrounded by dense terraced housing. The centre is the second largest in the Leicester authority area in terms of the amount of floorspace and the third largest in terms of the number of units. In addition, there are 22 national operators within the shopping area, including four larger food operators and five banks.

5.162 As Tables 5.12 and 5.13 help identify, whilst there is a particularly strong convenience, leisure service and financial and business services offer in the centre, the comparison goods representation falls short of the national average level by some distance. Notwithstanding this, the centre provides a number of key community services and facilities and meets many of the needs of the surrounding community.

5.163 Overall, the centre appears to be in reasonably good health. Its vacancy rate of 7.0% is well below the national average of 11.4%. In addition, pedestrian activity throughout the shopping area is at a reasonable level, although Hinckley Road, Braunstone Gate and the southern tip of the centre appear to be significantly quieter. However, given the concentration of bars, restaurants and pubs on Braunstone Gate, it is expected that this part of the centre has a strong evening economy.

5.164 Accessibility within and to the centre is also generally good. There is an excellent bus service throughout the shopping area and the centre is located within walking distance of a large population. The level of cycle parking provision is also good, although the level of vehicular accessibility varies according to the time of day.

5.165 There do not appear to be any major safety and security concerns within the shopping area, although there are a few locations where the level of surveillance could be improved. In addition, the centre's environmental quality is reasonably good throughout, although the traffic does have a negative impact on the shopping environment and a small number of locations have been identified as being in need of improvement.

5.166 Given the size of the centre and the level of goods and services on offer, it is considered that the Narborough Road appropriately performs the role of a district centre.

Table 5.12: Narborough Road District Centre Diversity of Use for Commercial Units

Narborough Road Units	Total Units	Percentage	National Average
Convenience	39	12.5%	8.4%
Comparison	69	22.1%	32.5%
Retail Service	54	17.3%	14.1%
Leisure Services	94	30.1%	22.4%
Financial & Business Services	33	10.6%	10.9%
Vacant	23	7.4%	11.4%
Total	**312**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Table 5.13: Narborough Road District Centre Diversity of Use for Floorspace

Narborough Road Floorspace	Total Floorspace (sq.m)	Percentage	National Average
Convenience	9,038	26.0%	15.0%
Comparison	7,233	20.8%	36.2%
Retail Service	3,611	10.4%	7.4%
Leisure Services	9,270	26.7%	23.2%
Financial & Business Services	3,643	10.5%	8.2%
Vacant	1,983	5.7%	9.3%
Total	**34,778**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Uppingham Road East District Centre

5.167 Uppingham Road East district centre is located approximately 2 kilometres to the east of Leicester city centre. As one of the largest centres in the study area, Uppingham Road provides a wide range of services and facilities that meets the day to day needs of the local community. This is reflected in the below Tables 5.14, which indicate very low vacancy rates, a below average incidence of comparison goods retailers, but an above national average level of convenience goods retailers and retail, leisure and financial services.

5.168 Whilst the range of facilities – including a number of key community services, such as high street banks and medical centres – means that the centre performs an important day-to-day role, Uppingham Road East's evening economy is somewhat limited. The shops are generally small in size and comprise mostly independent businesses. However, there are a number of national retailers, many of which are located in larger units, towards the east of the centre. In addition, the district centre as a whole has few vacant units and the eastern part benefits from a bustling atmosphere, which indicates a relatively healthy state.

5.169 The centre suffers from being somewhat disjointed, with a multitude of road junctions and side streets along its length, as well as large stretches of non-retail or service uses. As a result, the shopping area is split in two and there is a clear division of approximately 400 metres between the two parts of the shopping area. The division is further pronounced by the differing characters of the two parts of the centre, as the area to the east contains the vast majority of the national retailers and is a particular focus of activity. A less comprehensive offering is provided within the western half, where the environment is of poorer quality and there are fewer parking opportunities. As a result, the centre arguably does not function as a single entity and it is recommended that consideration is instead given to disaggregating the two eastern and western parts and re-allocating these as two separate local centres.

Table 5.14: Uppingham Road East District Centre Diversity of Use for Commercial Units

Uppingham Road East Units	Total Units	Percentage	National Average
Convenience	11	13.1%	8.4%
Comparison	24	28.6%	32.5%
Retail Service	14	16.7%	14.1%
Leisure Services	24	28.6%	22.4%
Financial & Business Services	10	11.9%	10.9%
Vacant	1	1.2%	11.4%
Total	**84**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Table 5.15: Uppingham Road East Centre Diversity of Use for Floorspace

Uppingham Road East Floorspace	Total Floorspace (sq.m)	Percentage	National Average
Convenience	2,774	18.8%	15.0%
Comparison	3,138	21.3%	36.2%
Retail Service	2,445	16.6%	7.4%
Leisure Services	4,444	30.1%	23.2%
Financial & Business Services	1,821	12.4%	8.2%
Vacant	120	0.8%	9.3%
Total	**14,742**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Blaby Town Centre

5.170 Blaby town centre is located approximately 8 kilometres to the south of Leicester city centre and approximately 3.5 kilometres south-west of Fosse Park Shopping Park. The centre serves the surrounding communities as a main food shopping destination and has a particularly strong convenience, leisure service, retail service and financial and business service offer. However, as set out below in Tables 5.16 and 5.17, the comparison goods offer is somewhat limited for a town centre.

5.171 Blaby's centre functions extremely well and benefits from good all-round accessibility. Although much of the high street comprises low quality 1960s style retail units, many environmental improvements have been made, which make the shopping area appealing. There are issues with potential for improvement, including lower levels of pedestrian activity on Lutterworth Road to the north of the crossroads, as well as the visual appearance of the rear of the buildings facing the St Johns Court and Enderby Road car parks. In addition, the appearance of the frontages of some of the retail units would also benefit from improvement.

5.172 Notwithstanding this, Blaby town centre is generally very well maintained and is of a good environmental quality, which also aids a perception of the centre feeling very safe and secure. Overall, the town centre appears to be in good health, which is exemplified by the extremely low number of vacant units, the high number of national operators and the wide diversity of services and facilities on offer.

5.173 Blaby performs an important role and function and we consider that it is appropriately designated as a town centre. However, the defined centre boundary incorporates several areas of residential and industrial uses, which are not normally associated with a commercial centre. As such, we believe that there is scope for the boundary to be rationalised to exclude these areas.

Table 5.16: Blaby Town Centre Diversity of Use for Commercial Units

Blaby Town Centre Units	Total Units	Percentage	National Average
Convenience	11	12.0%	8.4%
Comparison	23	25.0%	32.5%
Retail Service	22	23.9%	14.1%
Leisure Services	15	16.3%	22.4%
Financial & Business Services	19	20.7%	10.9%
Vacant	2	2.2%	11.4%
Total	**92**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Table 5.17: Blaby Town Centre Diversity of Use for Floorspace

Blaby Town Centre Floorspace	Total Floorspace (sq.m)	Percentage	National Average
Convenience	3,140	28.3%	15.0%
Comparison	2,780	25.0%	36.2%
Retail Service	1,920	17.3%	7.4%
Leisure Services	1,680	15.1%	23.2%
Financial & Business Services	1,510	13.6%	8.2%
Vacant	80	0.7%	9.3%
Total	**11,110**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Enderby District Centre

5.174 Enderby district centre is located approximately 7.5 kilometres to the south-west of Leicester city centre and 3 kilometres to the west of Fosse Park Shopping Park. The centre is focussed around the central thoroughfare of Cross Street, Mill Lane and Corporation Street. The surrounding land uses mainly comprise residential areas, although a school, library and a community centre are all located close to the centre.

5.175 Enderby has a wide range of services and facilities for a settlement of its size. As indicated by Tables 5.18 and 5.19, Enderby has a generally strong all-round retail offer (though a relative under-provision of comparison goods retail when compared with national average level) and accommodates a good range of services and facilities. These mainly cater for a relatively localised catchment, but also help meet the needs of surrounding village communities. Demand for units is clearly strong given the complete lack of vacancies.

5.176 The centre is generally in good health. Pedestrian activity throughout the centre appeared to be relatively high and the shops have good all-round accessibility. The environmental quality and sense of safety and security are also good, although there are some areas that would benefit from environmental improvements.

5.177 The range of Enderby's retail offer supports linked shopping trips within the centre. Given the number of units and variety services on facilities on offer, which include a number of community uses, we consider that Enderby appropriately performs the role of a district centre. We recommend that Enderby's boundary could be extended slightly to incorporate the library.

Table 5.18: Enderby District Centre Diversity of Use for Commercial Units

Belgrave Road Units	Total Units	Percentage	National Average
Convenience	3	11.5%	8.4%
Comparison	3	11.5%	32.5%
Retail Service	8	30.8%	14.1%
Leisure Services	9	34.6%	22.4%
Financial & Business Services	3	11.5%	10.9%
Vacant	0	0.0%	11.4%
Total	**26**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Table 5.19: Enderby District Centre Diversity of Use for Floorspace

Belgrave Road Floorspace	Total Floorspace (sq.m)	Percentage	National Average
Convenience	711	23.8%	15.0%
Comparison	759	25.4%	36.2%
Retail Service	490	16.4%	7.4%
Leisure Services	823	27.5%	23.2%
Financial & Business Services	205	6.9%	8.2%
Vacant	0	0.0%	9.3%
Total	**2,988**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Glenfield District Centre

5.178 Glenfield district centre takes the form of a village centre located approximately 5.5 kilometres to the west of Leicester city centre and approximately 2 kilometres driving distance from the M1 motorway. Glenfield's shops are spread over a 400 metre area with sporadic housing accommodated between sections of retail units. The centre is anchored by a large Co-operative Food store, which accommodates many additional community facilities.

5.179 Although pedestrian flows within Glenfield appeared to be low at the time of our visit, the centre appears to be performing reasonably well and has no vacant retail units. The shopping area is also generally accessible and there is a perception of safety. However, there are many areas where improvements could be made, most notably with regard to the environmental quality and public transport accessibility.

5.180 Glenfield's centre has a range of retail and service uses, which evidently play an important role in catering for the day to day shopping needs of the local community and people living further afield. It is therefore considered that Glenfield appropriately functions as a district centre. We do however recommend that Glenfield's boundary could be extended slightly to incorporate the library.

5.181 The level of service provision within the wider Glenfield area is set to grow considerably as planning permission has been granted for the creation of a new local centre to the east of the existing retail area (planning application reference 10/0118/1/OX). This planning permission provides for up to 1,400 square metres of retail space to meet local needs. The 250 new dwellings and 30 hectares of employment land would also greatly increase the demand for services in the local area, although the new retail units will also provide a level of competition to the existing facilities within the district centre.

Table 5.20: Glenfield District Centre Diversity of Use for Commercial Units

Glenfield Units	Total Units	Percentage	National Average
Convenience	2	10.0%	8.4%
Comparison	2	10.0%	32.5%
Retail Service	7	35.0%	14.1%
Leisure Services	7	35.0%	22.4%
Financial & Business Services	2	10.0%	10.9%
Vacant	0	0.0%	11.4%
Total	**20**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Table 5.21: Glenfield District Centre Diversity of Use for Floorspace

Glenfield Floorspace	Total Floorspace (sq.m)	Percentage	National Average
Convenience	5,297	61.3%	15.0%
Comparison	293	3.4%	36.2%
Retail Service	839	9.7%	7.4%
Leisure Services	2,008	23.2%	23.2%
Financial & Business Services	203	2.3%	8.2%
Vacant	0	0.0%	9.3%
Total	**8,640**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Narborough District Centre

5.182 Narborough accommodates 22 units within the commercial centre boundary (the 21 units identified below and the library) and incorporates a particularly strong service offer, demonstrating Narborough's importance in meeting local needs. As demonstrated below by Tables 5.22 and 5.23, the centre also has reasonable convenience and comparison retail representation.

5.183 The defined centre boundary is split into two areas. However, there are 11 further retail units between the two parts of the defined centre boundary that also make a contribution to meeting the needs of Narborough's catchment. Amongst other facilities, the centre itself accommodates a Post Office, pharmacy, bank, several convenience stores and a library.

5.184 The centre appears to be in extremely good health and pedestrian flows are generally high throughout the shopping area. There are two vacant retail units, which are on the eastern extremity of the commercial area. In addition, the centre has good sense of safety and security and its environmental quality is generally good. Moreover, Narborough has very good accessibility from all modes of transport and is one of the few centres within the study area to have good access to the railway network.

5.185 In summary, Narborough's shops and services offer a wide range of services and facilities and there are also a number of additional community facilities, which serve the local area and the wider villages and communities. We therefore consider that the centre appropriately performs the role of a district centre.

Table 5.22: Narborough District Centre Diversity of Use for Commercial Units

Belgrave Road Units	Total Units	Percentage	National Average
Convenience	3	14.3%	8.4%
Comparison	4	19.0%	32.5%
Retail Service	5	23.8%	14.1%
Leisure Services	3	14.3%	22.4%
Financial & Business Services	4	19.0%	10.9%
Vacant	2	9.5%	11.4%
Total	**21**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Table 5.23: Narborough District Centre Diversity of Use for Floorspace

Belgrave Road Floorspace	Total Units	Percentage	National Average
Convenience	409	18.6%	15.0%
Comparison	209	9.5%	36.2%
Retail Service	347	15.8%	7.4%
Leisure Services	854	38.8%	23.2%
Financial & Business Services	239	10.9%	8.2%
Vacant	143	6.5%	9.3%
Total	**2,201**	**100.0%**	**100.0%**

Source: Experian Goad plan as updated by WYG site visit in November 2014, national average figures from Experian Goad Category Report (November 2014)
Note: Figures comprise units within current centre boundary only

Local Centres

5.186 At present, there are 67 local centres in the Leicester administrative area and we have reassessed 25 retail areas that were formerly designated as local centres in the City of Leicester Local Plan (1994). In addition, the Blaby administrative area contains a further eight local centres and the District also contains two further shopping areas that are respectively defined as a Rural Centre and an out of centre Motorway Retailing Area.

5.187 A detailed assessment of each centre is again provided at Appendices 3 and 4. The following section provides a very brief summary of each centre and identifies those where we recommend a revision to the defined centre boundary or changes in respect of its designation.

Leicester: Abbey Lane

5.188 Abbey Lane was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006). The former local centre boundary is split into three parts and currently contains 11 retail units. There are some additional main town centre uses adjacent to the former boundary, which could be included within it, although there are also a number of non-retail uses that are located between the retail areas.

5.189 Given the number of units in this location and the level of day to day goods and services on offer, we consider Abbey Lane to function as a neighbourhood parade and we recommend that it is re-designated accordingly.

Leicester: Aikman Avenue

5.190 Aikman Avenue contains 11 retail units with a range of goods and services on offer. In addition, there are several buildings on the edge of the defined centre boundary that play an active role in the overall function of the centre, including a library and a Leicester City Council operated community building. The centre appears in good health, with no vacant units and with good levels of footfall throughout. Given the range of services on offer within and in proximity to the centre, it is considered that Aikman Avenue currently performs the role of a local centre.

Leicester: Allandale Road/Francis Street

5.191 Allandale Road/Francis Street local centre is formed almost exclusively of small independent shops and has a significant comparison goods offer. The centre also accommodates several community services and facilities, although there is an issue with high vacancy rates, which may be caused, at least in part, by parking limitations, poor public transport connections and low levels of footfall. Notwithstanding this, we consider that the centre continues to perform the role of a local centre.

5.192 There are also a number of additional units adjacent to south-west of the local centre boundary, which actively contribute to the centre's offer. We recommend that the boundary should be extended to incorporate these units.

Leicester: Ambassador Road

5.193 Ambassador Road was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006).

5.194 We do not consider the three retail units at Ambassador Road to provide sufficient services or facilities to be considered as a neighbourhood parade. Notwithstanding this, the retail units and the surrounding area appear to be in reasonably good health and function well in providing for the day-to-day top up shopping needs of the local community.

Leicester: Asquith Boulevard

5.195 Asquith Boulevard local centre is split on either side of Asquith Way and comprises a total of 14 commercial units. The centre has a strong convenience and leisure service offer and a number of other key local services and facilities exist within the shopping area. The centre appears to be in good health and has no vacant units. It benefits from a good environmental quality and the centre generally feels safe and secure. The shops are accessible, although parking availability appears to be an issue from Asquith Way. Notwithstanding this, the centre currently appropriately performs the role of a local centre.

5.196 A Tesco Express is located on the north-eastern edge of the defined centre boundary, which functions as part of the main commercial area. We therefore recommend that the centre's boundary is extended to include this unit.

Leicester: Aylestone Road/Cavendish Road

5.197 Aylestone Road/Cavendish Road's local centre comprises 24 retail units, which are split across two areas. The centre has a strong convenience and leisure service offer, which caters for the day to day needs of the surrounding residential and business communities. There is a particular specialism in vehicle related retail, although there are also a high number of hot food takeaways within the centre. The centre appears to suffer from low pedestrian activity and there is an issue with a lack of parking availability in front of the shops. Aylestone Road/Cavendish Road also does not necessarily feel the most safe and secure of centres and its environmental quality would benefit from improvement. Notwithstanding this, the centre offers a number of services and facilities that are consistent with the role of a local centre.

5.198 There is a dentist's surgery directly adjacent to the northern boundary of the southern section of the centre, which actively contributes to the centre's offer. Accordingly, we recommend that the boundary should be extended to include this unit.

Leicester: Aylestone Road/Hazel Street

5.199 This centre comprises a small parade of seven retail units, which are located adjacent to a dense residential area and in proximity to Leicester Tigers rugby union club and to Leicester College. However, pedestrian activity around these units is generally quite low. The centre has environmental quality issues, as well as issues with safety and security. There is also limited parking availability around the shops.

5.200 Whilst the units do help serve the needs of the surrounding community, we do not consider that the number and range of units is akin to that which would ordinarily be found within a local centre and therefore recommend that the centre should be re-designated as a neighbourhood parade.

Leicester: Aylestone Village

5.201 Aylestone Village has a strong convenience, retail service and leisure service representation and the shops currently function well as a local centre. The centre benefits from a reasonably good environmental quality and the centre generally feels secure. In addition, the centre is generally accessible and pedestrian flows appear healthy. There are several retail units beyond the south-western edge of the defined centre boundary, including a Tesco Express, social club and two car sales. We consider that the Tesco Express and social club are main town centre uses which contribute to the overall function of the centre and, accordingly, recommend that the local centre boundary should be extended to include them.

Leicester: Aylmer Road

5.202 Aylmer Road is a very small parade comprising four retail units. However, the units play an important role in serving the surrounding community's top up shopping needs, as well as containing a Post Office and a hot food takeaway. The centre is generally in reasonable health, is accessible to the local population and is of a good environmental quality. However, we do not consider the centre's offer to be consistent with the level of provision that would normally be found within a local centre and therefore recommend that it is re-designated as a neighbourhood parade.

Leicester: Barley Croft

5.203 Barley Croft local centre appears to be in relatively fragile health. Although there are no vacant units, there are concerns relating to the centre's environmental quality, which impacts greatly on the area's sense of safety and security. The levels of pedestrian activity also appear to be low.

5.204 Notwithstanding the above, the centre still currently provides several key services and the pub, community centre and youth centre provide additional services on the edge of the centre, which we recommend are included within its boundary. However, given the limited number of units, we do not consider that Barley Croft appropriately performs the role of a local centre and that it should be it is re-designated as a neighbourhood parade.

Leicester: Bateman Road

5.205 Bateman Road was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006).

5.206 The former local centre previously contained eight retail units, which were located in pairs on each corner of the junction of Bloxham Road and Bateman Road. However, seven of the units have since been converted to residential uses. Accordingly, we do not consider the single remaining retail unit to have the diversity of uses that would be expected of a neighbourhood parade.

Leicester: Beaumont Lodge

5.207 Beaumont Lodge is a small centre of seven units which help to meet the needs of the local community. The medical centre and community centre, which sit on the edge of Beaumont Lodge's commercial boundary, are also considered to contribute the overall offer within the centre. Consequently, we recommend that the boundary is extended to incorporate these uses. However, the number of units and the range of goods and services on offer are not considered to fulfil the definition of a local centre in practice and we recommend that the centre is re-designated as a neighbourhood parade.

Leicester: Bede Park

5.208 Bede Park is a modern retail parade located within an area populated mainly by students. The centre is of a good environmental quality and also feels generally secure. A large proportion of people visiting the centre do so by foot or by bike. However, there seems to be an issue with low levels of footfall and the presence of a large vacant unit may be symptomatic of this. This issue may also be exacerbated by the difficulty in parking close to the shops.

5.209 The centre is significantly more attractive when considered in combination with the nearby Tesco Express and four neighbouring retail units that front onto Western Boulevard, which we consider should be included in its boundary. However, even with the incorporation of these units, we do not consider that Bede Park performs the role of a local centre and we recommend that it is re-designated as a neighbourhood parade.

Leicester: Belgrave Boulevard

5.210 Belgrave Boulevard comprises a terrace of six shops with an adjacent restaurant to the east. The shopping parade appears to be in a healthy state and currently has no vacant units and benefits from a good level of pedestrian activity. Furthermore, it provides an important facility to the local community. However, given the limited number of units, we consider that Belgrave Boulevard's centre should be re-designated as a neighbourhood parade, as it does not contain the level of services or facilities that would normally be expected in a local centre.

Leicester: Berners Street

5.211 Berners Street was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006). The former local centre boundary currently contains three retail units but there are several additional units along Melbourne Road, which collectively form a retail nucleus that functions as a small neighbourhood parade.

5.212 Overall, the parade appears to be in reasonable health, although Berners Street would benefit from interventions to increase footfall from Melbourne Road. In addition, this area would benefit from future development being more concentrated around the retail cores and not in sporadic form along Melbourne Road.

Leicester: Blackbird Road/Groby Road/Woodgate

5.213 Blackbird Road/Groby Road/Woodgate local centre has a diverse range of shops and services that provide a key facility for the neighbouring residential and employment areas. We consider that the 35 units within the existing centre boundary function as a local centre.

5.214 To the east of the centre boundary, there are a number of shops along Woodgate, including a new Aldi supermarket, which contribute significantly to the centre's overall function. These units in practice function as part of the main retail area and we therefore recommend extending the centre accordingly.

Leicester: Bonney Road

5.215 Bonney Road was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006). The former local centre boundary is split into two parts on either side of Bonney Road, which currently contain three retail units that face onto a central green within a quiet residential area.

5.216 The shops are fully occupied and the area appears to be in good general health. However, we do not consider Bonney Road to have a sufficient number of units or the range of goods and services on offer that would normally be expected within a neighbourhood parade. We therefore recommend that these shops remain undesignated.

Leicester: Bringhurst Road

5.217 Bringhurst Road was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006). The former local centre boundary contains three retail units, which front onto a green within a predominantly residential area.

5.218 Bringhurst Road's retail units are fully occupied and the area appears to be in reasonably good overall health. However, we do not consider that Bringhurst Road contains the services, facilities or the retail offer that would normally be expected within a neighbourhood parade and we recommend that the shops should remain undesignated.

Leicester: Buckminster Road/Whitwick Way

5.219 The retail area at Buckminster Road/Whitwick Way comprises three retail units, which are located at the junction of Buckminster Road and Ansty Road (B5327). The shops were formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, they are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006).

5.220 The former local centre boundary contains three retail units, which are fully occupied. In addition, the shops appear to be in reasonably good overall health with no major concerns. However, the area lacks the services, facilities and the retail offer that would normally be expected within a neighbourhood parade. We therefore recommend that the shops remain undesignated.

Leicester: Burnham Drive

5.221 Burnham Drive comprises a parade of seven units, which help meet some of the day to day needs of the local community. The shops are generally in good condition and, although pedestrian activity appeared to be low at the time of the visit, there were no vacant units. The centre is generally accessible, the area around the shops feels safe and secure, and the parade functions well overall. However, given the limited range of goods and services on offer and due to there being only seven retail units, we do not consider the centre's offer to be consistent with the level of provision that would normally be expected within a local centre and recommend that it is re-designated as a neighbourhood parade.

