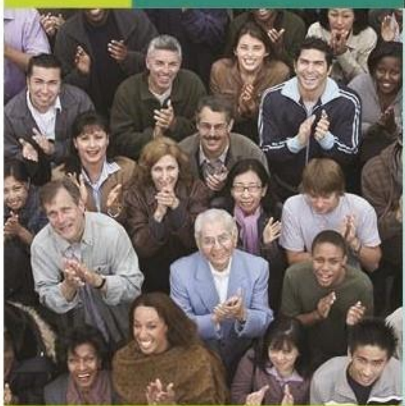
E R S
Research &
Consultancy

Leicestershire Market Towns Research

Final Report



ERS
30 Queen Square
Bristol
BS1 4ND

T: 0117 927 3401
F: 0117 929 4189
E: bristol@ers.org.uk
www.ers.org.uk

Table of Contents

EXECUTIVE SUMMARY

Introduction and Context

In November 2015, ERS was commissioned to undertake an economic study relating to 11 market towns across Leicestershire. The research sought to highlight and fill gaps in economic knowledge, identify current issues and develop/recommend project ideas. It was based largely on an extensive review of documentation, comprehensive data analysis and (at least) two focus groups in each town, involving strategic stakeholders and local business representatives.

This report includes separate chapters on each of the 11 market towns, as well as overall conclusions and recommendations. A profile of each of the Boroughs/Districts within which these towns are located is published as a companion document.

The rise in internet shopping and changing strategies of many multiple retailers (to fewer sites with bigger catchment areas) has impacted negatively on market towns across the country. As a result, long-term shifts towards high streets which are more orientated to service provision than retail can be expected to continue.

For its part, Leicester and Leicestershire Local Enterprise Partnership (LLEP) has set out its priorities in its Strategic Economic Plan (SEP). These divide between Place, Business and People.

Place

In respect of Place, amongst the 'Growth Areas' are: Coalville Growth Corridor, Loughborough and South West Leicestershire', and amongst the 'Transformational Priorities' is Loughborough University Science & Enterprise Parks. This is an opportunity for people working in those growth areas to utilise the adjacent town centres. In respect of **place**, Leicestershire's market towns are especially well placed to do the following:

- Lever in new investment
- Contribute to new employment space
- Host more business start ups
- Accommodate new homes
- Generate new jobs

Business

Town centres play a key role in respect of tourism and whilst some of the towns are already established visitor destinations (perhaps most notably Market