Leicester: Cantrell Road

5.222 Cantrell Road contains four units, which are separated by the Bruanstone Victoria Working Men's Club. The shops were formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, they are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006).

5.223 The retail units are fully occupied and the area appears to be in reasonably good overall health with no major concerns. However, we consider that Cantrell Road does not contain the day-to-day retail or service offer that would normally be expected within a neighbourhood parade. We therefore recommend that the shops remain undesignated.

Leicester: Catherine Street/Canon Street

5.224 Catherine Street/Canon Street functions principally as a location for top-up grocery shopping, but also provides a limited range of services, with the centre serving a localised catchment. The shopping area generally feels safe and secure and the shops and services are considered to appropriately perform the role of a local centre. However, it is recommended that consideration be given to extending the boundary of the centre to include a cafe and a restaurant/bar which are currently located at its edge.

Leicester: Catherine Street/Brandon Street

5.225 The shops at Catherine Street/Brandon Street were formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, they are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006).

5.226 There are 13 retail units within the former local centre boundary and we consider the number of units and the types of goods and services on offer to be similar to the level of a neighbourhood parade. We therefore consider that the former local centre boundary should be re-designated accordingly. The parade appears to be in reasonably good health and has only one vacant unit. However, some of the units would benefit from maintenance, which would improve the overall environmental quality and sense of safety and security within the area.

Leicester: Downing Drive

5.227 Downing Drive is considered to appropriately perform the role of a small local centre, serving the day to day needs of its catchment population. The centre contains 10 units that provide a healthy mix of shops and services and benefits from a small number of national retailers. The units are fully occupied and the centre's environmental quality is also good, with no issues which give cause for concern.

5.228 Given that the road to the east of the centre does not comprise a main town centre use, we consider that the boundary should be rationalised to exclude this area.

Leicester: Eastwood Road

5.229 Eastwood Road is a reasonably quiet residential street located off Soar Valley Way (A563). There are currently three retail units, which were formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006).

5.230 The shops are fully occupied and the area appears to be in reasonably good overall health with no major concerns. However, we do not consider Eastwood Road to contain the services, facilities or the retail offer that would normally be expected within a neighbourhood parade. We therefore recommend that the shops remain undesignated.

Leicester: East Park Road (North)

5.231 East Park Road contains 41 units, which provide a wide range of services and facilities. The centre appears to be generally well maintained and has a notable function as a comparison goods shopping location, specifically relating to ladies fashion alongside a typical range of services as expected within a local centre. However, congestion and parking issues are apparent, although the car park does not appear to be used to its full potential.

5.232 The centre is functioning well, which is evident from the lack of vacant units and several new businesses have recently opened. Given the range and number of units in the centre, we consider that East Park Road South appropriately performs the role of a local centre.

Leicester: East Park Road (South)

5.233 East Park Road (South) local centre comprises a row of 11 retail units, which serve the surrounding terraced housing area. The centre has a strong convenience offer and has only one vacant unit. East Park Road (South) also benefits from generally good car and pedestrian accessibility.

5.234 There are reasonable pedestrian flows across the retail frontage and the general area benefits from a good environmental quality and feeling of security. However, we do not consider the centre's offer is sufficiently extensive to be consistent with that which would ordinarily be found within a local centre. Accordingly, we recommend that East Park Road (South) centre should be re-designated as a neighbourhood parade.

Leicester: Egginton Street

5.235 Egginton Street local centre comprises 20 retail units and accommodates a particularly strong convenience offer, as well as several shops that specialise in Asian clothing. There are also five units (including a medical centre) just beyond the defined boundary, which are in sufficient proximity to support linked trips with the facilities within the defined centre. The existing retail area appears to be in robust health and pedestrian flows are generally high. The centre is also reasonably accessible and the sense of safety and security and environmental quality are both excellent. In summary, Egginton Street appropriately performs the role of a local centre.

Leicester: Evington Village

5.236 Evington Village is traditional local centre comprising 18 units, which appear to be in a healthy condition. There were no vacant units at the time of our visit and the centre has an attractive local environment. There is also a small but suitably varied shopping and service offer, as well as a number of community facilities, which cater for local needs.

5.237 A small number of established shops currently sit adjacent to the existing centre boundary. These comprise main town centre uses that would normally be expected to form part of the centre and we recommend that the centre boundary is extended to include these units. Even without these units, Evington Village appropriately performs the role of a local centre.

Leicester: The Exchange

5.238 The Exchange is in a period of transition, with the redevelopment of the existing retail parade being underway. It is evident that the former retail units performed poorly and were no longer fit for purpose. However, a new modern replacement parade of five retail units and a small supermarket has been built on the south-eastern edge of the current centre boundary. The new units are fully occupied and are a considerable improvement on the previous facilities.

5.239 One of the three storey former retail buildings within the existing commercial centre has already been demolished. The remaining building is also scheduled to be knocked down. In its place, a new terraced residential developed is to be built. A medical complex has also gained planning permission on a site within the south-eastern corner of the existing centre boundary. This will be located adjacent to the newly built retail units. The centre boundary will need to be redrawn to reflect the changes that have occurred. In its new form, we consider that The Exchange functions as a local centre.

Leicester: Fosse Road North

5.240 This centre comprises 26 units. There are also a number of additional units at the edge of the defined centre boundary. Fosse Road North accommodates a strong convenience and retail service offer, as well as a number of key community facilities. Given the size of the centre and the range of goods and services on offer, we consider that Fosse Road North appropriately performs the role of a local centre.

5.241 The centre appears to performing reasonably well and there are high levels of footfall and good accessibility. The environmental quality and sense of safety and security are also reasonably good and will likely improve further should the proposed Lidl supermarket be brought forward on the site of the former Empire pub. We recommend that the centre boundary should be redrawn to incorporate adjacent main town centre uses and the Empire pub site.

Leicester: Fosse Road South/Hinckley Road

5.242 Fosse Road South's commercial centre comprises a small parade of nine units, which provides a range of local services. However, the centre is located very close to Narborough Road District Centre, which provides strong competition. Whilst there were no vacant units in the centre at the time of our survey, the shopping area is the subject of some issues, including the general quality of the environment which also potentially impacts on perceptions of safety and footfall levels. Accessibility to the centre is somewhat impeded by the lack of car parking (and cycle parking) facilities. Although

Fosse Road South/Hinckley Road helps to meet some local needs, we do not consider that its offer is consistent with that which would ordinarily be expected within a local centre and we therefore recommend that it is re-designated as a neighbourhood parade.

Leicester: Fosse Road South/Harrow Road

5.243 Fosse Road South/Harrow Road was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006). The former centre boundary now contains four retail units, a MOT servicing garage and a car sales garage.

5.244 Given the types of goods and services on offer and the number of retail units, we consider Fosse Road South/Harrow Road to perform the role of a small neighbourhood parade. In addition, the shops are fully occupied and the area appears to be in reasonably good overall health with no major concerns.

Leicester: Fosse Road South/Upperton Road

5.245 Fosse Road South/Upperton Road was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006). The former centre boundary now contains seven retail units.

5.246 Given the types of goods and services on offer and the number of retail units, we consider Fosse Road South/Upperton Road to perform the role of a small neighbourhood parade. In addition, the shops are fully occupied and the area appears to be in reasonably good overall health with no major concerns.

Leicester: Fullhurst Avenue

5.247 This retail area comprises a parade of six shops. The parade has no vacant units, but suffers from poor environmental quality and low levels of footfall. Fullhurst Avenue feels reasonably safe and secure, and is also reasonably accessible. Fullhurst Avenue contains several key community services and there is a large medical centre adjacent to its boundary, as well as a very limited number of retail and leisure service units. Whilst we recommend that the centre boundary is extended to incorporate these units, we consider that Fullhurst Avenue is a relatively small scale facility and one which fails to provide the range of goods and services which one might expect to find within a local centre. Accordingly, we recommend that consideration is given to the re-designation of Fullhurst Avenue as a neighbourhood parade.

Leicester: Gamel Road

5.248 Gamel Road was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006).

5.249 The former centre boundary currently contains three retail units and are neighboured by a community centre. The shops are fully occupied and appear to be in good general health. However, we do not consider there to be a sufficient number of units or the range of goods and services that would normally be expected within a neighbourhood parade. We therefore recommend that these shops remain undesignated.

Leicester: Gervas Road

5.250 Gervas Road functions principally as a top-up and convenience shopping destination on a local scale, providing a very limited range of shops and services. Due to the 'back street' location and the centre's limited offer, the group of shops are not considered to function as a local centre. It is considered that the centre more accurately performs the role of a neighbourhood parade. However, we consider the pub to the south to function as part of Gervas Road in practice and therefore recommend that this unit be included within its boundary.

Leicester: Gipsy Lane

5.251 Gipsy Lane appears to be generally vibrant and benefits from a low vacancy rate, although the south-east corner of the centre appears to be performing less well with vacancies localised in this vicinity. High levels of footfall are experienced at the heart of the centre around the Lidl store, but the centre also has a community feel with a high concentration of independent traders.

5.252 Given its functionality and the range of shops and services provided, we consider Gipsy Lane to successfully perform the role of a local centre. However, we recommend that the centre boundary is revised to include the whole of the Lidl convenience store and also to exclude two houses to the east, which do not comprise main town centre uses.

Leicester: Green Lane Road/Bridge Road

5.253 Green Lane Road/Bridge Road is a large centre with a vibrant atmosphere, providing an extensive range of retail goods and services. The centre is divided into two areas and centre's boundary appears to be evolving with former residential properties now being put to commercial use. We therefore recommend that consideration is given to extending the centre's boundary to include several adjacent main town centre uses, including the Piccadilly Cinema building. Green Lane Road / Bridge Road incorporates a range of retailers and services and is considered to appropriately perform the role of a local centre.

Leicester: Green Lane Road/Coleman Road

5.254 Green Lane Road/Coleman Road was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006).

5.255 There are five shops, which front onto Green Lane Road directly to the east of its busy junction with Coleman Road (A6030). We consider these to have a sufficiently diverse offer and contain the services and facilities that might be found within a small neighbourhood parade. We therefore recommend that the shops are re-designated accordingly. In addition, the shops are fully occupied and appear to be in good general health.

Leicester: Guthridge Crescent

5.256 Guthridge Crescent is a small parade comprising six retail units. The parade is located within the heart of a residential area and is reasonably accessible. The sense of safety and security and the environmental quality are also both of a reasonable standard. However, the centre suffers from low levels of pedestrian activity and two of its units are vacant.

5.257 Given the low number of units within the retail area and the centre's limited offer, we do not consider that the centre functions at the level of a local centre. Accordingly, we therefore recommend that it is re-designated as a neighbourhood parade.

Leicester: Harrison Road

5.258 Harrison Road comprises 10 retail units that benefit from a healthy level of pedestrian activity and, perhaps as a consequence, no vacant units were recorded at the time of our survey. The environmental quality is good, with many shops retaining traditional shop fronts and architectural features.

5.259 However, given the small scale and relatively limited range of shops and services provided at Harrison Road, we believe that it more accurately function as a neighbourhood parade and should be re-designated as such. Notwithstanding this, Harrison Road's boundary omits a number of adjacent shops and we consider that its boundary should be redrawn to include these units.

Leicester: Hartington Road

5.260 This centre is located within a dense terraced residential area and comprises 24 units, which provide a strong convenience and retail service offer. Pedestrian flows are highest around the western side of the parade, but there may be an issue in this regard further to the east, where two vacant units are located. The sense of safety, the environmental quality and the centre's accessibility are generally good. Overall, the current shops appear to be performing well in serving the surrounding community and are considered to appropriately function as a local centre.

5.261 There are several retail units on the edge of the centre boundary, including a community centre, which contribute to the centre's role. Accordingly, we recommend that Hartington Road's boundary be extended to incorporate these units.

Leicester: Heyford Road

5.262 Heyford Road comprises five retail units, but appears to be in a fragile condition with one unit vacant and the remaining units in a somewhat run-down and neglected state. In our view, the design of the parade may be a contributory factor to its poor performance. Given its small scale and limited facilities, we consider that it performs the role and function of a neighbourhood parade and should be re-designated as such.

Leicester: Hinckley Road

5.263 Hinckley Road's commercial centre comprises a row of 35 units on the northern side of Hinckley Road (A47). Whilst it provides a strong convenience, retail service and leisure service offer, the centre currently accommodates a number of vacant units. Notwithstanding this, Hinckley Road local centre appears to be in reasonably good health, with fairly high levels of footfall across most of the retail frontage. The shopping area is also accessible and generally feels safe and secure.

5.264 Although the Hinckley Road dual carriageway has an impact of the centre's environmental quality, well designed street furniture, parking bays and trees have helped to mitigate its impact. Taking all of the above into consideration, we consider that Hinckley Road appropriately performs the role of a local centre.

Leicester: Home Farm/Strasbourg Drive

5.265 Home Farm/Strasbourg Drive incorporates a limited number of commercial units, but has a very strong community and service function. Accordingly, because of the importance of the health centre and advice centre – and adjacent community buildings, such as the Sure Start centre and neighbourhood centre – we consider that it currently performs the role of a local centre. We recommend that the centre's boundary be revised to incorporate the adjacent heath centre and neighbourhood centre buildings.

Leicester: Humberstone Road/Farringdon Street

5.266 Humberstone Road/Farringdon Street accommodates some convenience operators alongside a small number of more specialist retail and service providers. Its environmental quality is relatively poor, with a lack of convenient parking provision detracting from its appearance. A vehicle accessories shop is located immediately adjacent to the western boundary and makes some contribution to Humberstone Road/Farringdon Street's wider offer. Accordingly, we recommend that its boundary should be extended to incorporate this unit. However, given the limited role and function of Humberstone Road/Farringdon Street, we consider that it performs the role of a neighbourhood parade in practice and that consideration should be given to re-designating the centre accordingly.

Leicester: Humberstone Village

5.267 Humberstone Village comprises nine units across a shopping parade divided between two terraces. The commercial units are generally of poor quality with multiple vacancies and several security shutters were closed during normal operational hours at the time of our visit. Whilst Humberstone Village experiences healthy levels of pedestrian activity and benefits from passing trade, it accommodates a limited range of goods and services and is only capable of making a contribution to meeting local top-up shopping and service needs. As such, it is considered that the destination falls short of providing the level of provision expected of a local centre and we recommend that consideration is given to its re-designation as a neighbourhood parade.

Leicester: Keightley Road

5.268 Keightley Road was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006). The former centre boundary is split into two parts, which are separated by a row of 10 houses.

5.269 There were previously eight retail units but three of these have since been converted into residential dwellings. In addition, two of the retail units are vacant and the area appears to suffer from low levels of pedestrian activity. The resultant limited retail offer lacks the services or facilities that would normally be expected within a neighbourhood parade. We therefore recommend that Keightley Road should remain undesignated. However, interventions could be made to improve the visual appearance and usability of the remaining shops.

Leicester: King Richard's Road

5.270 King Richard's Road comprises 17 units in a parade format, with a number of additional units adjacent to the centre boundary, which also provide key services to the surrounding residential community. Several units sell specialist comparison goods. Although the units were fully occupied at the time of our visit, it is considered that there is room for improvement in the centre's environmental quality and the sense of security. Notwithstanding this, the centre is reasonably accessible to the surrounding area and sustains moderate levels of footfall.

5.271 We recommend that the centre boundary is extended to include the adjacent public house, furniture sales room and the small parade of four units on Glenfield Road. Given King Richard's Road's existing role and function and the opportunity to extend its boundary, we consider that it currently appropriately performs the role of a local centre.

Leicester: Lanesborough Road

5.272 Lanesborough Road comprises a small terrace of six shops, which appear to be struggling to attract activity. The centre has two vacant units and benefits from only limited pedestrian footfall. The parade is close to the Belgrave Road/Melton Road district centre, which evidently provides great competition for trade. We do not consider that the limited range of provision at Lanesborough Road is comparable with what is expected of a local centre and we therefore recommend that it is re-designated as a neighbourhood parade.

Leicester: Lockerbie Walk

5.273 Lockerbie Walk provides a limited retail offer that principally serves local residents. The centre is supported by key community uses in the form of the library and Rushey Mead Health Centre (the latter facility being located just outside the existing boundary). Despite the relatively tired appearance of its built environment, the centre has a full occupancy rate suggesting that it trades relatively well. We recommend that the centre's boundary is extended to incorporate the health centre, which provides an important contribution towards the centre's role. Given the centre's functionality and role within the local community, it is considered that Lockerbie Walk appropriately performs the role of a local centre.

Leicester: London Road

5.274 London Road's commercial centre comprises a very large linear centre located along a 600 metre stretch of an arterial route into Leicester city centre. The centre is less than 200 metres from Leicester's main commercial centre. Leicester railway station is also located directly to the north-west. The centre has a strong financial and business service and leisure service representation and also accommodates food and drink uses, accountants, solicitors and estate agents. However, the centre also accommodates a number of key community facilities.

5.275 Pedestrian flows within the centre are extremely high. Whilst access to the centre by public transport is very good, cycling facilities could be improved and vehicular access is constrained. The centre also benefits from a good sense of safety and, other than the busy main road that passes through the shopping area, it is of a relatively good environmental quality.

5.276 Collectively, there are a large number of commercial units along London Road offering a wide variety of services and facilities. Accordingly, we consider that London Road appropriately performs the role of a large and vibrant local centre.

5.277 There are also a number of commercial units which lie just beyond the edge of the existing centre boundary that function as part of the centre in practice. Accordingly, we recommend that the centre boundary is extended to incorporate these units.

Leicester: Loughborough Road

5.278 Loughborough Road provides a varied range of goods and services, and is considered to appropriately function as a local centre. However, demand for the smaller and older commercial units within the centre appears to be limited, with a high vacancy rate and a considerable number of poor quality units that are in need of refurbishment. The centre lacks some of the typical local services that are often found in small to medium sized centres, such as a post office or supermarket. However, Loughborough Road contains a number of more specialised business, such as furniture sales and car parts shops.

5.279 We have again identified several units adjacent to the existing boundary of this centre that actively contribute to its offer and, accordingly, we recommend that the centre boundary is extended to include these units.

Leicester: Malabar Road

5.280 Malabar Road contains a number of shops and services that cater for the day to day needs of the local community. The centre also provides a significant concentration of community facilities, including a library and leisure centre, Post Office and a housing advice office. In addition, a number of shops are located directly adjacent to the current defined centre boundary, but make an important contribution to the centre's offer. These units function as main town centre uses in practice and consideration could be given to extending the centre's boundary to include these units in the future.

5.281 The quality of buildings in and around the commercial centre is fairly poor, which negatively impacts on the shopping area's sense of safety. At the time of our survey, there were also three vacant units in close proximity to one another to the east of the shopping area. However, it is evident that the centre benefits from healthy pedestrian flows and that it appropriately performs the role of a local centre.

Leicester: Marwood Road

5.282 Facilities within the current Marwood Road boundary provide a very limited range of goods and services (there are just four units accommodated within the current centre boundary). However, a youth centre and library are located directly to the west of the centre and a convenience store, Post Office and social club are directly to the east. Accordingly, we recommend that the boundary of the centre is amended to include these facilities and believe that this wider area appropriately performs the function of a local centre (albeit it is a local centre of a relatively small scale).

5.283 The centre appears to be performing adequately given the limited level of activity and the relatively poor condition of the physical environment (which, in turn, is considered to impact on the sense of safety and security in the centre).

Leicester: Meadvale Road

5.284 Meadvale Road was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006). The shops are located in an area to the south of Leicester city centre, which currently has a gap in the provision of defined retail centres.

5.285 The former local centre boundary currently contains five retail units and a small office. Overall, Meadvale Road appears to be in generally good health, although the shop forecourt would benefit from the introduction of some greenery and cycle hoops. Notwithstanding this, the five retail units collectively provide the range of goods and services that may be expected within a small neighbourhood parade. We therefore recommend that the former local centre boundary is re-designated accordingly.

Leicester: Melbourne Road

5.286 Melbourne Road's commercial centre comprises eight retail units of varying size, offering a range of services and facilities to the local community. A large medical centre and a library are also located within the same complex as the shops. These uses would usually be expected to form part of the centre and we therefore recommend that Melbourne Road's boundary is extended to include them.

5.287 Overall, Melbourne Road's commercial centre is in good health. There were no vacant units at the time of our visit and the centre benefits from a reasonably good level of pedestrian activity. The centre is generally accessible to the surrounding community and generally feels safe and secure.

5.288 Whilst the existing centre is relatively small, the recommended extension to the centre's boundary allows for the incorporation of the library and medical centre. As a consequence, we consider that facilities within this widened boundary appropriately perform the role of a local centre (albeit one that is again at the smaller end of the scale).

Leicester: Nedham Street

5.289 Nedham Street local centre is formed around a five way junction within a dense terraced residential area. The centre currently comprises 14 small format and independent retail units that have a strong convenience, comparison and leisure service offer. There is also a chemist, hardware store and doctor's surgery at the edge of the centre, and we recommend that the Nedham Street boundary is amended to incorporate the doctor's surgery as it is directly adjacent to the centre's boundary.

5.290 Nedham Street is generally accessible to the surrounding community and pedestrian activity appears relatively healthy. In addition, the centre generally feels safe and secure. A combination of good quality buildings, trees and street art help to provide good environmental quality. Given the size of the centre and the types of occupier and products being sold, we consider that Nedham Street appropriately performs the role of a local centre.

Leicester: Netherhall Road

5.291 This centre caters for local convenience and service needs, and also provides a number of community and health related uses. Whilst the environmental quality of the centre would benefit from improvement, activity and footfall along the shopping frontage is relatively strong. In our view, there is a scope to include the medical centre to the west within the centre's boundary, as this lies directly adjacent and is capable of supporting linked trips to the commercial units to the east..

5.292 There are no similar top-up shopping or service destinations within a short walking distance of Netherhall Road. The closest is Hamilton District Centre which is almost a kilometre away and which provides a very different offer. As such, Netherhall Road provides an important facility for local residents and is considered to appropriately perform the role of a local centre.

Leicester: Nicklaus Road

5.293 Nicklaus Road has a very limited offer, which predominantly serves very localised convenience needs. It comprises just four units and, given its very small format and limited range of goods and services, we do not consider that it performs at the expected level of a local centre. Accordingly, we recommend that Nicklaus Road is re-designated as a neighbourhood parade.

Leicester: Norwich Road

5.294 Norwich Road's centre comprises a terrace of five retail units, one of which was vacant at the time of our survey. The centre is not in a visibly prominent location and therefore does not appear to benefit from a substantial level of passing trade. The centre boundary currently includes a number of residential garages units to the north, which do not comprise town centre uses. We therefore recommend that the centre boundary is rationalised to exclude these uses. Given the very limited range of shops and services within the centre, we are also of the view that Norwich Road does not perform the role of a local centre and that it should be re-designated as a neighbourhood parade.

Leicester: Parkstone Road/Cardinals Walk

5.295 Parkstone Road/Cardinals Walk was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006).

5.296 The former local centre boundary currently contains seven retail units, which are positioned in pairs on the corners of the crossroad between Cardinals Walk and Parkstone Road. Given the types of goods and services on offer and the number of retail units, we consider Parkstone Road/Cardinals Walk to perform the role of a neighbourhood parade. In addition, the units are fully occupied and the area appears to be in reasonably good overall health with no major concerns.

Leicester: The Parkway

5.297 The Parkway was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006).

5.298 The former local centre boundary contains four retail units, which are interspersed with residential dwellings. However, the retail units are too dispersed to be considered as a neighbourhood parade. Notwithstanding this, a limited range of day-to-day goods and services are on offer that are of importance to the local community. In addition, the area appears to be in reasonably good health and the units are fully occupied.

Leicester: Petworth Drive

5.299 Petworth Drive was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006).

5.300 Petworth Drive only as two retail units, which perform an important local service. In addition, the shops appear to be in reasonably good health and there are no major issues of concern. However, we do not consider the current day to day goods or service offer at Petworth Drive to match the level of provision that would normally be expected within a neighbourhood parade. We therefore recommend that the shops remain undesignated.

Leicester: Queen's Road

5.301 Queen's Road local centre has an excellent range of shops and a particularly strong convenience and leisure service offer. The level of vacancy is also below the national average. The centre benefits from good overall accessibility, although parking availability appears to be a major constraint. Whilst the centre's environmental quality is good and it feels generally secure, the environment of the southern part of the centre could be improved considerably.

5.302 Queen's Road lacks the community facilities that are usually found within a district centre and we consider that it currently appropriately functions as a large local centre. There are also some additional uses on Clarendon Park Road and Montague Road that we consider function as part of the centre in practice. Accordingly, we recommend that the centre boundary is extended to incorporate these units.

Leicester: Raven Road

5.303 Raven Road was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006). The former local centre boundary contains four retail units, which are located within a quiet residential area predominantly comprising semi detached housing.

5.304 Given the types of goods and services on offer and the number of retail units, we consider that Raven Road performs the role of a small neighbourhood parade. In addition, the units are fully occupied and the area appears to be in reasonably good overall health with no major concerns.

Leicester: Redmarle Road

5.305 Redmarle Road was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006).

5.306 The former local centre boundary contains three retail units, although the area seems to be struggling and has a high vacancy rate. Consequently, Redmarle Road lacks the retail offer or the number of units that would normally be expected within a neighbourhood parade. We therefore recommend that the shops remain undesignated. Notwithstanding this, the general convenience store provides an important local facility, although this location suffers from low pedestrian activity and some environmental issues.

Leicester: Rowlatts Hill Road (Radstone Walk)

5.307 Rowlatts Hill Road (Radstone Walk) was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006). The former local centre boundary contains four retail units.

5.308 The dated design of the retail units does not meet modern requirements and there are issues with the sense of safety and security, low levels of pedestrian activity and the environmental quality in this location. In addition, the area struggles with a high vacancy rate, as three of the units are empty. Consequently, we consider that the retail offer at Rowlatts Hill Road (Radstone Walk) does not match the level of provision that would normally be expected within a neighbourhood parade and we recommend that the shops should remain undesignated.

Leicester: Ryder Road

5.309 Ryder Road comprises a small parade of four units. The shops serve the residential area to the north and the employment estate to the south. The environmental quality is generally good and the units have a modern and well maintained frontage. In addition, pedestrian activity appears to be generally at a high level. However, although the centre has a good car and public transport accessibility, it is not particularly well integrated with the surrounding areas. Given the limited scale of the facilities at Ryder Road, we consider it functions as a neighbourhood parade rather than as a local centre and recommend that it is re-designated accordingly.

Leicester: Saffron Lane/Burnaston Road

5.310 Saffron Lane/Burnaston Road comprises 16 small format units and a small supermarket. There are a variety of convenience, comparison, retail service and leisure service shops, which collectively function as a local centre. The centre appears to be in reasonably good health and is generally accessible. There were no vacant units at the time of our survey. Notwithstanding this, it is considered that environmental improvements could be made to the centre which would, in turn, help improve the sense of safety within the shopping area.

5.311 The defined centre boundary currently excludes a dentist's surgery to the south and we recommend that consideration is given to including this use which may help support some linked trips with the existing centre.

Leicester: Saffron Lane/Cavendish Road

5.312 Saffron Lane/Cavendish Road local centre has a strong convenience and leisure service offer, and also accommodates several specialist comparison retailers. The centre has good accessibility and pedestrian activity seems to be high. There is only one vacant unit and the shopping area feels safe and secure. Aylestone Leisure Centre and Library are located just to the south-east of the existing centre boundary. There are also several additional shops to the north that relate very closely to the main shopping area but are not currently included within the centre boundary.

5.313 Given that these units comprise main town centres uses and are in close proximity to the existing centre boundary, we recommend that the boundary is appropriately extended to incorporate them. Saffron Lane/Cavendish Road provides a number of goods and services, and has a wider community function, and we consider that it appropriately performs the role of a local centre.

Leicester: Saffron Lane/Duncan Road

5.314 This centre caters for the day to day needs of local residents and the surrounding business community. The centre has a wide range of services and facilities and a particularly strong convenience offer. In addition, at the time of our survey, there was only a single vacant unit in the centre.

5.315 The centre is also accessible to the surrounding population and benefits from a reasonable level of pedestrian activity. Despite this, the centre's environmental quality and the sense of safety within the shopping area could be improved. However, given the number of shops and the diversity of the goods and services on offer, we consider that Saffron Lane/Duncan Road appropriately performs the role of a local centre.

5.316 A working men's club and other commercial uses are located directly to the north of the existing centre boundary and we recommend that it be extended to incorporate these units.

Leicester: Saint Saviours Road East

5.317 Saint Saviours Road East has very a limited retail and service offer, principally providing a location for local top-up shopping needs. The terrace of shop units is generally in good condition, with no environmental issues or obvious safety concerns being apparent. There were also no vacant units at Saint Saviours Road East at the time of our visit and the commercial units generally appeared to be performing well. However, the centre is very small in scale and does not provide the number or range of amenities that would ordinarily be expected of a local centre. We therefore recommend that it is re-designated as a neighbourhood parade.

Leicester: Saint Saviours Road West

5.318 This centre appears to be in a healthy state and provides an important focus for the local community as a location for employment, business and community activities, as well as providing for day to day shopping needs. The shops are mostly in close proximity to each other. Limited parking opportunities remain a challenge for the centre and, as a consequence, congestion is apparent at peak times. Important additional facilities are located to the north and to the west of the current boundary (including convenience retailers and a community centre) and we recommend that the centre's boundary is extended to include some of these uses. Given the range of shops and services Saint Saviours Road West provides, we consider that it appropriately fulfils the role of a local centre.

Leicester: Saint Stephen's Road

5.319 This centre comprises 22 retail units that are split into two areas. The centre appears to be performing well and has no vacant units. Saint Stephen's Road is of a good environmental quality and is reasonably accessible. It also feels safe and secure. Despite being located only 100 metres walking distance from Evington Road district centre, the pedestrian activity around Saint Stephen's Road also appears to be reasonably high.

5.320 The centre has a particularly strong convenience offer, although there are also a number of comparison good shops, as well as retail services, leisure services and financial and business services. There are also 24 additional units on the edge of the Saint Stephen's Road local centre boundary, including many types of operator that are not found within the centre itself. These additional units are directly adjacent to the existing local centre boundary and we recommend that the boundary be extended to include such uses. As a consequence, the distance between the two component parts of the centre is shortened, reflecting that the two elements of the centre are able to function as a single destination in practice. We consider Saint Stephen's Road to appropriately perform the role of a local centre.

Leicester: Sandshill Avenue

5.321 Sandshill Avenue is a modern centre of a modest scale and functions primarily a top-up shopping location. The centre is a new facility and provides a good mix of key shops and retail services, which are well suited to meeting the needs of local residents. The centre is considered to be highly accessible to the neighbouring population. Only one unit was found to be vacant at the time of our survey. Whilst Sandshill Avenue is of a limited scale, it incorporates a Sainsbury's Local convenience store, a pharmacy and an optician, and it is considered that the centre has a sufficient range of provision to appropriately fulfil the role of a small local centre.

Leicester: Sharmon Crescent

5.322 Sharmon Crescent is formed by a parade of four units, which is comprised of two convenience stores, a pub and a Council recreational centre. The area in front of the shops has been the subject of some public realm improvement works and is well maintained. However, whilst all the units are occupied, there was little pedestrian activity in the area at the time of our visit. Furthermore, the area between the shops and The Shoemakers pub to the rear to the rear is not particular attractive and does not engender a feeling of security.

5.323 Given the very limited number of shops, we consider that Sharmon Crescent currently performs the role of a neighbourhood parade and we recommend that it is re-designated accordingly.

Leicester: Southfields Drive

5.324 Southfields Drive is a small parade of eight retail units with a strong convenience and leisure service offer. There are several key community services close by, including a school. Southfields Drive benefits from good pedestrian and public transport accessibility, although vehicular access to the shops is problematic. Southfields Drive is of a reasonable environmental quality, feels generally safe and secure, and, during our visit, appeared to be well used.

5.325 Whilst we recommend that Southfields Drive's boundary is extended to the east to incorporate three additional units (comprising a convenience store, hairdresser and business service use), it is of a small scale and provides a relatively limited range of facilities. Accordingly, we do not consider that Southfields Drive performs the role of a local centre and recommend that it is re-designated as a neighbourhood parade.

Leicester: Sparkenhoe Street

5.326 Sparkenhoe Street contains a number of convenience stores that serve the surrounding community. The centre also has several larger specialist comparison retailers that attract customers from further afield. There are also a number of community services and facilities on the edge of the defined centre, which complement its offer.

5.327 The centre has reasonable levels of pedestrian activity and a sense of vibrancy and community cohesion. The environmental quality and sense of safety and security within the shopping area are also generally good. Whilst we consider that the mix of uses at Sparkenhoe Street is somewhat atypical, we consider that it currently performs the role of a small local centre.

Leicester: Swinford Avenue

5.328 Swinford Avenue's comprises a parade of eight retail units, which are split across two areas. The western part of the centre is formed of a row of six single storey purpose built retail units. The eastern part comprises a Co-operative Food supermarket and a pub. The centre has a particularly strong convenience and leisure service offer. The centre appears highly accessible to the neighbouring community and benefitted from significant pedestrian activity at the time of our visit. However, the western part precinct is of dated appearance.

5.329 Given that Swinford Avenue contains a supermarket and a number of additional community services and facilities, it is considered that the centre appropriately performs the role of a small local centre.

Leicester: Thurncourt Road

5.330 The centre comprises 13 shops which primarily serve local shopping needs. The centre’s physical environment has recently been upgraded and provides an attractive setting. The centre is considered to be in good health which is exemplified by there being no vacant units and two previously vacant units have recently been returned to active use.

5.331 The centre is adjacent to a number of community uses to the west and we recommend the boundary is extended to include these uses. We consider that Thurncourt Road appropriately performs the role of a small local centre.

Leicester: Upperton Road/Wilberforce Road

5.332 Upperton Road/Wilberforce Road was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006). The former local centre boundary contains six retail units, which are located at the crossroads between Upperton Road and Wilberforce Road.

5.333 Upperton Road/Wilberforce Road has a bustling environment, high levels of pedestrian activity and is in reasonably good overall health. In addition, we consider the range of day-to-day goods and services on offer to be consistent with the level that would normally be expected within a small neighbourhood parade. We therefore recommend that the units are re-designated accordingly.

Leicester: Victoria Road East

5.334 Victoria Road East comprises 21 units, including two small convenience stores and a number of independent comparison goods retailers. The centre is, for the most part, in good health and there were no vacant units at the time of our survey. However, the volume of passing traffic is an issue that impacts on the quality of the environment.

5.335 We recommend that the centre boundary is revised to remove the residential properties on the southern end of the shopping parade. However, we consider that the level of provision is such that Victoria Road East appropriately performs the role of a small local centre.

Leicester: Wakerley Road/Ethel Road

5.336 Wakerley Road/Ethel Road principally provides for convenience top-up shopping needs and does not accommodate any substantial leisure or other service offers. A small number of independent retailers complement the Tesco store, which anchors the centre and generates a healthy level of activity within the shopping area. However, the environmental quality of the centre is poor, which detracts from the attractiveness of the centre as a whole. In addition, there is a vacant public house building, which also has a detrimental impact on the appearance of the centre.

5.337 Notwithstanding this, Wakerley Road/Ethel Road is served by a relatively generous car park and the supermarket performs an important local role. Accordingly, we consider that Wakerley Road/Ethel Road performs the role of a local centre (albeit it is a local centre of a relatively small scale).

Leicester: Walnut Street

5.338 Walnut Street comprises a small parade of seven units. However, the northern part of the centre is mostly vacant and appears to be somewhat rundown. The design of these units appears to achieve low levels of surveillance and pedestrian activity, and the area does not feel as secure as it could as a result. Conversely, the southern part of the centre appears to be performing well. This area has good environmental quality, feels safe and secure and has reasonably high levels of pedestrian activity.

5.339 There is a grocery shop on the southern edge of Walnut Street's defined centre boundary that we would ordinarily expect to form part of the centre. We therefore recommend that the boundary is extended to include this unit.

5.340 Notwithstanding this, given the limited number of units within the shopping area, we consider that Walnut Street currently performs the role of a neighbourhood parade and that the centre should be re-designated accordingly.

Leicester: Welford Road/Gainsborough Road

5.341 This centre comprises 50 units on either side of Welford Road. The centre has a strong leisure service offer, which comprises mainly of hot foot takeaways and restaurants. There are also many specialist comparison goods retailers present in the centre. However, Welford Road/Gainsborough Road has a low representation of financial and business service uses and also accommodates four vacant units.

5.342 The centre is of a generally poor environmental quality, which is primarily caused by the impact of Welford Road itself. Notwithstanding this, the centre provides a wide variety of services and facilities that serve the large surrounding residential area. Accordingly, it is considered that Welford Road/Gainsborough Road appropriately performs the role of a local centre. There is a solicitor's office adjacent to the centre boundary, which we recommend should be included within the centre boundary.

Leicester: Welford Road/York Road

5.343 Welford Road/York Road local centre comprises 21 units, which are split across three areas in close proximity to one another. Despite being located extremely close to Leicester city centre, the centre forms an independent shopping area that has an important function in serving the needs of the surrounding business, educational and residential communities. Whilst the centre has a limited number of convenience and comparison retailers, the food and drink leisure service sector is very well represented.

5.344 The centre appears to be performing reasonably well and moderate levels of pedestrian activity were evident at the time of our survey. In addition, the centre is within reasonable walking distance of a large number of people and has a good access to public transport, although vehicular access is somewhat problematic. With the exception of the busy road that passes through the centre, Welford Road/York Road benefits from a reasonable environmental quality and generally feels safe and secure. However, it is subject to a high level of vacancy.

5.345 Notwithstanding this, given the range of goods and services on offer, we consider that Welford Road/York Road appropriately performs the role of a local centre. We also recommend that the centre boundary be revised to include Bannatyne's Health Club, which is situated directly adjacent to the current centre boundary.

Leicester: Wellinger Way

5.346 Wellinger Way was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006).

5.347 The former local centre boundary contains four units, which are currently fully occupied and the area appears to be in good overall health with no major concerns. Furthermore, we consider there to be a sufficient concentration of retail units and the level of day-to-day goods and services that may be expected in a small neighbourhood parade. We therefore recommend that Wellinger Way is re-designated accordingly.

Leicester: Wharf Street North

5.348 Wharf Street North is surrounded by an area of mainly of three and four storey flats. Wharf Street North accommodate eight retail units which would benefit from some refurbishment. There was a relatively low level of pedestrian activity at the time of our visit.

5.349 There is currently one vacancy within the centre. Wharf Street North only has a very limited number of units which are all of a relatively small scale; accordingly, we consider that it performs the role of a neighbourhood parade and recommend that it is re-designated accordingly.

Leicester: Wheatland Road

5.350 Wheatland Road accommodates just six units, one of which was vacant at the time of our visit. Whilst there appeared to be a relatively healthy level of activity around Wheatland Road, the shopping terrace is not particularly attractive and fails to positively contribute to the visual amenity of the area.

5.351 Whilst we recommend that Wheatland Road's boundary is extended to incorporate the adjacent community centre, we consider that its modest retail and service offer falls short of the level of provision which would ordinarily be expected within a local centre. Accordingly, we recommend that it is re-designated as a neighbourhood parade.

Leicester: Wood Hill

5.352 Wood Hill is a small but healthy local centre of 10 units, which accommodates a bank, post office and travel agent alongside a range of convenience and comparison retail units. The 'back street' location of the centre reinforces the community spirited atmosphere. The environment and surroundings are generally well maintained and are fit for purpose, providing an important venue to meet local shopping needs.

5.353 There are two units on the edge of the centre boundary that contribute to the centre's offer and we consider that these units should be included within the boundary. Given the range of facilities available at Wood Hill, we consider that it performs the role of a small local centre.

Leicester: Wyngate Drive

5.354 Wyngate Drive was formally designated as a local centre within the retail hierarchy of the City of Leicester Local Plan (1994). However, the shops are not designated within the Leicester Core Strategy (2014) or the City of Leicester Local Plan Proposals Map (2006).

5.355 The former local centre boundary contains three units, which are currently all occupied. However, the shops suffer from low pedestrian activity and their location encourages car use. In addition, the shop frontage would benefit from improvements. Furthermore, Wyngate Drive has an insufficient concentration of retail units to be considered as a neighbourhood parade. We therefore recommend that the shops continue to not be designated within the retail hierarchy.

Blaby: Cosby

5.356 Cosby is an attractive and important shopping venue which is able to meet some of the day to day needs of local residents. However, the centre was very quiet at the time of our visit and a number of the units appeared to close on certain weekdays.

5.357 Despite this, at the time of our visit there were no vacant units and the centre appears to be generally in good health. The two convenience stores on the corner of Park Road, as well as the Bulls Head Pub and Cosby working men's club are located in reasonably close proximity to the retail and service facilities and help complement their offer. However, Cosby is very small in scale and given the limited range of goods and services on offer, it is not considered to function as a local centre in practice. Accordingly, we recommend that it is re-designated as a neighbourhood parade.

Blaby: Countesthorpe

5.358 Countesthorpe appears to be a vital and viable centre. There are no vacant units and the sense of safety and levels of accessibility are both good. In addition, parts of the centre are of a good environmental quality. However, the eastern part of the centre is of a slightly tired appearance and would benefit from some refurbishment.

5.359 Due to the range of retail and service uses provided in Countesthorpe, we consider that it appropriately performs the role of a local centre. However, we do not consider that the Co-operative Food store at Main Street is well integrated into the centre and believe that this is more accurately considered an edge of centre facility. Accordingly, we do not consider that it should be included within the centre and recommend that the centre boundary is drafted accordingly.

Blaby: Glen Parva

5.360 The retail parade at the junction of Grange Road and Leicester Road has a good range of uses for a retail venue of its size. These combine to help serve the needs of the surrounding community, but are also appear able to generate custom from passing traffic on Leicester Road.

5.361 Glen Parva appears to be in generally good health judging from the lack of vacancies and the level of pedestrian activity that was observed during the course of our visit. The centre appears safe and secure and is generally of a good environmental quality. However, the frontage of one unit currently detracts from the centre's quality. Whilst Glen Parva appears to be a well used community resourse, its very small scale and the limited size of units means that it comprises a neighbourhood parade and we recommend that it is re-designated accordingly.

Blaby: Huncote

5.362 Huncote currently comprises seven commercial units that draw their custom from the village community and from passing trade on Main Street. Given the limited size of the surrounding settlement, Huncote provides a reasonable mix of shops and services, and includes a convenience unit and a limited range of leisure and retail services.

5.363 Huncote appears to be performing well in all aspects of its health and there were no vacant units at the time of our visit. However, we do not consider that the vehicle repair uses to the north of Main Street are an integral part of Huncote's offer and recommend that its boundary is redrawn to reflect this. As a consequence, Huncote effectively comprises six units of a limited scale and we therefore consider that it functions as a neighbourhood parade and should be re-designated as such.

Blaby: Kirby Muxloe

5.364 Kirby Muxloe forms a small retail venue which incorporates some key services for the local community including a convenience store, Post Office and hairdresser. Kirby Muxloe appears to be performing very well in all aspects of its health and there were no vacant units at the time of our visit. Given its limited scale, we do not consider that Kirby Muxloe provides the range of goods and services which would ordinarily be expected in a local centre and we therefore recommend that it is re-designated as a neighbourhood parade.

Blaby: Leicester Forest East (Braunstone Crossroads)

5.365 Braunstone Crossroads has a very strong medical service offer, as well as a Co-operative Food store that caters for local top-up shopping needs. As the name suggests, Braunstone Crossroads is adjacent to two busy roads (Braunstone Lane and Hinckley Road) which help to provide passing trade, but which also detract from the locality's environmental quality. In addition, the visual appearance of the units is relatively poor, particularly on the eastern side of Park Drive. Despite this, the centre benefits from good levels of footfall and generally feels safe and secure. There were no vacant units at the time of our visit.

5.366 Given the very low number of retail units and the limited role of Braunstone Crossroads, we consider that it functions as a neighbourhood parade in practice and we recommend that it should be re-designated accordingly.

Blaby: Sapcote

5.367 Sapcote provides a very limited number of commercial units which are spread over a relatively wide area. As such, there is no particular concentration of commercial activity.

5.368 At present, the local centre designation is based around the Co-operative Food convenience store and Ellce Hair and beauty. However, even these two facilities are somewhat detached from one another. Whilst facilities in Sapcote individually appear to be vital and viable, the units (which also comprise several shops, a pub, social club and library) are dispersed and do not take the form of a 'centre'. Accordingly, given the lack of cohesion (and relatively limited number of units), we recommend that consideration is given to de-allocating Sapcote entirely from the retail hierarchy.

Blaby: Stoney Stanton

5.369 Stoney Stanton has a thriving centre with a diverse range of services and facilities that cater for a significant portion of the day to day needs of the local and wider community. The convenience offer is particularly strong, with over a quarter of the units being within this sector. The centre also had no vacant units at the time of our survey.

5.370 The shopping area appears to generally be in good health in most respects, although the number and frequency of bus services is very limited. Whilst the centre is currently defined as a rural centre, we recommend that it is re-designated as a local centre in order that consistent terminology is used in defining Blaby's hierarchy of centres.

Blaby: Whetstone

5.371 Whetstone is a small retail venue comprising seven units. Despite the village's relatively large population and good transport links, the centre appears to underperform. It is of a relatively low environmental quality and the sense of safety and security could be improved. There are also several vacant buildings and low levels of pedestrian activity in the area surrounding the current centre boundary.

5.372 There are a number of commercial units at the edge of the centre boundary that contribute greatly to Whetstone's overall offer. Accordingly, we recommend that Whetstone's boundary is extended to incorporate some of these units. However, even allowing for this extension, Whetstone provides a limited range of shops and services, which we consider function as the level of a neighbourhood parade rather than a local centre. Accordingly, we recommend that it should be re-designated accordingly.

Blaby: Motorway Retail Area – Fosse Park, Grove Farm Triangle and Asda Superstore

5.373 Fosse Park is very large retail park that is split across three areas. The units are almost exclusively occupied by national operators, mainly offering comparison goods, although there are two large food superstores and several restaurants. Fosse Park has excellent highway accessibility and is an important sub-regional shopping destination. However, Fosse Park is also able to make a contribution to meeting the shopping needs of more local communities due to the presence of the food superstores and the Boots store.

5.374 The centre appears to be in good health with low levels of vacancy, generally high pedestrian flows and feels a safe and secure environment in which to shop. However, Fosse Park South was also observed to have significantly lower levels of pedestrian flows than the other elements of the retail park. In addition, the retail park is only generally accessible by vehicular traffic and has only limited accessibility by bike and on foot. Given the size of the units and the types of operator present, it is considered that Fosse Park functions as an out of centre retail park.

Summary

5.375 As set out in some detail earlier in this section, we consider Leicester city centre to be a generally healthy centre, which performs a vital role for residents of the Borough and the wider sub-region. Retailer representation in the city centre is strong, with the vast majority of the major multiple national retailers being represented in the centre. The extension of the Highcross shopping centre has helped to maintain and enhance this position.

5.376 The city centre provides a particularly strong comparison goods and service offer, with the convenience shopping offer led by Leicester Market. Council initiatives alongside private investment in recent years have together brought about considerable improvements to the built environment, which are clearly beneficial to the city centre's shopping experience. It is evident from our research and survey of the centre that Leicester exhibits many of the characteristics of a 'vital' and 'viable' centre and plays an important role in meeting the needs of both residents of the Borough and visitors from further afield. Whilst its overall vacancy rate is slightly above national average, there are relatively few vacancies on the principal shopping streets.

5.377 The district and local centres within the Leicester and Blaby authority areas are distributed in a reasonably equitable manner and, as a consequence, appear to be generally well used. Whilst certain centres have a focused convenience and service offer, others (such as Belgrave Road/Melton Road district centre) accommodate more varied, specialist retailers, for whom city centre premises may not be a viable option.

5.378 The majority the centres appear to be in good health and are performing well. However, there are a small number of centres (such as Barley Croft Centre and Walnut Street) which appear to be under-performing. These centres typically have relatively high vacancy rates, low levels of pedestrian activity and a lesser environmental quality.

5.379 Our assessment has identified a number of centres that do not perform a role and function that is commensurate with their designation. For example, we do not consider that Hamilton provides a wide enough retail offer or the community facilities that we would expect to be located within a district centre. In addition, we consider that 26 local centres in the Leicester administrative area and a further five local centres in the Blaby administrative area more accurately take the form of a neighbourhood parade in practice.

5.380 Retail and service provision in Sapcote in Blaby is widely dispersed and is not consistent with the concentrated offer that would normally be found in a local centre or neighbourhood parade. Accordingly, we recommend that consideration is given to the de-allocation of Sapcote as a defined centre.

5.381 Our health check assessments have also identified instances where centres have either grown or units have been lost to non-main town centre uses. Several centres also have community facilities adjacent to their boundary, which make an active contribution to the centre's offer and also help support linked shopping trips. Consequently, we have found in a number of instances that the centre boundary no longer reflects how the centre functions on a day to day basis. Accordingly, we have made a series of recommendations (many of which are relatively minor in their scope) to revise the boundaries of particular centres in order that they better reflect the provision and functionality of particular centres 'on the ground'.

5.382 Our summarised recommendations in respect of the current centres in the Leicester administrative area are as follows.

- **Designate as Local Centre rather than as a District Centre**
  Hamilton.

- **Designate as two Local Centres rather than as a single District Centre**
  Uppingham Road East.

- **Designate as a Local Centre**
  Aikman Avenue, Allandale Road/Francis Street, Asquith Boulevard, Aylestone Road/Cavendish Road, Aylestone Village, Blackbird Road/Groby Road/Woodgate, Catherine Street/Canon Street, Downing Drive, East Park Road (North), Egginton Street, Evington Village, The Exchange, Fosse Road North, Gipsy Lane, Green Lane Road/Bridge Road, Hartington Road, Hinckley Road, Home Farm/Strasbourg Drive, King Richard's Road, Lockerbie Walk, London Road, Loughborough Road, Malabar Road, Marwood Road, Melbourne Road, Nedham Street, Netherhall Road, Queen's Road, Saffron Lane/Burnaston Road, Saffron Lane/Cavendish Road, Saffron Lane/Duncan Road, Saint Saviour's Road (West), Saint Stephen's Road, Sandshill Avenue, Sparkenhoe Street, Swinford Avenue, Thorncourt Road, Victoria Road East, Wakerley Road/Ethel Road, Welford Road/Gainsborough Road, Welford Road/York Road and Wood Hill.

- **Designate as Neighbourhood Parades rather than as Local Centres**
  Aylestone Road/Hazel Street, Aylmer Road, Barley Croft Centre, Beaumont Lodge, Bede Park, Belgrave Boulevard, Burnham Drive, East Park Road (South), Fosse Road South/Hinckley Road, Fullhurst Avenue, Gervas Road, Guthridge Crescent, Harrison Road, Heyford Road, Humberstone Road/Farringdon Street, Humberstone Village, Lanesborough Road, Nicklaus Road, Norwich Road, Ryder Road (Braunstone Frith), Saint Saviour's Road (East), Sharmon Crescent, Southfields Drive, Walnut Street, Wharf Street North and Wheatland Road.

- **Re-designate former Local Centres as Neighbourhood Parades**
  Abbey Lane, Berners Street, Catherine Street/Brandon Street, Fosse Road South/Harrow Road, Fosse Road South/Upperton Road, Green Lane Road/Coleman Road, Meadvale Road, Parkstone Road/Cardinals Walk, Raven Road, Upperton Road/Wilberforce Road, Wellinger Way.

- **Former Local Centres to remain undesignated**
  Ambassador Road, Bateman Road, Bonney Road, Bringhurst Road, Buckminster Road/Whitwick Way, Cantrell Road, Eastwood Road, Gamel Road, Keightley Road, Petworth Drive, Redmarle Road, Rowlatts Hill Road (Radstone Walk), The Parkway, Wyngate Drive.

- **Redraft boundaries**
  Abbey Lane, Aikman Avenue, Allandale Road/Francis Street, Asquith Boulevard, Aylestone Road/Cavendish Road, Aylestone Village, Barley Croft Centre, Beaumont Leys, Beaumont Lodge, Bede Park, Belgrave Road, Berners Street, Blackbird Road/Groby Road/Woodgate, Catherine Street/Canon Street, Downing Drive, Evington Road, Evington Village, The Exchange, Fosse Road North, Fullhurst Avenue, Gervas Road, Gipsy Lane, Green Lane Road/Bridge Road, Hamilton, Harrison Road, Hartington Road, Home Farm/Strasbourg Drive, Humberstone Road/Farringdon Street, King Richard's Road, Lockerbie Walk, London Road, Loughborough Road, Malabar Road, Marwood Road, Melbourne Road, Narborough Road, Nedham Street, Netherhall Road, Norwich Road, Queen's Road, Saffron Lane/Burnaston Road, Saffron Lane/Cavendish Road, Saffron Lane/Duncan Road, Saint Saviour's Road (West), Saint Stephen's Road, Southfields Drive, Thorncourt Road, Upperton Road/Willberforce Road, Uppingham Road (East), Victoria Road East, Walnut Street, Welford Road/Gainsborough Road, Welford Road/York Road, Wheatland Road and Wood Hill.

5.383 Our summarised recommendations in respect of the current centres in the Blaby administrative area are as follows.

- **Designate as a Local Centre**
  Countesthorpe and Stoney Stanton.

- **Designate as Neighbourhood Parades rather than as Local Centres**
  Cosby, Glen Parva, Huncote, Kirby Muxloe, Leicester Forest East and Whetstone.

- **Deallocate as a Local Centre**
  Sapcote.

- **Redraft boundaries**
  Blaby, Cosby, Countesthorpe, Enderby, Glenfield, Huncote and Narborough.

6.0 Population and Expenditure

6.01 This section of the report assesses the current population and available expenditure (for both convenience and comparison goods) across the Study Area.

Study Area Population

6.02 The population within each postal code sector and each zone at 2015 has been calculated using Experian Micromarketer G3 data (2013 estimate, which was issued in October 2014).

6.03 In estimating the future population of the Study Area, consideration has been given to each authority's own population projections over the period to 2031. In this regard, we have utilised the population projections for each authority area which underpin the Leicester and Leicestershire Strategic Housing Market Assessment, which was undertaken by GL Hearn and which reported in June 2014. The authority-wide population projections we rely on are set out below at Table 6.1.

Table 6.1: Leicester and Blaby Authority Area Population Projections (2015 to 2031)

Year	Leicester	Leicester Annual Growth	Blaby	Blaby Annual Growth
2015	340,054	-	96,882	-
2016	342,727	2,673	97,591	709
2017	345,329	2,602	98,286	695
2018	347,911	2,582	98,964	678
2019	350,468	2,558	99,649	685
2020	353,002	2,534	100,318	670
2021	355,515	2,513	100,977	659
2022	357,998	2,484	101,612	635
2023	360,484	2,486	102,215	603
2024	362,929	2,445	102,798	583
2025	365,310	2,380	103,361	563
2026	367,636	2,326	103,904	542
2027	369,932	2,296	104,423	519
2028	372,177	2,245	104,930	507
2029	374,339	2,162	105,431	502
2030	376,425	2,086	105,921	489
2031	378,485	2,060	106,393	472
Total		**38,431**		**9,510**

Source: Derived from 'Proj 2' projections set out at Tables B41 and B45 of the Leicester and Leicestershire Strategic Housing Market Assessment (June 2014)

6.04 Table 6.1 identifies a projected increase in Leicester of 38,431 persons over the period between 2015 and 2031, resulting in a population of 378,485 at 2031. In Blaby there is a projected increase of 9,510 persons over the period between 2015 and 2031, resulting in a population of 106,393 at 2031.

6.05 The Leicester administrative area broadly equates to Study Area Zones 6, 7, 8, 9, 10, 11 and 12 (the latter zone encroaching into Blaby). The Blaby administrative area incorporates Zone 16 in its entirety, but also parts of Zones 1, 2, 3, 4, 5, 11, 13 and 15. Accordingly, it is necessary to apportion growth which is identified within the respective authority areas to Study Area zones.

6.06 In doing so, we have had regard to the distribution of future housing growth which is being planned for by each authority across their administrative area.

6.07 Leicester has reviewed its Leicester City Strategic Housing Land Availability Assessment of 2014 and has provided us with a summarised schedule setting out the future distribution of its housing supply across the administrative area. This is presented below as Table 6.2.

Table 6.2: Leicester 2015 Housing Supply by Study Area Zone

Zone	Housing Supply	Proportion of Overall Supply
6	4,592	22%
7	737	4%
8	683	3%
9	2,787	14%
10	4,058	20%
11	1,334	7%
12	6,264	31%
Total	**20,455**	**100%**

6.08 We have applied the distribution of supply identified in the final column of Table 6.2 to the level of population growth identified in Table 6.1 for Leicester to identify population growth across all of the Leicester zones at each reporting period to 2031.

6.09 In respect of Blaby, Zone 16 is the clear focus for the authority's future population growth. Other zones are also split across multiple authority areas. Blaby has provided us with a summary of all extant residential commitments[33] at 2015, which we summarise below at Table 6.3.

Table 6.3: Blaby 2015 Housing Supply by Study Area Zone

Zone	Commitments	Proportion of Overall Supply
1	522	7%
2	184	3%
3	0	0%
4	1,027	14%
5	0	0%
11	108	2%
13	0	0%
15	411	6%
16	4,852	68%
Total	**7,104**	**100%**

6.10 Zone 16 accommodates 68% of Blaby's existing housing supply and we have therefore assumed that the same proportion of its projected population growth will be accommodated in the zone. Zone 11 straddles both Leicester and Blaby and we have added the small amount of population growth identified to come forward in the Blaby part of Zone 11 to that identified in the Leicester part.

6.11 We consider the level of growth apportioned to other Blaby zones to be largely unexceptional. The other zones are also split across multiple local authority areas and we consider that the most appropriate approach for Zones 1, 3, 4, 5, 13 and 15 is to utilise the population projection figures provided by Experian (which are considered to be broadly consistent with the identified distribution of Blaby's housing land supply).

6.12 We adopt a slightly different approach for Zone 2, which accommodates Earl Shilton (within the Hinckley and Bosworth administrative area). We are aware that Earl Shilton is the subject of an Area Action Plan (adopted September 2014), which provides for the development of at least 1,600 dwellings in the town in the period to 2025. We have assumed that each dwelling will provide accommodation for 2.0 persons (which allows for a reduction in the current occupancy rate going

[33] Commitments include allocated dwellings, outline planning permissions, detailed planning permissions, dwellings under construction and sites with a Council resolution to grant permission

forward). Accordingly, we consider that the population of Earl Shilton could increase by 3,200 persons in the period between 2015 and 2025.

6.13 We have taken the population increase for the remainder of Zone 2 from Experian's own projections, but have added to this the 3,200 estimated population growth in Earl Shilton to 2025 (apportioned on a pro rata basis to 2025). After 2025, we rely again on Experian's projected annual population increases for the zone.

6.14 Utilising the above methodology, Table 6.4 sets out our estimate of future population growth across the Study Area using Experian Micromarketer G3 data and housing land supply data provided by Leicester City Council and Blaby District Council.

Table 6.4: Study Area Population by Survey Zone (2015 to 2030)

Zone	2015	2020	2025	2030	2031	Source of Data
1	56,288	58,092	59,796	61,223	61,459	Experian
2	22,806	23,517	24,190	24,738	24,835	Experian
3	15,143	15,692	16,223	16,657	16,738	Experian
4	37,267	38,156	39,142	39,972	40,124	Experian
5	26,845	27,897	28,911	29,853	30,021	Experian
6	51,653	54,560	57,323	59,818	60,280	Leicester projections
7	38,024	38,491	38,934	39,334	39,334	Leicester projections
8	36,784	37,216	37,627	37,998	38,067	Leicester projections
9	45,990	47,754	49,431	50,945	51,226	Leicester projections
10	30,531	33,100	35,541	37,746	38,155	Leicester & Blaby projections
11	61,954	62,850	63,647	64,364	64,467	Leicester projections
12	92,527	96,492	100,261	103,665	104,296	Experian
13	45,454	45,633	46,423	47,204	47,344	Experian
14	86,072	89,745	93,358	97,091	97,736	Experian
15	27,253	29,367	31,457	32,123	32,248	Experian with additional Earl Shilton allowance
16	28,982	31,329	33,407	35,155	35,477	Blaby projections
Total	**703,573**	**729,890**	**755,671**	**777,888**	**781,809**	

Source: Experian Micromarketer G3 2014 data release and derived from Leicester and Blaby housing land supply data

6.15 The above table indicates that Experian's forecast that the Study Area population will increase from 703,573 at 2015 to 781,809 at 2031, equating to an increase in population of 78,236 persons. This equates to an increase over the 16 year period of 4,890 persons per annum.

Retail Expenditure

6.16 In order to calculate per capita convenience and comparison goods expenditure, we have again utilised Experian Micromarketer G3 data which provides detailed information on local consumer expenditure which takes into consideration the socio-economic characteristics of the local population. Experian is a widely accepted source of expenditure and population data and is regularly used by WYG in calculating retail capacity.

6.17 The base year for the Experian expenditure data is 2013. Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 12.1, which was published in October 2014. Appendix 3 of the Retail Planner Briefing Note identifies the following annual growth forecasts for convenience and comparison goods which inform our assessment.

Table 6.5: Expenditure Growth Forecasts

Year	Convenience (%)	Comparison (%)
2015	0.5	4.4
2016	0.4	3.1
2017	0.5	3.0
2018	0.4	3.0
2019	0.7	3.2
2020	0.7	3.2
2021	0.5	3.0
2022	0.8	3.3
2023	0.8	3.3
2024	0.8	3.3
2025	0.7	3.3
2026	0.7	3.2
2027	0.6	3.2
2028	0.8	3.3
2029	0.6	3.3
2030	0.6	3.3
2031	0.7	3.4

Source: Appendix 3, Retail Planner Briefing Note 12.1 (October 2014)

6.18 The latest growth forecasts suggest that the recovery from the downturn in the economy is well underway, albeit growth in convenience goods expenditure will improve over the medium and long term when compared to the current position. For convenience goods, Experian forecasts +0.5%

annual growth at 2015, which is then forecast to increase to +0.8% at 2022. Whilst there is some deviation in the rate is forecast thereafter, the rate of annual convenience goods growth forecast to 2031 does not fall below +0.6%.

6.19 In contrast, Experian identifies an immediate and relatively strong annual comparison growth rate of +4.4% at 2015. A drop in the rate of growth to +3.1% is anticipated at 2016, with growth rates thereafter to 2031 forecast to be extremely stable, within the range +3.0% to +3.4%.

6.20 Growth in expenditure forecast in the longer term (beyond the next ten years) should be treated with caution given the inherent uncertainties in predicting the economy's performance over time. Assessments of this nature should therefore be reviewed on a regular basis in order to ensure that forecasts over the medium and long are reflective of any changes to relevant available data.

6.21 Experian Retail Planner Briefing Note 12.1 also provides a forecast as to the proportion of expenditure which will be committed through special forms of trading (comprising 'non-store retailing', such as internet sales, TV shopping and so on) over the reporting period. We have 'stripped out' any expenditure which survey respondents indicated was committed via special forms of trading and instead have made an allowance derived from Experian's recommendation.

6.22 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a physical store's shelves or stockroom (particularly in the case of convenience goods). Accordingly, expenditure committed in this manner acts to support stores and should be considered 'available' to tangible retail destinations.

6.23 Accordingly, in order not to overstate the influence of expenditure committed via special forms of trading, our approach is based on Experian's 'adjusted' figure (provided at Appendix 3 of its Retail Planner Briefing Note) which makes an allowance for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading cited below at Table 6.6 is 'stripped out' of the identified expenditure as it is not available to stores within the Study Area.

Table 6.6: Special Forms of Trading Forecasts

Year	Convenience	Comparison
2015	2.8%	12.5%
2020	4.0%	15.7%
2025	4.9%	15.9%
2030	5.4%	15.6%
2031	5.6%	15.5%

Source: Appendix 3, Experian Retail Planner Briefing Note 12.1 (October 2014)

6.24 Based on the above growth rates and special forms of trading allowances, it is possible to produce expenditure estimates for each survey zone under each population growth scenario at 2015, 2020, 2025, 2030 and 2031. In doing so, our assessment takes into account both per capita retail expenditure growth and population change.

Convenience Goods Expenditure

6.25 Taking into consideration the above increases in population and per capita expenditure, it is estimated that, at 2015, the resident population of the Study Area generates some £1,225.17m of convenience goods expenditure[34]. Available convenience goods expenditure is then forecast to increase to £1,465.26 at 2031, which represents an increase of £240.09m (or 19.6%) between 2015 and 2031.

Table 6.7: Total Available Study Area Expenditure – Convenience Goods (£m)

2015 (£m)	2020 (£m)	2025 (£m)	2030 (£m)	2031 (£m)	Growth 2015 2020 (£m)	Growth 2015 2025 (£m)	Growth 2015 2030 (£m)	Growth 2015 2031 (£m
1,225.17	1,288.92	1,370.90	1,449.29	1,465.26	63.74	145.73	224.12	240.09

Source: Table 2a, Appendix 7
In 2013 prices

Main Food and 'Top-Up' Shopping

6.26 The proportion of convenience goods expenditure which is committed through main food shopping trips and through 'top-up' shopping trips has been estimated with reference to respondents' answers to Question 5 and Question 15 of the household survey, which ask respondents to estimate their weekly main food shopping expenditure and weekly top-up shopping expenditure. We have analysed responses to these questions to derive an estimate of the split between main and top-up expenditure on a zonal basis. Across the whole of the Study Area, we calculate (by adding together our estimates of the monetary split between main and top up shopping expenditure within each zone) that the proportion of convenience goods expenditure directed to respondents' main food shopping destination

[34] Expressed in 2013 prices, as is every subsequent monetary value

equates to 78.6% of their overall convenience shopping expenditure. The remaining 21.4% of expenditure (which will typically be spent on regular purchases such as milk, bread and so on) is therefore attributed to the respondents' top-up convenience shopping destination. Our estimate of the split between these two types of expenditure on a zonal basis is provided below at Table 6.8.

Table 6.8: Assumed Split of Convenience Goods Expenditure Between Main and Top-Up Shopping

Zone	Main Food	Top Up
1	79.3%	20.7%
2	80.5%	19.5%
3	76.5%	23.5%
4	75.8%	24.2%
5	79.7%	20.3%
6	75.6%	24.4%
7	74.6%	25.4%
8	78.3%	21.7%
9	78.3%	21.7%
10	78.1%	21.9%
11	79.1%	20.9%
12	79.9%	20.1%
13	80.5%	19.5%
14	83.4%	16.6%
15	79.0%	21.0%
16	78.4%	21.6%

Source: Derived from Table 2B, Appendix 7

6.27 By applying these estimates to the identified resident population of the Study Area, convenience goods expenditure at 2015 committed through 'main food' shopping trips is estimated to be £969.05m and through 'top up' shopping trips is estimated to be £256.12m.

Comparison Goods Expenditure

6.28 For comparison goods, Table 6.9 sets out our estimation that the resident population of the Study Area will generate some £1,755.2m of comparison goods expenditure at 2015. Available comparison goods expenditure is then forecast to increase to £3,125.56m at 2031, which represents an increase of £1,370.32m (or 78.1%) between 2015 and 2031.

6.29 Whilst the identified expenditure increase is very significant indeed, the rate of growth is more modest than that previously achieved, principally because of the expectation that an ever increasing proportion of comparison goods expenditure will be committed through special forms of trading (most particularly, internet shopping).

Table 6.9: Total Available Study Area Expenditure Under Two Population Scenarios – Comparison Goods (£m)

2015 (£m)	2020 (£m)	2025 (£m)	2030 (£m)	2031 (£m)	Growth 2015 2020 (£m)	Growth 2015 2025 (£m)	Growth 2015 2030 (£m)	Growth 2015 2031 (£m
1,755.24	2,040.27	2,475.30	3,004.88	3,125.56	285.03	720.06	1,249.64	1,370.32

Source: Table 8, Appendix 7
In 2013 prices

6.30 For the purposes of this Study, comparison goods expenditure has been divided into eight sub-categories: 'DIY' 'Electrical' and 'Furniture' (these three categories collectively being referred to as bulky goods)' and, 'Clothing & Footwear', 'CDs, DVDs and Books', 'Health and Beauty/Chemist Goods', 'Small Household Goods' and 'Toys, Games, Bicycles and Recreational Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis.

6.31 In considering the above, it should be noted that if an excess of expenditure manifests itself within the Study Area, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:

- Existing development proposals;
- Expected changes in shopping patterns; and
- The future efficiency of retail floorspace.

7.0 Retail Capacity in Leicester and Blaby Authority Areas

7.01 We have examined the need for new convenience and comparison goods floorspace over the five year reporting periods to 2031 (i.e. at 2015, 2020, 2025, 2030 and 2031). At the outset, it is important to note that an assessment in the long term should be viewed with caution, due to the obvious difficulties inherent in predicting the performance of the economy and shopping habits over time. In any event, any identified capacity should not necessarily be viewed as justification of new retail floorspace outside of centres as this could prejudice the implementation of any emerging town centre redevelopment strategies and the development of more central sites which may be currently available or which could become available over time.

7.02 A complete series of quantitative capacity tables are provided at Appendix 7 to provide further detail in terms of the step-by-step application of our quantitative assessment methodology.

Capacity Formula

7.03 For all types of capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) (allowing for population change and retail growth) *less* Turnover (£m) (allowing for improved 'productivity') *equals* Surplus or Deficit (£m).

7.04 **Expenditure (£m)** – The expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The expenditure is estimated with reference to a number of factors, namely:

- Growth in population;
- Growth in expenditure per person per annum; and
- Special Forms of Trading (e.g. internet shopping, catalogue shopping and so on).

7.05 **Turnover (£m)** – The turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Mintel Retail Rankings and Verdict UK Grocery Retailers reports – independent analysis which lists the sales densities for all major multiple retailers.

7.06 **Surplus/Deficit (£m)** – This represents the difference between the expenditure and turnover figures outlined above. A surplus figure represents an effective under provision of retail facilities within the Study Area (which, all things being equal, would suggest that additional floorspace could be supported), whereas a deficit would suggest a quantitative overprovision of retail facilities.

7.07 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required. The level of floorspace will vary dependent on the type of retailer proposed and the type of goods traded. For example, in the case of comparison goods, non-bulky goods retailers tend to achieve higher sales densities than bulky goods retailers. However, within the bulky goods sector itself there is significant variation, with electrical retailers tending to have a much higher sales density than those selling DIY or furniture goods.

Capacity for Future Convenience Goods Floorspace in Leicester

7.08 In order to ascertain the likely need for additional convenience goods floorspace in Leicester and Blaby, it is first necessary to consider the performance of the current provision. Given the geography of the authority areas and their reasonably strong retention of convenience goods expenditure, it is assumed that the future convenience goods expenditure available to both Leicester and Blaby will be commensurate with their current market share.

7.09 Table 7.1 sets out the current convenience goods trading position in Leicester compared against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace and projects this forward to 2031. The benchmark turnover differs for each operator based on its average turnover per square metre throughout the country. Although robust up-to-date information is available in terms of the convenience goods floorspace provided by large foodstores, it can be more difficult to quantify the extent of local convenience provision as there is no single comprehensive database to rely upon. Where we have been unable to verify the exact quantum of floorspace provided by existing smaller-scale convenience stores, we have assumed that stores are trading 'at equilibrium' (i.e. the survey-derived turnover equates to the expected level of turnover).

7.10 For each convenience goods retail destination, consideration has been given as to whether any of its turnover is likely to be derived as 'inflow' from outside the Study Area. However, the Study Area is relatively extensive in its scope and we consider it unlikely that residents of areas further afield (such as Coalville, Loughborough and Melton Mowbray) will generally travel to Leicester in very significant numbers to undertake food shopping at stores of a relatively modest scale. However, we do believe that larger convenience goods stores and certain convenience goods retailers in the city centre will benefit from some trade which results from visitors and commuters from outside the area. Accordingly, we have assumed that certain convenience goods shopping destinations will benefit from an additional 2.5% to 5.0% of their turnover deriving from outside of the Study Area. We set out all our assumptions in this regard within Table 5 of Appendix 7.

7.11 Our assessment is based upon a 'goods based' approach, which disaggregates expenditure by category type, and it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, compact discs, clothing and household goods. To account for this, the typical ratio between convenience/comparison goods provision for each operator[35] has been applied to the estimated net floorspace of each foodstore[36]. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.

7.12 Whilst survey results are commonly accepted as a means by which to identify existing shopping patterns, their findings should be treated with a 'note of caution' as they can have a bias towards national multiple retailers and, as a consequence, may understate the role of smaller grocery stores and independent retailers. Notwithstanding this, our methodology seeks to minimise such occurrences.

7.13 Our assessment identifies that taking all convenience goods retail facilities in the Leicester administrative area together, the expected benchmark turnover of provision is £467.35m per annum at 2015, which is £25.00m less than the identified survey-derived turnover of £492.35m. This suggests that, taken cumulatively, existing convenience goods provision in the Leicester administrative area is 'overtrading' when compared to its expected turnover. Accordingly, there is an expenditure surplus which could support additional food retail provision.

7.14 It should also be noted that there are instances where specific facilities trade very strongly or relatively poorly. For example, the Aldi store at Woodgate in Zone 12 has an estimated convenience goods benchmark turnover of £6.18m, but turns over an estimated £24.12m of convenience goods expenditure. Another Aldi store, at Aylestone Road in Zone 11, has an estimated convenience goods benchmark turnover of £6.19m, but turns over an estimated £19.16m of convenience goods expenditure. The Asda store at Exploration Drive in Zone 9 has an estimated convenience goods

[35] Derived from Verdict UK Food & Grocery 2014 Company Briefing Reports. Where Verdict data is not available or is considered not to appropriately reflect how a store trades in practice, we have applied professional judgement in the manner set out in the notes to Table 5 of Appendix 7

[36] Net sales areas have generally been sourced from the Storepoint database of food retailers where available. Where such data is not available, we have applied professional judgement in the manner set out in the notes to Table 5 of Appendix 7

benchmark turnover of £30.75m, but turns over an estimated £40.30m of convenience goods turnover.

7.15 By way of contrast, the convenience goods turnover of the Sainsbury's store at Melton Road in Zone 9 and the Tesco Extra store at Bradgate Mall in Zone 10 respectively trade £21.78m and £12.30 less than their respective benchmark turnovers of £45.43m and £66.29m.

7.16 The individual performance of each of the main convenience goods facilities is identified at Table 5 of Appendix 7.

7.17 In order to appraise the need for additional convenience goods retail floorspace, it is necessary to consider how the performance of stores will be affected by future growth in expenditure. Accordingly, Table 7.1 also sets out the anticipated increases in expenditure which will be available to the City's convenience goods retail facilities, assuming that the current market share of 39.4% is maintained. It is also assumed that the turnover of existing floorspace will improve through improvements in floorspace efficiency as set out in Experian Retail Planner Briefing Note 12.1. Following this exercise, we then consider the effect extant planning commitments will have in addressing any identified convenience goods shopping needs under each of the growth scenarios.

7.18 Table 7.1 indicates that, after taking into consideration future increase in both population and expenditure, a convenience goods expenditure surplus of £25.00m is identified at 2015. By 2020, after increases in population and expenditure are considered against changes in floorspace productivity[37], we estimate that there will be a greater expenditure surplus of £56.20m. By 2025, we estimate that there will be an even larger surplus of £88.22m, increasing thereafter to £117.40m at 2030 and to £123.36m at 2031.

[37] Account has been made for the turnover efficiency of existing convenience goods floorspace to change (on the basis that operators have historically been able to make their existing floorspace more productive over time) in accordance with the projections set out in Table 4a of the Addendum to Experian Retail Planner Briefing Note 12.1 (these being -0.4% at 2016, -0.2% per annum between 2017 and 2021, and +0.1% between 2022 and 2031)

Table 7.1: Quantitative Need for Convenience Goods Floorspace in Leicester Administrative Area

Year	Benchmark Turnover (£m)[1]	Derived Turnover (£m)[2]	Surplus Expenditure (£m)
2015	467.35	492.35	25.00
2020	461.77	517.96	56.20
2025	462.69	550.91	88.22
2030	465.01	582.41	117.40
2031	465.47	588.83	123.36

Source: Table 6a of Appendix 7
[1] Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of the Addendum to Experian Retail Planner 12.1 (October 2014)
[2] Assumes constant market share of Study Area expenditure (39.4%) claimed by facilities in Leicester administrative area
2013 Prices

7.19 We estimate that extant retail planning permissions[38] would, if implemented, provide an estimated 4,503 sq.m of convenience goods sales floorspace across the Leicester administrative area. As set out at Table 7.2, we estimate that these commitments would have a combined turnover of £59.39m if they were operational at base year 2015. Notable convenience goods retail commitments are identified at:

- **Piccadilly Cinema, Green Lane Road** (planning permission reference 20141630), which provides for the change of use of the existing building to retail use;
- **Vaughan Way** (planning permission reference 20141404), which provides for a small foodstore alongside comparison goods floorspace;
- **217 to 219 Fosse Road North** (planning permission reference 20140826), which provides for a Lidl foodstore;
- **Former Bowerbridge Works, St Augustines Road** (planning permission reference 20131728), which provides for a mixed-use development including residential, hotel, leisure and retail uses (including convenience goods);
- **Ashton Green at Leicester Road** (planning application reference 20131597, which benefits from a resolution to approve subject to section 278 legal agreement), which provides for mixed-use development including a foodstore of 1,500 sq.m gross;
- **Melton Road** (planning permission reference 20131424), which provides for a convenience goods unit adjacent to a petrol filling station (and which has now been implemented);

[38] As reported by Leicester City Council in its email to WYG of February 2015. The resolution to grant planning permission subject to section 278 agreement at Ashton Green forms part of Leicester's City Council's schedule of commitments and has been included on this basis

- **Former Sainsbury's site, Belgrave Road** (planning permission reference 20120415), which provides for the demolition of the Sainsbury's foodstore (which has now been completed) and the erection of 10 retail units;
- **2 to 2a Upperton Road** (planning permission reference 20120701), which provides for a mixed-use scheme including commercial space and a convenience goods store; and
- **Former Corah Works** (planning permission reference 20081362), which provides for a mixed-use development including retail (including food superstore), leisure, residential, offices and so on.

Table 7.2: Extant Convenience Commitments within the Leicester Administrative Area

Location	Planning Application Reference	Proposal	Net Conv Sales (sq.m)	Conv Sales Density (£ per sq.m)	Estimated T/O at 2015 (£m)	Status
Green Lane Road, Piccadilly Cinema	20141630	Change of use to shops	100	5,000	0.50	Extant permission
Vaughan Way	20141404	Mixed-use development including foodstore and non-food retail outlet	260	13,018	3.38	Extant permission
217 to 219 Fosse Park	20140826	Lidl foodstore together with associated works	957	4,124	3.95	Extant permission
St Augustines Road, Former Bowbridge Works	20131728	Mixed-use development including residential, hotel, retail and leisure	196	5,000	0.98	Extant permission
Ashton Green at Leicester Road	20131597	Mixed-use development including retail	945	10,800	10.21	Resolution to approve subject to s.278
Melton, HKS Sandringham Services	20131424	PFS with retail unit	200	13,018	2.60	Extant permission
Belgrave Road, Former Sainsbury's Site	20120415	Demolition of existing foodstore and PFS and erection of ten retail units	871	7,000	6.10	Extant permission
2 to 2a Upperton Road	20121701	Mixed-use scheme including flexible commercial space and convenience store	877	6,363	5.58	Extant permission
Former Corah Works, Burleys Way	20081362	Mixed-use scheme including retail, leisure, residential, officer, etc	2,005	13,018	26.10	Extant permission
Total			**6,410**		**59.39**	

Source: Table 6d of Appendix 7
2013 Prices

7.20 It should be noted that only commitments providing a net sales floorspace of 200 sq.m or greater have been included in our assessment; it is considered that proposals of a lesser scale are unlikely to have a tangible effect on shopping patterns.

7.21 Full details of the assumptions made in estimating the turnover of commitments are provided in the notes which accompany Table 6d of Appendix 7. The estimated turnover of £59.39m which would be claimed by convenience goods commitments acts to extinguish the expenditure surplus which otherwise exists to support additional convenience goods retail floorspace at 2015. After account is taken of commitments, an expenditure deficit is still apparent at 2020, prior to a residual of £29.42m being identified at 2025, increasing to £58.31m at 2030, and to £64.20m at 2031. The surplus equates to a convenience goods floorspace requirement of between 2,300 sq.m and 4,200 sq.m at 2025 (depending on format and operator), increasing to between 5,000 sq.m and 9,200 sq.m at 2031. The requirement in respect of additional convenience goods floorspace is set out below at Table 7.3.

Table 7.3: Quantitative Need for Convenience Goods Floorspace in Leicester Administrative Area After Account is Made for Commitments

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus (£m)	Commitments (£m)	Residual (£m)	Min[1]*	Max[2]*
2015	25.00	59.39	-34.40	-2,600	-4,900
2020	56.20	58.69	-2.49	-200	-400
2025	88.22	58.80	29.42	2,300	4,200
2030	117.40	59.10	58.31	4,500	8,400
2031	123.36	59.16	64.20	5,000	9,200

Source: Table 6c of Appendix 7
[1] Average sales density assumed to be £13,018 per sq.m at 2015 (based on the average sales density of the leading four supermarket operators as identified by Verdict 2014)
[2] Average sales density assumed to be £7,000 per sq.m at 2015 (based on the average sales density of discount food retailers)
2013 Prices

Capacity for Future Convenience Goods Floorspace in Blaby

7.22 We have also undertaken the exercise set out above for the Blaby administrative area. Once again, in considering the performance of existing retailers, we have made allowance where appropriate for a limited degree of inflow from outside the Study Area. Our detailed assumptions in this regard are set out at Table 5 of Appendix 7, but we have assumed that larger convenience stores will derive 2.5% to 5.0% of their turnover from outside the Study Area.

7.23 Our assessment for Blaby identifies that the expected benchmark turnover of existing convenience goods provision in the administrative area is £220.21m per annum at 2015, which is £16.14m more than the identified survey-derived turnover of £204.07m. This suggests that, taken cumulatively, existing convenience goods provision in the Blaby administrative area is slightly ‘undertrading’ when compared to its expected turnover. Accordingly, it would appear that, in quantitative terms, the existing provision is broadly appropriate to meet existing needs.

7.24 Notwithstanding this, there are again instances where specific facilities trade very strongly or relatively poorly. Once more, the Aldi stores trade particularly well: the Aldi at Welford Road in Zone 4 has an estimated convenience goods benchmark turnover of £5.78m, but turns over an estimated £26.16m of convenience goods expenditure; the Aldi at Meridian Way in Zone 16, has an estimated convenience goods benchmark turnover of £5.34m, but turns over an estimated £16.72m of convenience goods expenditure.

7.25 Lesser performing stores (relative to benchmark level) include the Co-operative Foodstore at Station Road in Zone 15 (which has an estimated convenience goods benchmark turnover of £23.61m, but turns over an estimated £11.82m) and the Sainsbury's at Grove Farm Triangle in Zone 16 (which has an estimated convenience goods benchmark turnover of £64.81m, but turns over an estimated £53.54m). It should be noted that the Sainsbury's store secures a very substantial amount of custom, such that its convenience goods turnover is the fourth highest of any store within Leicester or Blaby (behind the Tesco Extra at Maidenhead Avenue in Zone 8, the Asda at Narborough Road in Zone 12 and the Tesco Extra at Bradgate Mall in Zone 10).

7.26 In order to appraise the need for additional convenience goods retail floorspace, we again consider how the performance of stores will be affected by future growth in expenditure. Table 7.4 sets out the anticipated increases in expenditure which will be available to the Borough's convenience goods retail facilities, assuming that the current market share of 16.4% is maintained. It is again assumed that the turnover of existing floorspace will improve through improvements in floorspace efficiency as set out in Experian Retail Planner Briefing Note 12.1.

7.27 Table 7.4 indicates that, after taking into consideration future increase in both population and expenditure, a convenience goods expenditure deficit of £16.14m is identified at 2015. By 2020, after increases in population and expenditure are considered against changes in floorspace productivity, we estimate that there will be a reduced expenditure deficit of £2.89m. By 2025, we estimate that a modest expenditure surplus of £10.33m will arise, increasing thereafter to £22.30m at 2030 and to £24.74m at 2031.

Table 7.4: Quantitative Need for Convenience Goods Floorspace in Blaby Administrative Area

Year	Benchmark Turnover (£m)[1]	Derived Turnover (£m)[2]	Surplus Expenditure (£m)
2015	220.21	204.07	-16.14
2020	217.58	214.69	-2.89
2025	218.01	228.35	10.33
2030	219.10	241.40	22.30
2031	219.32	244.06	24.74

Source: Table 6e of Appendix 7
[1] Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of the Addendum to Experian Retail Planner 12.1 (October 2014)
[2] Assumes constant market share of Study Area expenditure (16.4%) claimed by facilities in Blaby administrative area
2013 Prices

7.28 We estimate that extant retail planning permissions[39] would, if implemented, provide an estimated 2,427 sq.m of convenience goods sales floorspace across the Borough. As set out at Table 7.5, we estimate that these commitments would have a turnover of £28.27m if they were operational at base year 2015. Notable convenience goods retail development is proposed in the form of consented development at:

- **Lubbesthorpe Sustainable Urban Extension** (planning permission reference 20141630), which provides for a 3,000 sq.m gross foodstore as part of a district centre to serve the new residential population;
- **Glenfield Park** (planning permission reference 10/0118/1/OX as varied by permission reference 12/0997/1/VY), which provides for a maximum of 1,400 of commercial floorspace (split between Classes A1 to A5) as part of a mixed-use development;
- **Hinckley Road** (planning permission reference 12/0927/1/PX), which provides for a Tesco Express convenience store; and
- **Land at Warwick Road and Cambridge Road** (planning permission reference 14/0577/1/PX), which provides for a residential apartment scheme including a small Co-operative Food store at ground floor level.

7.29 Once more, we have considered only commitments providing a net sales floorspace of 200 sq.m or greater as proposals of a lesser scale are unlikely to have a tangible effect on shopping patterns.

[39] As reported by Blaby District Council in its email to WYG of September 2014

Table 7.5: Extant Convenience Commitments within the Blaby Administrative Area

Location	Planning Application Reference	Proposal	Net Conv Sales (sq.m)	Conv Sales Density (£ per sq.m)	Estimated T/O at 2015 (£m)	Status
Lubbesthorpe Sustainable Urban Extension	11/0100/1/OX	4,250 dwellings with district centre	1,600	13,018	20.83	Extant permission
Glenfield Park	10/0118/1/OX (as varied by 12/0997/1/VY)	Maximum of 1,400 sq.m split between Classes A1 to A5	327	7,000	2.29	Extant permission
164 Hinckley Road, Leicester Forest East	12/0927/1/PX	Tesco Express	390	12,099	3.30	Extant permission
Land at Warwick Road and Cambridge Road, Leicestershire	14/0577/1/PX	Detached building comprising residential apartments and Co-op Food at ground floor	324	8,146	1.85	Extant permission
Total			**2,427**		**28.27**	

Source: Table 6h of Appendix 7
2013 Prices

7.30 Full details of the assumptions made in estimating the turnover of commitments are provided in the notes which accompany Table 6h of Appendix 7. The estimated turnover of £28.27m which would be claimed by convenience goods commitments creates a further deficit in terms of the expenditure available to support additional convenience goods retail floorspace at 2015. Accordingly, as set out below at Table 7.6, we identify a convenience goods expenditure deficit of £44.40 at 2015, which is forecast to reduce to a deficit of £3.42m at 2031.

Table 7.6: Quantitative Need for Convenience Goods Floorspace in Blaby Administrative Area After Account is Made for Commitments

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus (£m)	Commitments (£m)	Residual (£m)	Min[1*]	Max[2*]
2015	-16.14	28.27	-44.40	-3,400	-6,300
2020	-2.89	27.93	-30.82	-2,400	-4,500
2025	10.33	27.99	-17.65	-1,400	-2,500
2030	22.30	28.13	-5.83	-400	-800
2031	24.74	28.15	-3.42	-300	-500

Source: Table 6c of Appendix 7
[1] Average sales density assumed to be £13,018 per sq.m at 2015 (based on the average sales density of the leading four supermarket operators as identified by Verdict 2014)
[2] Average sales density assumed to be £7,000 per sq.m at 2015 (based on the average sales density of discount food retailers)
2013 Prices

7.31 Accordingly, based on the retention of Blaby's existing convenience goods market share, we do not find there to be any requirement for additional convenience goods floorspace over the period to 2031.

Capacity for Future Comparison Goods Floorspace in Leicester – Based on Continuation of Current Market Share

7.32 Turning to comparison goods capacity, it is first important to note that our methodology deviates from that which has been deployed in respect of convenience goods for two principal reasons. Firstly, it can be extremely difficult to attribute an appropriate benchmark turnover to existing comparison goods provision. Secondly, there tends to be greater disparity between the trading performance of apparently similar comparison goods provision depending on its location, the character of the area and the nature of the catchment. As a consequence, we adopt the approach with comparison goods floorspace that it is trading 'at equilibrium' (i.e. our survey derived turnover estimate effectively acts as benchmark) at 2015.

7.33 We assume that there is therefore a nil quantitative need for any additional floorspace across the Leicester administrative area at 2015. For the purpose of our initial quantitative modelling exercise, it has also been assumed that the future performance of Leicester's comparison goods facilities will be commensurate with their current market share. Our assessment also takes into consideration the fact that Leicester city centre, its retail parks and standalone large format retail units will attract some limited custom from outside the Study Area. Through consideration of the in-street Leicester city centre shopper survey, which noted the home postcode of respondents, we have identified that around 7.5% of visitors to the city centre live outside the Study Area. Accordingly, we have assumed that 7.5% of the overall turnover of comparison goods retailers in the city centre and the proximate St George's Retail Park will derive from outside the Study Area. Given the size of the Study Area, we have assumed that other comparison goods retailers elsewhere in the Leicester administrative area will not benefit from any discernible level of inflow. The inflow allowance has the net effect of increasing Leicester's identified comparison goods survey derived turnover from £839.79m to £893.48m at 2015 (inflow therefore representing 6.0% of total turnover).

7.34 The £839.79m of comparison goods expenditure claimed from inside the Study Area at 2015 equates to a market share of 47.8% of all comparison goods expenditure generated by residents of the Study Area. Our initial assessment 'rolls forward' this market share to examine the likely level of comparison goods floorspace required to maintain the role and function of Leicester's retail facilities going forward.

7.35 By 'rolling forward' this market share and making provision for inflow deriving from visitors to the Study Area, we estimate that facilities in the Leicester administrative area will attract £893.48m of comparison goods expenditure at 2015, increasing to £1,038.57m at 2020, to £1,260.02m at 2025, to £1,529.59m at 2030 and to £1,591.02m at 2031.

7.36 Given the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2020 there will be an expenditure surplus of £49.19m to support additional comparison goods floorspace within the Leicester administrative area. As set out in Table 7.7, this surplus is forecast to increase sharply to £159.07m at 2025, to £302.10m at 2030 and then to £336.52m at 2031. Account has been made for the turnover efficiency of existing comparison goods floorspace to increase (on the basis that operators are generally able to make their existing floorspace more productive over time)[40].

Table 7.7: Quantitative Need for Comparison Goods Floorspace in Leicester Administrative Area

Year	Benchmark Turnover (£m)[1]	Available Expenditure (£m)[2]	Surplus Expenditure (£m)
2015	893.48	893.48	0.00
2020	989.38	1,038.57	49.19
2025	1,100.94	1,260.02	159.07
2030	1,227.49	1,529.59	302.10
2031	1,254.50	1,591.02	336.52

Source: Table 26A of Appendix 7
[1] Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4b of the Addendum to Experian Retail Planner 12.1 (October 2014)
[2] Assumes constant market share (47.8%) claimed by facilities within the Study Area
2013 Prices

7.37 Once again, this initial analysis does not take into account existing commitments, which we set out in Table 7.8 and which we estimate would have a combined turnover of £32.45m if it were to be assumed that each was operational at 2015. Most of the commitments identified at paragraph 7.20 also have a comparison goods element and are represented in the table below. The single additional commitment which provides solely comparison goods floorspace is planning permission reference 20140298 which provides for the extension of Units 6 and 7 at St Georges Retail Park.

[40] Such increases have been derived from the projections set out in Table 4b of the Addendum to Experian Retail Planner Briefing Note 12.1 (these being +2.3% at 2016, +2.0% per annum between 2017 and 2021, and +2.2% between 2022 and 2031)

Table 7.8: Extant Comparison Commitments within the Leicester Administrative Area

Location	Planning Application Reference	Proposal	Net Comp Sales (sq.m)	Comp Sales Density (£ per sq.m)	Estimated T/O at 2015 (£m)	Status
Green Lane Road, Piccadilly Cinema	20141630	Change of use to shops	100	3,000	0.30	Extant permission
Vaughan Way	20141404	Mixed-use development including foodstore and non-food retail outlet	2,045	-	8.19	Extant permission
217 to 219 Fosse Road North	20140826	Lidl foodstore together with associated works	106	4,124	0.44	Extant permission
St Georges Retail Park	20140298	Extension to Unit 6 and 7	895	895	2.69	Extant permission
St Augustines Road, Former Bowbridge Works	20131728	Mixed-use development including residential, hotel, retail and leisure	196	3,000	0.59	Extant permission
Ashton Green at Leicester Road	20131597	Mixed-use development including retail	525	3,000	1.58	Resolution to approve subject to s.278
Ashton Green at Leicester Road (comparison goods element of foodstore)	20131597	Mixed-use development including retail	105	8,694	0.91	Resolution to approve subject to s.278
Belgrave Road, Former Sainsbury's Site	20120415	Demolition of existing foodstore and PFS and erection of ten retail units	870	3,000	2.61	Extant permission
2 to 2a Upperton Road	20121701	Mixed-use scheme including flexible commercial space and convenience store	97	6,363	0.62	Extant permission
Former Corah Works, Burleys Way	20081362	Mixed-use scheme including retail, leisure, residential, officer, etc	326	3,000	0.98	Extant permission
Former Corah Works, Burleys Way (comparison goods element of foodstore)	20081362	Mixed-use scheme including retail, leisure, residential, officer, etc	1,374	9,860	13.55	Extant permission
Total			**6,640**		**32.45**	

Source: Table 26d of Appendix 7
2013 Prices

7.38 The estimated £32.45m turnover of comparison goods commitments is reasonably substantial and extinguishes much of the need for additional comparison goods floorspace in the Leicester administrative area in the period to 2020. A limited positive residual of £13.26m is identified at 2020 increasing to £119.09m at 2025, to £257.52m at 2030, and to £290.97m at 2031. The surplus equates to a comparison goods floorspace requirement of between 2,000 sq.m and 4,000 sq.m at 2020, increasing to between 34,500 sq.m and 69,100 sq.m at 2031. The minimum figure is based on the identified need being met through the delivery of high street floorspace (which we estimate could achieve a sales density in the order of £6,000 per sq.m) and the maximum figure relates to need being met by bulky goods retailers or in smaller town centres, which both generally accommodate operators which achieve lesser sales densities (which we estimate could achieve a sales density in the order of £3,000 per sq.m). The requirement in respect of additional comparison goods floorspace is set out below at Table 7.9.

Table 7.9: Quantitative Need for Comparison Goods Floorspace in Leicester Administrative Area After Account is Made for Commitments

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min[1*]	Max[2*]
2015	0.00	32.45	-32.45	-5,400	-10,800
2020	49.19	35.93	13.26	2,000	4,000
2025	159.07	39.98	119.09	16,100	32,200
2030	302.10	44.58	257.52	31,200	62,500
2031	336.52	45.56	290.97	34,500	69,100

Source: Table 26c of Appendix 7
[1] Average sales density assumed to be £6,000 per sq.m at 2015, which we consider to be towards the higher end of what could be achieved 'in centre' in the Study Area
[2] Average sales density assumed to be £3,000 per sq.m at 2015, which we consider to be towards the lower end of what could be achieved in the Study Area
2013 Prices

Capacity for Future Comparison Goods Floorspace in Blaby – Based on Continuation of Current Market Share

7.39 In assessing the quantitative need for additional comparison goods floorspace in Blaby, we once again adopt the position that existing facilities are trading 'in equilibrium' and that there is therefore a nil quantitative need for any additional floorspace across the Blaby administrative area at 2015. It has also again been assumed for this initial assessment that the future performance of Blaby's comparison goods facilities will be commensurate with their current market share.

7.40 Through consideration of the Leicester city centre in-street shopper survey, which identified the proportion of respondents from outside the Study Area that shop at Fosse Park, we estimate that around 10% of the turnover of Fosse Park and the Grove Farm Triangle derives from outside of the Study Area. Given the size of the Study Area and the relatively local function of other retail facilities in Blaby, we have assumed that other comparison goods retailers in the District will not benefit from any discernible level of inflow. The inflow allowance has the net effect of increasing Blaby's identified comparison goods survey derived turnover from £433.34m to £477.4m at 2015 (inflow therefore representing 9.2% of total turnover).

7.41 The £433.34m of comparison goods expenditure claimed from inside the Study Area at 2015 equates to a market share of 24.7% of all comparison goods expenditure generated by residents of the Study Area. Our assessment 'rolls forward' this market share to examine the likely level of comparison goods floorspace required to maintain the role and function of Blaby's retail facilities going forward.

7.42 By 'rolling forward' this market share and making provision for inflow deriving from visitors to the Study Area, we estimate that facilities in the Blaby administrative area will attract £477.45m of comparison goods expenditure at 2015, increasing to £554.98m at 2020, to £673.31m at 2025, to £817.36m at 2030 and to £850.19m at 2031.

7.43 Given the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2020 there will be an expenditure surplus of £26.29m to support additional comparison goods floorspace within the Blaby administrative area. As set out in Table 7.10, this surplus is forecast to increase to £85.00m at 2025, to £161.43m at 2030 and then to £179.83m at 2031. Account has again been made for the turnover efficiency of existing comparison goods floorspace to increase.

Table 7.10: Quantitative Need for Comparison Goods Floorspace in Blaby Administrative Area

Year	Benchmark Turnover (£m)[1]	Derived Turnover (£m)[2]	Surplus Expenditure (£m)
2015	477.45	477.45	0.00
2020	528.69	554.98	26.29
2025	588.31	673.31	85.00
2030	655.93	817.36	161.43
2031	670.36	850.19	179.83

Source: Table 26f of Appendix 7
[1] Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of the Addendum to Experian Retail Planner 12.1 (October 2014)
[2] Assumes constant market share (24.7%) claimed by facilities within the Study Area
2013 Prices

7.44 We set out the revised position once extant commitments are taken into consideration below at Table 7.11. We estimate that such commitments will have a combined turnover of £12.29m if it were to be assumed that each was operational at 2015. Most of the commitments identified at paragraph 7.28 also have a comparison goods element and are represented in the table below. The single additional commitments which provide solely comparison goods floorspace are planning permissions reference

14/0129/1/PX and 14/0130/1/PX which provide for the installation of mezzanine floorspace at Fosse Park South.

Table 7.11: Extant Comparison Commitments within the Blaby Administrative Area

Location	Planning Application Reference	Proposal	Net Comp Sales (sq.m)	Comp Sales Density (£ per sq.m)	Estimated T/O at 2015 (£m)	Status
Fosse Park South	14/0129/1/PX and 14/0130/1/PX	Installation of mezzanine floorspace	1,744	-	3.52	Extant permission
Lubbesthorpe Sustainable Urban Extension (comparison goods element of foodstore)	11/0100/1/OX	4,250 dwellings with district centre	400	9,860	3.94	Extant permission
Lubbesthorpe Sustainable Urban Extension	11/0100/1/OX	4,250 dwellings with district centre	1,281	3,000	3.84	Extant permission
Glenfield Park	10/0118/1/OX (as varied by 12/0997/1/VY)	Maximum of 1,400 sq.m split between Classes A1 to A5	327	3,000	0.98	Extant permission
Total			**2,427**		**12.29**	

Source: Table 26h of Appendix 7
2013 Prices

7.45 The estimated £12.29m turnover of comparison goods commitments extinguishes almost half of the need for additional comparison goods floorspace in the Blaby administrative area in the period to 2020. Once again, a limited positive residual of £12.68m is identified at 2020 increasing to £69.86m at 2025, to £145.55m at 2030, and to £162.57m at 2031. The surplus is set out below at Table 7.12 and equates to a comparison goods floorspace requirement of between 1,900 sq.m and 3,800 sq.m at 2020, increasing to between 19,300 sq.m and 38,600 sq.m at 2031.

Table 7.12: Quantitative Need for Comparison Goods Floorspace in Blaby Administrative Area After Account is Made for Commitments

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min[1*]	Max[2*]
2015	0.00	12.29	-12.29	-2,000	-4,100
2020	26.29	13.61	12.68	1,900	3,800
2025	85.00	15.14	69.86	9,400	18,900
2030	161.43	16.88	144.55	17,500	35,100
2031	179.83	17.25	162.57	19,300	38,600

Source: Table 26g of Appendix 7
[1] Average sales density assumed to be £6,000 per sq.m at 2015, which we consider to be towards the higher end of what could be achieved 'in centre' in the Study Area
[2] Average sales density assumed to be £3,000 per sq.m at 2015, which we consider to be towards the lower end of what could be achieved in the Study Area
2013 Prices

Capacity for Future Comparison Goods Floorspace in Leicester and Blaby – Based on the Application of 'Town Centre First' Principles

7.46 In considering the above capacity assessment, it should be noted that the maintenance of Leicester and Blaby administrative areas' current market share effectively provides for the future growth of Fosse Park, as this very clearly represents the principal comparison goods offer in Blaby District. However, in practice, Leicester city centre and Blaby serve similar catchments and, in accordance with local and national retail and town centre planning policy, we believe that it is pertinent to consider a scenario whereby additional floorspace is brought forward at Leicester city centre to meet the needs and future growth which could otherwise be directed towards Fosse Park.

7.47 In undertaking this exercise, we have isolated the expenditure which is currently claimed by Fosse Park. We have then applied an allowance to account for changes in the sales efficiency of existing floorspace, which effectively provides for existing retailers at Fosse Park to increase their performance in line with general trading expectations.

7.48 It is evident from the below Table 7.13 that an estimated expenditure surplus of £24.28m at 2020, increasing to £166.11m at 2031, would arise at Fosse Park based on its current market share and allowing for existing operators to increase their sales densities. In order to maintain its market position and remain attractive to shoppers, Fosse Park would likely need to expand to cater for the identified surplus.

Table 7.13: Quantitative Need for Comparison Goods Floorspace at Fosse Park Based on its Current Market Share

Year	Benchmark Turnover (£m)[1]	Derived Turnover (£m)[2]	Surplus Expenditure (£m)
2015	441.02	441.02	0.00
2020	488.35	512.63	24.28
2025	543.42	621.94	78.52
2030	605.89	755.00	149.12
2031	619.22	785.32	166.11

Source: Table 27a of Appendix 7
[1] Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of the Addendum to Experian Retail Planner 12.1 (October 2014)
[2] Assumes constant market share (22.6%) claimed by facilities at Fosse Park
2013 Prices

7.49 Table 7.14 indicates that, after account is made of consented mezzanine floorspace at Fosse Park South, the identified expenditure residual equates to a need for at least 3,100 sq.m of net comparison goods floorspace at 2020, increasing to at least 19,100 sq.m at 2031. It should be noted that these floorspace requirements are based on an assumed sales density of £6,000 per sq.m at 2015, which is considered to correspond to that which can be achieved in Leicester city centre (and is not necessarily representative of sales densities achieved in Fosse Park itself).

Table 7.14: Quantitative Need for Comparison Goods Floorspace at Fosse Park After Account is Made for Commitments

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min[1*]	Max[2*]
2015	0.00	3.52	-3.52	-600	-1,200
2020	24.28	3.90	20.38	3,100	6,100
2025	78.52	4.34	74.18	10,000	20,100
2030	149.12	4.84	144.28	17,500	35,000
2031	166.11	4.94	161.16	19,100	38,300

Source: Table 27b of Appendix 7
[1] Average sales density assumed to be £6,000 per sq.m at 2015, which we consider to be towards the higher end of what could be achieved 'in centre' in the Study Area
[2] Average sales density assumed to be £3,000 per sq.m at 2015, which we consider to be towards the lower end of what could be achieved in the Study Area
2013 Prices

7.50 However, simply attributing this level of future growth to Fosse Park fails to acknowledge that such needs could be met in Leicester city centre in accordance with the requirements of the sequential test as set out at paragraph 24 of the NPPF. We believe that it is evident from the results of the household survey and health check that Leicester city centre and Fosse Park are the two comparable retail destinations which accommodate a range of large format high street multiples. Accordingly, we do not consider it likely that any substantial element of the future growth which would be directed to Fosse Park under a constant market share scenario could be met inside the Study Area at any centre other than Leicester city centre.

7.51 As a consequence, we believe that consideration should be given as to whether appropriate sites exist in Leicester to meet the expenditure surplus which could otherwise support the additional growth of Fosse Park.

7.52 On this basis, we set out below the floorspace requirements for both Leicester and Blaby administrative areas should the Fosse Park expenditure surplus be 'reassigned' to Leicester city centre.

7.53 Table 7.15 indicates that, after the reapportioning of the Fosse Park surplus, the Leicester administrative area would benefit from an expenditure residual of £33.65m at 2020, increasing to £193.27m at 2025, to £401.80m at 2030, and to £452.13m at 2031. The surplus equates to a comparison goods floorspace requirement of between 5,100 sq.m and 10,100 sq.m at 2020, increasing to between 53,700 sq.m and 107,300 sq.m at 2031. It is assumed that the large proportion of this floorspace requirement should be brought forward in the line with the town centre first principle under paragraph 24 of the NPPF.

Table 7.15: Quantitative Need for Comparison Goods Floorspace in Leicester Administrative Area After Account is Made for Commitments, Based on Redistribution of Future Fosse Park Surplus Expenditure

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Leicester Surplus After Commitments	Fosse Park Surplus After Commitments	Residual	Min[1*]	Max[2*]
2015	-32.45	-3.52	-35.97	-6,000	-12,000
2020	13.26	20.38	33.65	5,100	10,100
2025	119.09	74.18	193.27	26,100	52,300
2030	257.52	144.28	401.80	48,200	97,500
2031	290.97	161.16	452.13	53,700	107,300

Source: Table 26c of Appendix 7
[1] Average sales density assumed to be £6,000 per sq.m at 2015, which we consider to be towards the higher end of what could be achieved 'in centre' in the Study Area
[2] Average sales density assumed to be £3,000 per sq.m at 2015, which we consider to be towards the lower end of what could be achieved in the Study Area
2013 Prices

7.54 Table 7.16 indicates that, after the reapportioning of the Fosse Park surplus, the Blaby administrative area would have a negative expenditure residual in the period to 2025. At 2030 a modest estimated expenditure surplus of £0.27m is apparent, increasing to £1.41m at 2031. The surplus equates to a limited comparison goods floorspace requirement of between 200 sq.m and 300 sq.m at 2031.

Table 7.16: Quantitative Need for Comparison Goods Floorspace in Blaby Administrative Area After Account is Made for Commitments, Based on Redistribution of Future Fosse Park Surplus Expenditure

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Blaby Surplus After Commitments	Fosse Park Surplus After Commitments	Residual	Min[1*]	Max[2*]
2015	-12.29	-3.52	-8.77	-1,500	-2,900
2020	12.68	20.38	-7.70	-1,200	-2,300
2025	69.86	74.18	-4.32	-600	-1,200
2030	144.55	144.28	0.27	0	100
2031	162.57	161.16	1.41	200	300

Source: Table 26c of Appendix 7
[1] Average sales density assumed to be £6,000 per sq.m at 2015, which we consider to be towards the higher end of what could be achieved 'in centre' in the Study Area
[2] Average sales density assumed to be £3,000 per sq.m at 2015, which we consider to be towards the lower end of what could be achieved in the Study Area
2013 Prices

Qualitative Need in Leicester and Blaby

Leicester

7.55 As we set out at paragraph 7.13 of this section, convenience goods retail facilities in the Leicester administrative area turn over £492.35m at 2015, which is greater than their expected benchmark turnover of £467.35m. However, in examining the performance of specific stores, it is evident that smaller, discount supermarkets (operated by the likes of Aldi and Lidl) are generally performing better in Leicester than superstores[41] operated by the 'main four'.

7.56 In this regard, Table 7.17 below provides an overview of the current performance of existing foodstores (which provide a net convenience goods sales area of 690 sq.m or more[42]) with reference

[41] Defined as having a net sales area of more than 2,500 sq.m
[42] Which equates to the net sales area of the smallest discount supermarket operated by either Aldi or Lidl, this being the Aldi at Meridian Way in Zone 16

to their expected trading performance. The six food superstores collectively turn over £217.79m, which is slightly less than their anticipated benchmark turnover of £221.15m.

7.57 The food superstore which performs most strongly is the Tesco Extra store at Maidenwell Avenue in Hamilton, which has an estimated convenience goods benchmark turnover of £46.10m and an estimated survey derived turnover of £71.07m (it is therefore effectively overtrading by £24.97m). By way of contrast, the Sainsbury's at Melton Road has a convenience goods benchmark turnover of £45.43m and an estimated survey derived turnover of £23.66m (it is undertrading by £21.78m), and the Tesco Extra at Bradgate Mall has a convenience goods benchmark turnover of £66.29m and an estimated survey derived turnover of £53.99m (it is undertrading by £12.30m).

7.58 Whilst the trading performance of the Sainsbury's at Melton Road is relatively poor (its turnover is little more than half what we would expect), the performances of the Tesco Extra at Hamilton and the Tesco Extra at Bradgate Mall are not considered to be particularly unusual. Benchmark performances are clearly representative of a company's average performance and numerous stores will undertrade or overtrade in relation to benchmark level without significant issues arising.

7.59 Notwithstanding this, when taken as a whole, the performance of the big superstores is such that there does not appear to be any pressing quantitative requirement for another such store in the Leicester administrative area. This is consistent with the current strategy of the 'main four' operators who are currently very circumspect in respect of their appetite to bring forward additional large superstores.

7.60 We do note, however, that the western part of Leicester is less well provided for in terms of large-scale main food shopping destinations than other parts of the administrative area. Appendix 8 identifies the location of the principal food supermarkets[43] and superstores in the Leicester and Blaby administrative areas. The relative deficiency to the west of the administrative area is evident on the plan, particularly as the Co-operative Food store at Station Road in Glenfield is a relatively small superstore and not one which makes a significant contribution to meeting the main food shopping needs of Leicester's residents (it attracts only 1.3% of main food shopping trips which originate in the most proximate Study Area zone in the Leicester administrative area, this being Zone 12).

[43] For this purpose, we have identified on the plan all supermarkets above the scale of the smallest Aldi and Lidl formats (the smallest foodstore identified is the Aldi at Meridian Way which we believe has a net sales area of around 690 sq.m)

7.61 As a consequence, it is accepted that, subject to the acceptability of the impacts which would arise from any such development, there may be qualitative benefits associated with providing improved main food retail provision in the western part of Leicester. Such benefits could derive from a reduced need to travel to access supermarket facilities and an improvement in the ability to meet all the needs of the community.

7.62 Whilst the plan provided at Appendix 8 also suggests that there is relatively limited large superstore provision to the east of the Leicester administrative area, it is important to note the contribution made by the Asda at Leicester Road in Oadby in this regard, which is very well located to help meet the food shopping needs of residents of the south-eastern part of Leicester. The Asda at Oadby secures 32.5% of main food shopping trips which originate within Zone 11 (which is substantially located within the Leicester administrative area) and 19.3% of main food shopping trips which originate within Zone 7 (which, in its entirety, is located within Leicester). Accordingly, we do not consider that the qualitative case for additional main food shopping facilities in the eastern part of Leicester is as compelling as it is in the western part.

Table 7.17: Performance of Convenience Goods Floorspace of Principal Foodstores in Leicester at 2015

Zone	Store	Gross Floor space (sq.m)	Estimated Net Con. Floor space (sq.m)	Sales Density (£ per sq.m)	Bench mark Turnover (£m)	Survey Derived Turnover (£m)	Over trading (£m)
	Leicester						
6.	Aldi, St George's RP	1,278	686	8,602	5.90	12.97	7.07
	Co-op, Kemble Square	1,901	955	8,146	7.78	3.38	-4.40
	M&S Foodhall, Gallowtree Gate	2,245	1,285	11,578	14.88	5.83	-9.04
	Sainsbury's, Humberstone Gate	3,252	897	12,684	11.38	19.82	8.43
8.	Tesco Extra, Maidenwell Avenue	10,466	3,810	12,099	46.10	71.07	24.97
9.	Asda, Exploration Drive	6,847	2,212	13,901	30.75	40.30	9.54
	Lidl, Gipsy Lane	1,345	801	4,124	3.30	12.77	9.46
	Lidl, Loughborough Road	1,396	729	4,124	3.01	8.27	5.26
	Sainsbury's, Melton Road	10,845	3,582	12,684	45.43	23.66	-21.78
10.	Tesco Extra, Bradgate Mall	16,307	5,479	12,099	66.26	53.99	-12.30
11.	Aldi, Aylestone Road	1,461	720	8,602	6.19	19.16	12.96
12.	Aldi, Woodgate	1,338	718	8,602	6.18	24.12	17.94
	Morrisons, Counting House Road	6,005	2,434	13,388	32.58	28.78	-3.80
	Tesco, Narborough Road RP	4,451	1,872	12,099	22.65	15.38	-7.27

Source: Table 5 of Appendix 7 (Extract providing details of foodstores with a net sales area of 690 sq.m or above, which correlates to the estimated net sales area of the smallest discount supermarket in both authority areas, this being the Aldi at Meridian Way in Blaby)
2013 Prices

7.63 We also note that all of the Aldi and Lidl stores in Leicester are overtrading significantly. As set out at Section 2 of this report, both discount operators have substantially improved their share of the national grocery market in recent years. Notwithstanding this, the performance of certain Aldi stores is particularly strong. For example, the Aldi at Woodgate overtrades by an estimated £17.94m and the Aldi at Alylestone Road overtrades by an estimated £12.96m. The very strong performance of the discount sector in Leicester suggests that it may currently be underprovided for and that Leicester City Council could expect further planning applications for such uses in the short to medium term.

7.64 Turning to comparison goods, the importance and relative dominance of Leicester city centre as a comparison goods shopping venue means that other centres in Leicester's hierarchy have a significantly more localised role and function. Given the location and relative accessibility of Leicester, this is not of itself problematic. Moreover, as we identified at Section 4 of this report, the market share of shopping trips claimed by facilities in the Leicester administrative area is generally strong and indicates that the needs of Leicester's residents are being meet within the authority area.

7.65 Accordingly, noting that Fosse Park also makes a significant contribution to the comparison goods needs of residents of the Leicester administrative area, we do not consider there to be significant qualitative deficiencies in respect of comparison goods shopping in Leicester which need to be addressed. However, as we have set out above, consideration should be given as to whether future growth which could be accommodated at Fosse Park (both in terms of additional floorspace and the relaxation of any restrictive conditions relating to goods traded), might instead be met at sites within or in proximity to Leicester city centre, in accordance with the 'town centre first' requirements of the NPPF. This will help ensure that the vitality and viability of Leicester city centre is safeguarded and that the centre remains the principal location for non-bulky comparison goods retail in the Study Area.

Blaby

7.66 As set out at paragraph 7.23 of this report, convenience goods retail facilities in the Blaby administrative area turn over £204.07m at 2015, which is £16.14m less than their expected benchmark turnover of £220.21m. This suggests that, taken cumulatively, there is no quantitative need to support additional convenience goods provision in Blaby.

7.67 However, the picture in Blaby with regard to the strong performance of the discount sector is similar to that in Leicester. Whilst we estimate that the Co-operative Food at Glenfield undertrades by £11.79m and the Sainsbury's at Grove Farm Triangle undertrades by £11.27m, the two Aldi stores at Welford Road and Meridian Way respectively overtrade by an estimated £20.39m and £11.37m.

7.68 Accordingly, it would appear that Blaby has an effective qualitative deficiency in this sector. However, in this regard, it should be noted that Aldi's existing stores are currently reasonably well located to provide for Blaby's most urbanised areas, which may limit the need for additional discount stores.

7.69 Given the proximity of main food shopping destinations to the south of the Leicester administrative area and in Oadby, we do not consider there to be a pressing qualitative need for additional main food shopping facilities in the District of the type operated by the 'main four' food retailers.

Table 7.18: Performance of Convenience Goods Floorspace of Principal Foodstores in Blaby at 2015

Zone	Store	Gross Floor space (sq.m)	Estimated Net Con. Floor space (sq.m)	Sales Density (£ per sq.m)	Bench mark Turnover (£m)	Survey Derived Turnover (£m)	Over trading (£m)
	Blaby						
4.	Aldi, Welford Road, Blaby	1,251	671	8,602	5.78	26.16	20.39
	Co-op, Dog & Gun Lane	2,342	1,177	8,146	9.59	2.21	-7.38
	Waitrose, John's Court, Blaby	1,297	583	13,080	7.62	6.11	-1.51
12.	Asda, Narborough Road	11,421	4,604	13,901	64.01	54.53	-9.47
15.	Co-op, Station Road, Glenfield	4,958	2,898	8,146	23.61	11.82	-11.79
16.	Aldi, Meridian Way	1,157	621	8,602	5.34	16.72	11.37
	M&S Foodhall, Fosse Park	1,628	932	11,578	10.79	7.13	-3.66
	Sainsbury's, Grove Farm Triangle	15,308	5,110	12,684	64.81	53.54	-11.27

Source: Table 5 of Appendix 7 (Extract providing details of foodstores with a net sales area of 690 sq.m or above, which correlates to the estimated net sales area of the smallest discount supermarket in both authority areas, this being the Aldi at Merdian Way in Leicester)
2013 Prices

7.70 Blaby's comparison goods needs are principally met by Leicester city centre and by Fosse Park, which together provide a particularly strong offer for Blaby's population. Accordingly, we do not consider there to be any significant qualitative comparison goods retail deficiency which remains to be addressed.

8.0 Commercial Leisure

8.01 Our approach to the assessment of quantitative need in the leisure market necessarily departs from our retail methodology for a number of reasons, including the fragmentation of the market and the limited availability of accurate data. However, the household survey undertaken to inform the Study asked respondents questions about their use of commercial leisure facilities and, through reference to market share, we are therefore able to form a view as how Leicester and Blaby currently meet the needs of their population in relation to the bingo, cinema, ten-pin bowling and health and leisure centre sectors. We also use national statistics in respect of the typical level of provision of specific types of facilities to assist our judgement in respect of the likely future need for additional facilities in the two administrative areas. By reference to estimated increases in the Study Area population, this 'benchmarking' exercise informs our judgement in respect of the likely future need for additional commercial leisure facilities in the Study Area.

8.02 In considering future leisure provision, it should be noted that certain types of facility are often provided in locations proximate to large centres. Accordingly, we anticipate that some of Blaby's commercial leisure needs could possibly be met within or in the vicinity of Leicester city centre. However, it could also be the case that Blaby could help meet some of Leicester's needs should sequentially appropriate sites be forthcoming in the Blaby area. The analysis that follows seeks to apportion future growth in commercial leisure provision on the basis of Leicester's and Blaby's current market share, but this should be viewed with some flexibility in respect of how opportunities that come forward 'on the ground' can appropriately contribute to meeting identified needs.

8.03 For each leisure sector, we consider the current broad patterns of existing use, before then assessing the quantitative need for additional facilities.

Bingo

8.04 The Leicester administrative area currently accommodates two permanent bingo halls, these being the Gala Bingo hall at Beaumont Way (adjacent to Beaumont Shopping Centre in Zone 10) and the Mecca Bingo hall at Aylestone Road (close to the University campus in Zone 12). Both are relatively large, purpose built facilities. The Mecca Bingo hall appears to be the most popular of the two (which may be a consequence of its more central location) as it attracts 51.3% of bingo trips which originate within the Study Area, which compares to the 33.0% market share claimed by Gala Bingo. As Table 8.1 indicates, other facilities within the Leicester and Blaby administrative area operate on a more occasional basis in social clubs and pubs. Outside of the Study Area, relatively popular bingo facilities comprise Gala Bingo at Derby and Beacon Bingo at Loughborough, which respectively account for 5.0% and 4.0% of all trips to play bingo that originate from within the Study Area.

8.05 Given that bingo halls require a relatively large population to support them, we do not consider Blaby's lack of permanent provision to be problematic and the very large market share claimed by Leicester's facilities within proximate zones suggests that there is no particular qualitative issue in respect of participants being forced to travel further afield in order to source appropriate facilities.

Table 8.1a: Study Area Market Share for Bingo Hall Visits (%)

Zone	Address	1	2	3	4	5	6	7	8
	Leicester								
7.	Blue Star Social Club, Evington Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.7%
10.	Gala Bingo, Beaumont Way	37.6%	52.5%	50.1%	50.0%	0.0%	0.0%	26.2%	8.9%
11.	Knighton & Clarendon Conservative Club	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Saffron Lane Working Mens Club, Saffron	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
12.	Mecca Bingo, Aylestone Rd	0.0%	47.4%	0.0%	50.0%	0.0%	100.0%	73.8%	80.4%
	Leicester Authority Total	37.6%	100.0%	50.1%	100.0%	0.0%	100.0%	100.0%	100.0%
	Blaby								
15.	Royal Oak, Kirby Muxloe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Blaby Authority Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other Authority Areas								
13.	Wigston	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OSA	Beacon Bingo, Loughborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Gala Bingo, Derby	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Table 8.1b: Study Area Market Share for Bingo Hall Visits (%)

Zone	Address	9	10	11	12	13	14	15	16	Total
	Leicester									
7.	Blue Star Social Club, Evington Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.21%
10.	Gala Bingo, Beaumont Way	0.0%	100%	18.1%	45.7%	0.0%	0.0%	22.2%	39.9%	33.0%
11.	Knighton & Clarendon Conservative Club	0.0%	0.0%	6.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
	Saffron Lane Working Mens Club, Saffron	0.0%	0.0%	11.6%	0.0%	7.9%	0.0%	0.0%	0.0%	1.8%
12.	Mecca Bingo, Aylestone Rd	0.0%	0.0%	57.5%	54.3%	92.1%	0.0%	55.6%	60.1%	51.3%
	Leicester Authority Total	0.0%	100%	93.6%	100%	100%	0.0%	77.8%	100%	88.0%
	Blaby									
15.	Royal Oak, Kirby Muxloe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	22.2%	0.0%	0.4%
	Blaby Authority Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	22.2%	0.0%	0.4%
	Other Authority Areas									
13.	Wigston	0.0%	0.0%	6.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
OSA	Beacon Bingo, Loughborough	0.0%	0.0%	0.0%	0.0%	0.0%	100%	0.0%	0.0%	4.0%
	Gala Bingo, Derby	100%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%

Source: Question 42 of Household Survey, Appendix 2. Includes all responses located within Study Area and those receiving more than 1.0% of total market share of trips outside Study Area

8.06 The Study Area has a total estimated population of 703,573 at 2015, increasing to 781,809 at 2031. Reports[44] indicate that there were around 400 bingo halls in the UK at 2012, which given the estimated 63.7 million population of the UK at the same year[45], suggests that each is supported by a catchment of 159,250 persons or thereabouts. Accordingly, we estimate that the Study Area could be expected to support 4.4 bingo halls at 2015, increasing to 4.9 bingo halls at 2031. Based on current market share, we would expect around 3.9 of these bingo halls to be located in the Leicester administrative area at 2015, increasing to 4.3 halls at 2031. Blaby currently does not have any specialist bingo facility (which we do not consider especially surprising given its size and relationship with Leicester) and we do not consider it likely that there will be a requirement for an additional facility in Blaby the future.

8.07 In terms of the existing provision in the Study Area, it should be noted that the two halls are relatively large, purpose built facilities and that, throughout the country, bingo halls often operate below capacity. Accordingly, whilst over the reporting period, it might be expected that there would be three

[44] Including the HM Treasury announcement titled 'Budget bingo tax to create and save hundreds of jobs and revitalise industry' of March 2014
[45] As identified by the Office for National Statistics' Population Estimates for UK, England and Wales, Scotland and Northern Ireland, Mid-2011 and Mid-2012, August 2013

or four bingo halls in the combined Leicester and Blaby administrative area, it is likely that two large halls will be able to accommodate most people's needs.

8.08 Furthermore, it should be noted that the bingo market has been significantly affected by the 2007 ban on smoking in enclosed public places, an increase in the proliferation of fixed odd gaming machines and an increase in online gambling. As a consequence of this, new bingo hall openings are few and far between and we therefore do not consider it likely that there will be any change to current provision in the Study Area in the foreseeable future. Accordingly, we do not consider it necessary for either authority to plan for additional provision in the period to 2031, but instead recommend that, should any proposals for such development be forthcoming, they are judged on their own merit in accordance with relevant town centre planning policy at the time of an application's submission.

Table 8.2: Bingo Hall Requirement in Study Area

Year	Study Area Population	Typical Population Required to Support Hall	Potential Number of Clubs Supported by Study Area	Study Area Custom Claimed by Leicester	Potential Number of Clubs Supported in Leicester	Study Area Custom Claimed by Blaby	Potential Number of Clubs Supported in Blaby
2015	703,573	159,250	4.4	88.0%	3.9	0.4%	0.0
2020	729,890	159,250	4.6	88.0%	4.0	0.4%	0.0
2025	755,671	159,250	4.7	88.0%	4.2	0.4%	0.0
2030	777,888	159,250	4.9	88.0%	4.3	0.4%	0.0
2031	781,809	159,250	4.9	88.0%	4.3	0.4%	0.0

Note: Typical population to support a bingo hall derived from the Government's estimation (set out the HM Treasury announcement titled 'Budget bingo tax to create and save hundreds of jobs and revitalise industry' of March 2014) and the Office of National Statistics UK population projection of 64.9 million persons at 2015

Cinema

8.09 There is a range of types of cinema provision in the Study Area, which includes the following cinemas:

- Odeon Cinema, Aylestone Road, Freemen's Park (within Zone 12 in the Leicester administrative area), which is a modern multiplex providing 12 screens;
- Phoenix Cinema, Midland Street, Leicester (within Zone 6 in the Leicester administrative area), which is a modern independent cinema and gallery providing two screens;
- Piccadilly Cinema, Green Lane, Leicester (within Zone 7 in the Leicester administrative area), which is accommodated within the former North Evington Working Men's Club and Institute building and which provides five screens;
- Showcase Cinema, Highcross Shopping Centre, Leicester (within Zone 12 in the Leicester administrative area), which is a modern multiplex providing 12 screens; and

- Vue Cinema, Merdian Leisure Park, Lubbesthorpe Way, Braunstone (within Zone 16 in the Blaby administrative area) which is also a modern multiplex which provides nine screens.

8.10 Respondents to the household survey also indicated that the last cinema they visited was the City Cinema at Abbey Lane, but it should be noted that this closed in 2014 and has been converted into a church. Accordingly, the five cinemas in the Study Area identified above accommodate a total of 40 screens (31 in Leicester and nine in Blaby).

8.11 As set out below at Table 8.3, the results of the household survey indicate that the Vue Cinema at Meridian Leisure Park is the single most popular facility, securing 34.6% of trips to the cinema which originate within the Study Area. This is followed then by the Odeon at Freemen's Park (which attracts 23.6% of trips to the cinema which originate within the Study Area) and then the Showcase at Highcross shopping centre (21.4%).

Table 8.3a: Study Area Market Share for Cinema Visits (%)

Zone	Address	1	2	3	4	5	6	7	8
	Leicester								
6.	City Cinema, Abbey Lane	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%
	Phoenix Cinema, Midland St	0.9%	5.5%	3.2%	2.9%	10.6%	8.1%	20.0%	8.4%
	Showcase, Highcross	14.0%	7.2%	13.7%	17.3%	30.6%	28.2%	48.8%	39.0%
7.	Piccadilly, Green Lane Road	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	2.9%	0.0%
12.	Odeon, Freemen's Park	0.0%	3.2%	2.1%	10.8%	32.9%	60.3%	20.0%	18.8%
	Leicester Authority Total	14.9%	15.8%	19.0%	31.0%	74.1%	97.9%	91.7%	68.5%
	Blaby								
16.	Vue, Meridian Leisure Park	22.9%	64.0%	52.5%	67.1%	12.5%	1.1%	4.8%	23.5%
	Blaby Authority Total	22.9%	64.0%	52.5%	67.1%	12.5%	1.1%	4.8%	23.5%
	Other Authority Areas								
OSA	Odeon, Loughborough	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
	Showcase, Coventry	10.9%	14.3%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%
	Odeon, Nuneaton	41.9%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Table 8.3b: Study Area Market Share for Cinema Visits (%)

Zone	Address	9	10	11	12	13	14	15	16	Total
	Leicester									
6.	City Cinema, Abbey Lane	1.8%	0.0%	0.0%	0.0%	0.9%	3.9%	2.5%	0.0%	0.8%
	Phoenix Cinema, Midland St	2.9%	10.0%	11.4%	10.4%	7.0%	3.5%	8.4%	1.8%	6.8%
	Showcase, Highcross	19.3%	33.5%	20.2%	15.8%	33.6%	14.8%	19.1%	18.8%	21.4%
7.	Piccadilly, Green Lane Road	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.3%
12.	Odeon, Freemen's Park	43.4%	12.1%	47.3%	28.0%	30.6%	15.1%	6.7%	0.0%	23.6%
	Leicester Authority Total	67.4%	55.6%	78.8%	54.2%	73.5%	37.3%	36.8%	20.7%	52.8%
	Blaby									
16.	Vue, Meridian Leisure Park	32.6%	44.4%	21.2%	45.8%	25.6%	37.4%	58.3%	76.3%	34.6%
	Blaby Authority Total	32.6%	44.4%	21.2%	45.8%	25.6%	37.4%	58.3%	76.3%	34.6%
	Other Authority Areas									
OSA	Odeon, Loughborough	0.0%	0.0%	0.0%	0.0%	0.0%	25.3%	0.0%	0.0%	3.2%
	Showcase, Coventry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	1.9%
	Odeon, Nuneaton	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	4.7%

Source: Question 38 of Household Survey, Appendix 2. Includes all responses located within Study Area and those receiving more than 1.0% of total market share of trips outside Study Area

8.12 Once again, we estimate that the Study Area has a total estimated population of 703,573 at 2015, increasing to 781,809 at 2031. The Mintel Cinema Market report of May 2011 estimates that the UK population on average visits a cinema 2.7 times per annum and that each cinema screen attracts around 45,228 separate admissions.

8.13 Applying these benchmark averages to the Study Area, we estimate that there will be 1,899,657 cinema admissions arising from the Study Area population at 2015, increasing to 2,110,884 admissions at 2031. Based on the assumed number of visits per screen, we calculate that around 42.0 screens are supported at 2014, increasing to 46.7 screens at 2026. Our calculations are set out below at Table 8.4.

8.14 Based on current market share, we would expect around 22.2 cinema screens to be located in the Leicester administrative area at 2015, increasing to around 24.6 screens at 2031, and for around 14.5 cinema screens to be located in the Blaby administrative area at 2015, increasing to 24.6 around screens at 2031. Accordingly, whilst the overall requirement for screens is very similar to the existing level of provision (the requirement of 42 screens at 2015 being two higher than the actual level of 40), it is evident that Leicester accommodates a greater number of screens than might be expected based on the current market share, which may account for the closure of the cinema at Abbey Lane, and Blaby accommodates a lesser number. However, it should be again be noted that residents of Leicester and Blaby can generally access facilities in the neighbouring authority area without any particular problems and it is therefore appropriate to consider the provision of facilities such as cinemas (which can draw custom from a relatively significant distance) on this basis.

8.15 Accordingly, we consider that the Study Area as a whole generally appropriately meets existing cinema requirements, but that there may be further scope to introduce additional screens in appropriate locations going forward. Compared to national average benchmark, we identify that there is a comparative shortfall of 2.0 cinema screens at 2015, increasing to a shortfall of 6.7 screens at 2031. Whilst we do not consider any such need to be particularly substantial or pressing, both authorities should be aware that cinema operators may react to meet any unmet demand and that any such proposals should again be judged on their own merit in accordance with relevant town centre planning policy at the time of an application's submission. Such proposals could, subject to site constraints, take the form of additional screens within existing cinema facilities. In considering how existing facilities meet needs, it should also be noted that, as set out previously in Section 7, the Piccadilly Cinema at Green Lane is the subject of an extant planning permission which provides for its change of use for retail purposes. Accordingly, should this planning consent be implemented, there may be a need to consider whether the greater shortfall that would arise might need to be addressed.

Table 8.4a: Cinema Screen Requirement in Study Area

Year	Study Area Population	Number of Cinema Visits Per Person	Attendance	Number of Admissions Required to Support Screen	Screens Supported
2015	703,573	2.7	1,899,647	45,228	42.0
2020	729,890	2.7	1,970,703	45,228	43.6
2025	755,671	2.7	2,040,312	45,228	45.1
2030	777,888	2.7	2,100,298	45,228	46.4
2031	781,809	2.7	2,110,884	45,228	46.7

Table 8.4b: Cinema Screen Requirement in Study Area

Year	Screens Supported	Study Area Custom Claimed by Leicester	Potential Number of Screens Supported in Leicester	Study Area Custom Claimed by Blaby	Potential Number of Supported in Blaby
2015	42.0	52.8%	22.2	34.6%	14.5
2020	43.6	52.8%	23.0	34.6%	15.1
2025	45.1	52.8%	23.8	34.6%	15.6
2030	46.4	52.8%	24.5	34.6%	16.1
2031	46.7	52.8%	24.6	34.6%	16.1

Note: Number of cinema trips per person and number of admission per screen derived from Mintel Cinema Market report of May 2011

Ten Pin Bowling

8.16 There is a single ten pin bowling alley within the Study Area, this being the Hollywood Bowl at Meridian Leisure Park in Zone 16 in the Blaby administrative area. Accordingly, there is no ten pin bowling facility within the Leicester administrative area.

8.17 Given the above, it is unsurprising that the Hollywood Bowl is by far the most popular ten pin bowling destination, attracting 91.3% of all bowling trips that originate within the Study Area. Furthermore, the household survey indicates that the Hollywood Bowl actually attracts all trips to undertake ten pin bowling in eight zones (these being Zones 2, 4, 7, 11, 13, 14, 15 and 16).

8.18 Other ten pin bowling alleys in the wider area include Tenpin at Coventry, the Superbowl at Rugby and MFA Bowl at Nuneaton, which account for relatively few journeys across the Study Area and only really help meet the needs of those at the periphery of the Study Area.

Table 8.5a: Study Area Market Share for Ten Pin Bowling Visits (%)

Zone	Address	1	2	3	4	5	6	7	8
	Blaby								
16.	Hollywood Bowl, Meridian Leisure Park	32.8%	100.0%	56.4%	100.0%	72.4%	83.7%	100.0%	89.9%
	Blaby Authority Total	32.8%	100.0%	56.4%	100.0%	72.4%	83.7%	100.0%	89.9%
	Other Authority Areas								
OSA	MFA Bowl, Nuneaton	22.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Rugby Superbowl, Rugby	0.0%	0.0%	40.1%	0.0%	17.9%	16.3%	0.0%	10.1%
	Tenpin, Coventry	44.8%	0.0%	0.0%	0.0%	9.6%	0.0%	0.0%	0.0%

Table 8.5b: Study Area Market Share for Ten Pin Bowling Visits (%)

Zone	Address	9	10	11	12	13	14	15	16	Total
	Blaby									
16.	Hollywood Bowl, Meridian Leisure Park	97.4%	89.7%	100%	95.7%	100%	100%	100%	100%	91.3%
	Blaby Authority Total	97.4%	89.7%	100%	95.7%	100%	100%	100%	100%	91.3%
	Other Authority Areas									
OSA	MFA Bowl, Nuneaton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%
	Rugby Superbowl, Rugby	0.0%	10.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%
	Tenpin, Coventry	0.0%	0.0%	0.0%	4.3%	0.0%	0.0%	0.0%	0.0%	4.2%

Source: Question 41 of Household Survey, Appendix 2. Includes all responses located within Study Area and those receiving more than 1.0% of total market share of trips outside Study Area

8.19 In terms of the expected benchmark level of provision, we note that the Mintel Tenpin Bowling report of July 2010 identified that there were 5,822 bowling lanes across the UK in 2010. Given that the UK population at 2010 was approximately 62.7 million[46], this equates to one lane for every 10,769 persons.

8.20 We again estimate that the Study Area has a population of 703,573 at 2015, increasing to 781,809 at 2031. Based on the assumed benchmark identified above, we calculate that around 65.3 ten pin bowling lanes could be supported by the Study Area population at 2015, increasing to 72.6 lanes at 2031. Whilst the below table has apportioned these according to current market share, this is of limited relevance in this instance given the limited number of facilities and complete lack of any such provision in Leicester.

8.21 We note that the Hollywood Bowl at Meridian Leisure Park has 24 lanes and, as a consequence, there is an apparent undersupply of bowling facilities in the Study Area equating to around 41 lanes at 2015, increasing to 49 lanes at 2031. Based on the combined Leicester and Blaby market share of 91.3%, this equates to a deficiency of 36 lanes across the two authority areas at 2015, increasing to 42 lanes at 2031.

8.22 Whilst there has been a general downturn in the ten pin bowling sector over the past decade, we consider that the Study Area – and the Leicester or Blaby authority areas in particular – might well be able to support an additional ten pin bowling facility in the future. In this regard, it should be noted that whilst the sector as a whole has not performed well of late in recent years, in larger towns and cities a different type of ten pin bowling experience has begun to emerge. Such 'boutique' ten pin

[46] As identified by the Office for National Statistics' Revised Annual Mid-Year Population Estimates 2001 to 2010, December 2013

bowling alleys are typically of a smaller scale and incorporate bars and restaurants in order to integrate into a centre's evening economy and attract a relatively affluent clientele. Accordingly, if any proposals to provide a further ten pin bowling facility do come forward, it may well be that conform to this operating model. We envisage that Leicester city centre is the most likely location to accommodate any such facility.

8.23 We would suggest that Leicester City Council seeks to engage with bowling operators in order to gauge the interest which may exist in providing such a facility within or in close proximity to Leicester city centre and that any future proposals are again judged on their own merit in accordance with relevant town centre planning policy at the time of an application's submission.

Table 8.6: Ten Pin Bowling Requirement in Study Area

Year	Study Area Population	Typical Population Required to Support One Ten Pin Lane	Potential Number of Ten Pin Lanes Supported by Study Area	Study Area Custom Claimed by Leicester	Potential Number of Ten Pin Lanes Supported in Leicester	Study Area Custom Claimed by Blaby	Potential Number of Ten Pin Lanes Supported in Blaby
2015	703,573	10,769	65.3	0.0%	0.0	91.3%	59.6
2020	729,890	10,769	67.8	0.0%	0.0	91.3%	61.9
2025	755,671	10,769	70.2	0.0%	0.0	91.3%	64.1
2030	777,888	10,769	72.2	0.0%	0.0	91.3%	65.9
2031	781,809	10,769	72.6	0.0%	0.0	91.3%	66.3

Note: Typical number of persons required to support a bowling lane derived from Mintel Tenpin Bowling report of July 2010

Other Leisure Activities

8.24 Respondents to the household survey were asked which centre or facility they last visited for indoor sports or health and fitness activities. Within the Study Area, the most popular destination for such leisure activities is Aylestone Leisure Centre on Southfields Drive in Leicester, which attracts a market share of 8.7%. Other popular destinations include Soar Valley Leisure Centre in Mountsorrel (7.8%), Enderby Leisure and Golf Club in Enderby (7.5%), Braunstone Leisure Centre in Braunstone (5.9%) and Leicester Leys Leisure Centre in Leicester (5.8%).

8.25 In terms of those respondents to the household survey who undertake restaurant visits, the most popular destination for such trips is Leicester city centre which achieves a market share of 43.9%. The destination within the Study Area which attracts the second greatest market share of restaurant trips is the Meridian Leisure Park, which attracts a market share of 6.1%.

8.26 Respondents to the household survey were also asked if they visit bars, pubs and night clubs. The most popular destination for visiting such establishments was Leicester city centre, which attracts a market share of 41.4% of such trips. In addition, when respondents were asked which centre or facility they last visited for art and cultural activities, Leicester city centre was the most popular destination, achieving a market share of 70.8%.

9.0 Leicester: Key Findings and Recommendations

9.01 Paragraph 23 of the NPPF requires local planning authorities to promote competitive town centres by, *inter alia*:

- recognising town centres as the heart of their communities and by pursuing policies to support their vitality and viability;
- defining a network and hierarchy of centres that is resilient to anticipated future economic changes;
- promoting competitive town centres that provide customer choice and a diverse retail offer;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive; and
- undertake an assessment of the need to expand town centres.

9.02 Each of the above requirements is considered below in relation to the Leicester administrative area in the context provided by this Study. Our recommendations in respect of Leicester's future retail and town centre strategy seek to address the requirements set out in the original Request for Quotation which was issued by the authorities in May 2014.

Summary of Identified Need and Recommendations in Respect of the Council's Future Retail and Town Centre Strategy

9.03 In respect of convenience goods retailing, Section 7 of this Study identifies that there is no quantitative requirement for additional convenience goods floorspace in the Leicester administrative area over the short to medium term. However, a need for between 2,300 sq.m and 4,200 sq.m of convenience goods net floorspace is evident at 2025, increasing to a need for between 5,000 and 9,200 sq.m at 2031. The need over this longer term should be monitored in order to ensure that appropriate provision is made to meet all future needs in full.

9.04 However, we also note that there currently appears to be a qualitative deficiency in respect of the provision of main food shopping destinations in the western part of the Leicester administrative area. In addition, the performance of discount foodstores in Leicester is such that the sector currently appears somewhat underprovided for and it may be the case that the City Council can expect further planning applications for such foodstores in the short to medium term. Whilst such proposals may have some beneficial impact, if the proposed sites fall outside of a designated centre, appropriate consideration will need to be given to the requirements of the retail policy tests and the potential for the proposal to be accommodated in a sequentially superior location.

9.05 The initial quantitative need assessment undertaken at Section 7 of the Study identifies a requirement for at least an additional 2,000 sq.m of comparison goods net retail floorspace in the Leicester administrative area at 2020, increasing to a requirement for at least another 34,500 sq.m of comparison goods floorspace at 2031. However, it should be noted that such growth occurs under a 'constant market share' scenario and, in line with 'town centre first' policy principles, we consider that it is appropriate for both authorities to give consideration as to whether growth which could be accommodated at Fosse Park should instead be provided for within or in proximity to Leicester city centre.

9.06 Under this scenario, growth which could occur at Fosse Park (based on the continuation of its current market share) would instead be 'reapportioned' to Leicester city centre. In order for this to occur in practice, it will be necessary to identify appropriate sites which could not only provide large format floorspace, but which would also be attractive to retailers and shoppers.

9.07 On the basis of future Fosse Park growth being reassigned to Leicester city centre, we estimate that there will be a requirement for at least an additional 5,100 sq.m of comparison goods net retail floorspace in the Leicester administrative area at 2020, increasing to a requirement for at least another 53,700 sq.m of comparison goods floorspace at 2031.

9.08 At the time of our reporting, we are aware that a planning application (reference 15/0577/FUL) has been submitted which provides for a substantial extension to Fosse Park at the adjacent Everard's Brewery site. Whilst it is outside of the remit of this Study to consider the acceptability of the Fosse park application proposal, it is evident that the proposal could provide a substantial quantum of comparison goods floorspace which may have implications for how much future growth might need to be accommodated at Leicester city centre. Accordingly, the findings of this report need to be considered in the context of this planning application.

Proposed Network of Centres in Leicester

9.09 Recommendations in respect of the role and function of existing centres are set out at Section 5 of this report. As a consequence of these recommendations, our proposed hierarchy and network of centres for Leicester is provided below.

- **Tier 1: Leicester City Centre**
- **Tier 2: Beaumont Leys Town Centre**
- **Tier 3: District Centres**
  Belgrave Road, Evington Road, Narborough Road.
- **Tier 4: Local Centres**
  Aikman Avenue, Allandale Road/Francis Street, Asquith Boulevard, Aylestone Road/Cavendish Road, Aylestone Village, Blackbird Road/Groby Road/Woodgate, Catherine Street/Canon Street, Downing Drive, East Park Road (North), Egginton Street, Evington Village, The Exchange, Fosse Road North, Gipsy Lane, Green Lane Road/Bridge Street, Hamilton, Hartington Road, Hinckley Road, Home Farm, Strasbourg Drive, King Richard's Road, Lockerbie Walk, London Road, Loughborough Road, Malabar Road, Marwood Road, Melbourne Road, Nedham Street, Netherhall Road, Queen's Road, Saffron Lane/Burnaston Road, Saffron Lane/Cavendish Road, Saffron Lane/Duncan Road, Saint Saviour's Road (West), Saint Stephen's Road, Sandshill Avenue, Sparkenhoe Street, Swinford Avenue, Thorncourt Road, Uppingham Road (East), Uppingham Road (West), Victoria Road East, Wakerley Road/Ethel Road, Welford Road/Gainsborough Road, Welford Road/York Road and Wood Hill.
- **Tier 5: Neighbourhood Parades**
  Abbey Lane, Aylestone Road/Hazel Street, Aylmer Road, Barley Croft Centre, Beaumont Lodge, Bede Park, Belgrave Boulevard, Berners Street, Burnham Drive, Catherine Street/Brandon Street, East Park Road (South), Fosse Road South/Harrow Road, Fosse Road South/Hinkley Road, Fosse Road South/Upperton Road, Fullhurst Avenue, Gervas Road, Guthridge Crescent, Green Lane Road/Coleman Road, Harrison Road, Heyford Road, Humberstone Road/Farringdon Street, Humberstone Village, Lanesborough Road, Meadvale Road, Parkstone Road/Cardinals Walk, Nicklaus Road, Norwich Road, Raven Road, Ryder Road (Braunstone Frith), Saint Saviour's Road (East), Sharmon Crescent, Southfields Drive, Upperton Road/Wilberforce Road, Walnut Street, Wellinger Way, Wharf Street North and Wheatland Road.

9.10 In considering the above, it should be noted that the NPPF clearly identifies that small parades of shops of purely neighbourhood significance do not constitute a defined centre. Accordingly, we do not anticipate that these neighbourhood parades would be afforded the status of a centre when considering the appropriateness of additional main town centre development in accordance with the key retail tests of impact and the sequential approach set out in the NPPF.

9.11 However, we do note that paragraph 70 of the NPPF indicates that:

'To deliver the social, recreational and cultural facilities and services the community needs, 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**
- **ensure an integrated approach to considering the location of housing, economic uses and community facilities and services.'**

9.12 Accordingly, it may be appropriate to bring forward a local policy which is consistent with the above policy and which appropriately provides for the maintenance and enhancement of neighbourhood parades.

9.13 The spatial distribution of the proposed network of centres is set out at Appendix 9.

9.14 We are aware that significant residential growth is planned at Ashton Green, Abbey Meadows, St Georges North and Waterside, and that appropriate retail and other main town centre facilities will be required to provide for the needs of residents in a sustainable manner. The appropriate scale and location for additional retail facilities to serve local needs arising from planned housing growth will need to be determined with reference to the exact location of future development, the dwelling densities which will be realised, and the scale and location of existing retail and service provision.

9.15 In considering the future need for additional local shopping facilities, it will be necessary to understand the critical mass of households or population which may be required to support additional retail and service provision. It is therefore helpful to consider typical benchmarks in terms of the local population required to support viable local facilities. In this regard, we consider that the Integration of Parish Plans into the Wider Systems of Local Government report (Department for Environment, Food and Rural Affairs, July 2007) provides a realistic assessment of the number of homes which are required to support various types of facilities. The Integration of Parish Plans report is accepted as a credible source of such benchmark data by the Towards Sustainable Communities: Eco-towns

Community Worksheet (Town and Country Planning Association and Department for Communities and Local Government, March 2008) which seeks to provide instruction to the promoters of sites and to Council officers in considering the need for additional facilities to serve new residential developments.

9.16 Table 2.1 of the Integration of Parish Plans report considers the number of households which may typically be required to support GPs' surgeries, groups of shops, post offices and libraries. An extract from the report's Table 2.1 is provided below as our Table 9.1.

Table 9.1: Facilities and the Number of Households the Serve (as Amended from Integration of Parish Plans into the Wider Systems of Local Government report)

Facility	Number of Households Required to Support Specified Facility	WYG s Estimate of Population to Support Specified Facility Based on Assumed Dwelling Occupation[1]
GPs' Surgery	1,000 to 1,200	2,500 to 3,000
Group of Shops	2,000 to 4,000	5,000 to 10,000
Post Office	2,000 to 4,000	5,000 to 10,000
Library	4,800 to 12,000	12,000 to 30,000

[1] Based on an average occupancy of 2.5 persons per dwelling, reflecting current housing occupation throughout the Study Area

9.17 Based on the above, in planning for additional local centres, a population of above 5,000 persons (or 2,000 households) can be taken to be an approximate indicator of the catchment population required to support a 'group of shops' or a local centre.

9.18 As we note above, no current definition of a local or district centre is provided by the extant Government guidance. In very general terms, we would typically expect a local centre serving a small catchment area to have a small supermarket, an additional number of shops of a local nature (possibly including a newsagent and post office) and an ATM. The ATM will often be inside the grocery store. Other uses that may be expected in a local centre are a hot food takeaway and a hairdresser. District centres are likely to have all of the above (and in greater number) and have an additional community function. A district centre may well accommodate a community centre of some form, a doctors' surgery or health centre and, at least on occasion, a library and educational facilities.

9.19 The number and distribution of additional centres should be determined with reference to the delivery of future housing growth. Some new dwellings may be able to be appropriately served by existing centres, whilst other new residential developments would be better served by a new local centre. The proximity of any new centre to existing local centres or other higher order centres will also determine whether there is scope for the creation of a higher order centre (i.e. district centre). In our experience, a district centre will generally be supported by in excess of 10,000 persons.

Recommended Local Impact Threshold

9.20 In accordance with the requirements of paragraph 26 of the NPPF, it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail, leisure and office development which should be the subject of an impact assessment. Any such threshold policy applies only to the impact test (all planning applications for main town centre uses that are not in an existing centre and not in accordance with an up-to-date development plan should be subjected to the sequential test[47]).

9.21 We do not consider that a blanket threshold will usually be appropriate across all types of centre within an administrative area. For example, a convenience store with a net sales area of 250 sq.m (which could be operated by Tesco Express or Sainsbury's Local) would clearly have a significantly greater impact on a small centre than it would on a large city centre. Therefore, in implementing a local threshold policy, it is considered more appropriate to utilise a range of thresholds, relating to the type of centre the proposed development is proximate to.

9.22 We consider that an appropriate 'tiered' impact threshold policy would ensure that development proposals providing greater than 1,000 sq.m gross floorspace for retail, leisure or office uses in an edge or out of centre location proximate to Leicester city centre should be the subject of an impact assessment. It is considered appropriate to reduce the threshold around Beaumont Leys town centre to 500 sq.m gross floorspace, around district centres to 300 sq.m gross floorspace, and around local centres to 200 sq.m gross floorspace.

9.23 In our experience, it will only generally be development of a scale greater than these thresholds which could lead to a 'significant adverse' impact, which could merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 27 of the NPPF. In setting the thresholds, we have had regard to the trading model of the smaller convenience goods store format operated by the likes of Morrisons, Sainsbury's and Tesco. Such stores generally have net sales areas slightly below the 280 sq.m net sales area limit for extended Sunday trading and generally have a gross floorspace approaching 400 sq.m. Whilst of a relatively moderate size, these convenience stores often have a relatively substantial turnover and it is considered necessary for the local planning authority to

[47] With the exception (in accordance with paragraph 25 of the NPPF) of small scale rural office proposals and other small scale rural development

retain control in respect of the consideration of impacts arising from the implementation of such proposals.

9.24 The thresholds should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate in practice.

9.25 The proposed thresholds at city, town, district and local centre level are considered to reflect the relatively small size of some of the centres at the lower end of the retail hierarchy and their consequent potential susceptibility to alternative out of centre provision. In our experience, a 200 sq.m (gross) operation located outside but in proximity to a defined local or district centre has the potential to impact on its performance. However, in practice, it is envisaged that a proposal of just greater than 200 sq.m adjacent to a local centre would generally only require an Impact Assessment of limited length (i.e. for development of such a scale, impact may on occasion be able to be dealt with as part of the covering letter accompanying the application). Where an application proposal is above the respective stated impact threshold we would recommend that the applicant discusses and agrees the scope of any retail impact assessment which is appropriate to the scale and nature of the proposed development, and identifies any specific local issues that may need to be addressed.

Review of Leicester City Centre Boundaries

9.26 The city centre boundaries have been considered in accordance with the NPPF definition of a Primary and Secondary Shopping Frontage and a Primary Shopping Area (PSA). The Primary Shopping Frontages are mainly focussed around High Street, Humberstone Gate, Haymarket, Highcross Shopping Centre and Gallowtree Gate. We consider the historic part of the city centre around Market Place, Silver Street, Clark Street and their adjoining side streets to also perform the role of a Primary Shopping Frontage. The Secondary Shopping Frontages are located in the more peripheral parts of the city centre, such as Charles Street, the streets to the south of Market Place South and Halford Street and the area comprising mainly leisure uses to the west of Highcross Shopping Centre.

9.27 Our recommended PSA largely corresponds with the Central Shopping Core, as defined by Core Strategy Policy CS11, with only three locations where our recommendation differs. Mansfield Street and Sandacre Street, which are located towards the north of the PSA, contain sufficiently low levels of active retail frontage to not comprise a Secondary Shopping Frontage. However, we consider there to be a sufficient diversity of uses at 62-82 Charles Street to comprise a Secondary Shopping Frontage. Similarly, we consider the uses to the west of Highcross Street to also comprise a Secondary Shopping Frontage. We therefore recommend that the PSA boundary is changed accordingly. A plan illustrating our recommendations in relation to the PSA, and Primary and Secondary Shopping Frontages is included at Appendix 10.

10.0 Blaby: Key Findings and Recommendations

10.01 Once more we set out below our findings in respect of the relevant requirements of paragraph 23 of the NPPF and the original Request for Quotation which was issued by the authorities in May 2014.

Summary of Identified Need and Recommendations in Respect of the Council's Future Retail and Town Centre Strategy

10.02 In respect of convenience goods retailing, Section 7 of this Study identifies that there is no quantitative requirement for additional convenience goods floorspace in the Blaby administrative area even over the longer term to 2031. This is due to existing provision effectively undertrading (i.e. turning over less expenditure than expected) and due to there being a relatively significant level of convenience goods commitments. As is the case in Leicester, existing discount foodstores in Blaby are generally trading strongly. However, whilst there may be some benefit in providing additional discount foodstores facilities to meet this overtrading, the existing Aldi stores in Blaby are well located to meet the needs of residents.

10.03 In respect of comparison goods need, the initial assessment undertaken at Section 7 of the Study identifies a requirement for at least an additional 1,900 sq.m of comparison goods net retail floorspace in the Blaby administrative area at 2020, increasing to a requirement for at least another 19,300 sq.m of comparison goods floorspace at 2031. Should growth be apparent under this 'constant market share' scenario and, in line with 'town centre first' policy principles, we consider that it is appropriate for both authorities to give consideration as to whether growth which could be accommodated at Fosse Park should instead be provided for within or in proximity to Leicester city centre.

10.04 Under this scenario, growth which could occur at Fosse Park (based on the continuation of its current market share) would instead be 'reapportioned' to Leicester city centre, as the sub-regional centre. In order for this to occur in practice, it will be necessary for Leicester City Council to identify appropriate sites which could not only provide large format floorspace, but which would also be attractive to retailers and shoppers.

10.05 On the basis of future Fosse Park growth being reassigned to Leicester city centre, we estimate that there will be a requirement for only a very limited quantum of additional comparison goods floorspace in Blaby over the longer term. Indeed, we estimate that this revised requirement in Blaby would equate to a minimum of just 200 sq.m at 2031.

10.06 At the time of our reporting, we are aware that a planning application (reference 15/0577/FUL) has been submitted which provides for a substantial extension to Fosse Park at the adjacent Everard's Brewery site. Whilst it is outside of the remit of this Study to consider the acceptability of the Fosse Park application proposal, it is evident that the proposal could provide a substantial quantum of comparison goods floorspace which may have implications for how much future growth might need to be accommodated at Leicester city centre.

Proposed Network of Centres in Blaby

10.07 Recommendations in respect of the role and function of existing centres are set out at Section 5 of this report. As a consequence of these recommendations, our proposed hierarchy and network of centres for Blaby is provided below. We include Leicester city centre due to its proximity and clear role in helping to meet the comparison goods shopping needs and service needs of Blaby's residents. The hierarchy takes into consideration the recommendations provided at Section 5 of this report, including the proposed de-allocation of Sapcote local centre from the retail hierarchy (due to the limited and dispersed nature of its provision).

- **Tier 1: Leicester City Centre**
- **Tier 2: Blaby Town Centre**
- **Tier 3: District Centres**
  Enderby, Glenfield and Narborough.
- **Tier 4: Local Centres**
  Countesthorpe and Stoney Stanton.
- **Tier 5: Neighbourhood Parades**
  Cosby, Glen Parva, Huncote, Kirby Muxloe, Leicester Forest East and Whetstone.

10.08 Once more, it should be noted that neighbourhood parades are not generally considered to have the status of a define centre. However, we note that paragraph 70 of the NPPF provides for local planning authorities to **'...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.'**

10.09 Accordingly, it may be appropriate to bring forward a local policy which is consistent with NPPF paragraph 26 and which appropriately provides for the maintenance and enhancement of neighbourhood parades.

10.10 The spatial distribution of the proposed network of centres is set out at Appendix 9.

10.11 We are aware that significant residential growth is planned at Lubbesthorpe, to the north west of junction 21 of the M1. Appropriate retail and other main town centre facilities will be required to provide for the needs of Lubbesthorpe residents in a sustainable manner. The appropriate scale and location for additional retail facilities to serve local needs arising from the planned housing growth will need to be determined with reference to the dwelling densities which will be realised, and the scale and location of existing retail and service provision.

10.12 In considering the future need for additional local shopping facilities, it will be necessary to understand the critical mass of households or population which may be required to support additional retail and service provision. It is therefore helpful to consider typical benchmarks in terms of the local population required to support viable local facilities. In this regard, we consider that the Integration of Parish Plans into the Wider Systems of Local Government report (Department for Environment, Food and Rural Affairs, July 2007) provides a realistic assessment of the number of homes which are required to support various types of facilities. The Integration of Parish Plans report is accepted as a credible source of such benchmark data by the Towards Sustainable Communities: Eco-towns Community Worksheet (Town and Country Planning Association and Department for Communities and Local Government, March 2008) which seeks to provide instruction to the promoters of sites and to Council officers in considering the need for additional facilities to serve new residential developments.

10.13 Table 2.1 of the Integration of Parish Plans report considers the number of households which may typically be required to support GPs' surgeries, groups of shops, post offices and libraries. An extract from the report's Table 2.1 is provided below as our Table 10.1.

Table 10.1: Facilities and the Number of Households the Serve (as Amended from Integration of Parish Plans into the Wider Systems of Local Government report)

Facility	Number of Households Required to Support Specified Facility	WYG s Estimate of Population to Support Specified Facility Based on Assumed Dwelling Occupation[1]
GPs' Surgery	1,000 to 1,200	2,500 to 3,000
Group of Shops	2,000 to 4,000	5,000 to 10,000
Post Office	2,000 to 4,000	5,000 to 10,000
Library	4,800 to 12,000	12,000 to 30,000

[1] Based on an average occupancy of 2.5 persons per dwelling, reflecting current housing occupation throughout the Study Area

10.14 Based on the above, in planning for additional local centres, a population of above 5,000 persons (or 2,000 households) can be taken to be an approximate indicator of the catchment population required to support a 'group of shops' or a local centre.

10.15 As we note above, no current definition of a local or district centre is provided by the extant Government guidance. In very general terms, we would typically expect a local centre serving a small catchment area to have a small supermarket, an additional number of shops of a local nature (possibly including a newsagent and post office) and an ATM. The ATM will often be inside the grocery store. Other uses that may be expected in a local centre are a hot food takeaway and a hairdresser. District centres are likely to have all of the above (and in greater number) and have an additional community function. A district centre may well accommodate a community centre of some form, a doctors' surgery or health centre and, at least on occasion, a library and educational facilities.

10.16 The number and distribution of additional centres should be determined with reference to the delivery of future housing growth. Some new dwellings may be able to be appropriately served by existing centres, whilst other new residential developments would be better served by a new local centre. The proximity of any new centre to existing local centres or other higher order centres will also determine whether there is scope for the creation of a higher order centre (i.e. district centre). In our experience, a district centre will generally be supported by in excess of 10,000 persons.

Recommended Local Impact Threshold

10.17 In accordance with the requirements of paragraph 26 of the NPPF, it is also appropriate to identify thresholds for the scale of edge of centre and out of centre retail, leisure and office development which should be the subject of an impact assessment in Blaby.

10.18 Once more, we do not consider that a blanket threshold will usually be appropriate across all types of centre and instead consider it more appropriate to utilise a range of thresholds, relating to the type of centre the proposed development is proximate to.

10.19 We consider that an appropriate 'tiered' impact threshold policy would ensure that development proposals providing greater than 500 sq.m gross floorspace for retail, leisure or office uses in an edge or out of centre location proximate to Blaby town centre should be the subject of an impact assessment. It is considered appropriate to reduce the threshold around district centres to 300 sq.m gross floorspace and around local centres to 200 sq.m gross floorspace.

10.20 As set out in the previous section of this report, in our experience, it will only generally be development of a scale greater than these thresholds which could lead to a 'significant adverse' impact and which would merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 27 of the NPPF. In setting the thresholds, we have had regard to the trading model of the smaller convenience goods store format operated by the likes of Morrisons, Sainsbury's and Tesco, which often attract significant custom. Accordingly, it is considered necessary for the local planning authority to retain control in respect of the consideration of impacts arising from the implementation of such proposals.

10.21 The thresholds should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate in practice.

Review of Primary and Secondary Frontages of Blaby Town Centre

10.22 In accordance with the requirements of the Request for Quotation, we have also reviewed Blaby town centre's primary and secondary shopping frontages and the overall town centre boundary. Our review has been informed by our survey of the centre of November 2014. Our review has also been informed by definition of primary and secondary frontages provided by Annex 2 of the NPPF which identifies that:

'Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.'

10.23 Annex 2 of the NPPF also indicates that a primary shopping area will generally comprise a centre's primary shopping frontages and those secondary frontages which are adjoining and closely related to the primary frontages. Our proposed town centre boundary and retail frontages for Blaby town centre seek to define a relatively tight area, both to reflect the pattern of uses 'on the ground' but also to ensure that the boundaries do not act to identify an inappropriately large area for the purpose of the application of the sequential approach to development.

10.24 Our proposed primary and secondary frontages and town centre boundary for Blaby are set out in its health check assessment which is provided at Appendix 5.

Glossary of Terms

Capacity	Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities.
Comparison Goods	Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods. A more detailed breakdown of comparison goods categories is provided below.
Chemist Goods	*All consumer retail expenditure on prescription and non-prescription drugs, adhesive and non-adhesive bandages, first-aid kits, hot-water bottles, toilet shops, sponges, and so on.*
Clothing & Footwear	*All consumer retail expenditure on shoes and other footwear, garments for men, women, children and infants either ready-to-wear or made-to-measure, underwear, ties, handkerchiefs, scarves, and so on.*
DIY Goods	*Includes all consumer expenditure on hardware, DIY, decorators' supplies and garden centre type goods. This category includes products such as hammers, saw, screwdrivers, wallpaper, plumbing items, floorboards, ceramic tiles, plants, pots, turf for lawns, and so on.*
Electrical Goods	*All consumer retail expenditure on domestic electrical and gas appliances, such as washing machines, dryers, dishwashers, ironing and press machines, cookers, freezers and fridge-freezers, coffee makers, radios, televisions, DVD players, and so on.*
Furniture Goods	*Includes all consumer expenditure on furniture, floor coverings and household textiles such as beds, sofas, tables , cupboards, bed linen, curtains, towels, lamps, mirrors, and so on.*
Household Goods	*Includes household textiles and soft furnishings, china, glassware, jewellery and other miscellaneous goods such as greeting cards, notebooks, pens, pencils, and so on.*

Recreational Goods	*All consumer retail expenditure on bicycles and tricycles (excluding toy bicycles), musical instruments, sports equipment, camping equipment, toys of all kinds including dolls, soft toys, and so on.*
Convenience Goods	Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines.
District Centre	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
Expenditure Per Capita	The average spend of each person within the defined Study Area on a variety of retail goods.
Expenditure	Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.
Expenditure Forecasts	This assessment has been undertaken using the 'goods based' approach as prescribed in the Planning for Town Centres Practice Guidance. Retail expenditure forecasts have been derived from Experian Retail Planner Briefing Note 12.1 (October 2014).
Experian (MMG3)	The database used to identify population, expenditure and socio-economic breakdown of the Study Area population.
Gross Floorspace	Represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, and so on).
GOAD Plans	Provide accurate information on the composition of town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Identifies the fascia name, retail category, floorspace, and exact location of all retail outlets and vacant premises.

GOAD Reports	Provide a snap-shot of the retail status or demographic make-up of Goad surveyed town centres. Provides a comprehensive breakdown of floorspace and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial/Business Services and Vacancy sectors.
Local Centre	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.
Net Floorspace	Represents the level of internal area devoted to the sale of goods.
Market Share	Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility.
National Multiple	This is defined as a retail or service operator which is or part of a network of nine or more outlets.
Price Base	The price base for the Study is 2015; all prices are or have been adjusted to 2013 in order to be consistent.
Rates of Productivity	This takes into account the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.).
Sales Density	Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/foot.

Special Forms of Trading	Defined by Experian as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls.
Study Area	This represents the household survey area, which is based on postal sectors.
Trade Draw	This refers to the level of trade attracted to a particular facility/centre from a particular area.
Turnover	The turnover figure relates to the annual turnover generated by existing retail facilities.
Town Centre	A town centre will usually be the second level of centres after city centres and, in many cases, they will be the principal centre of centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.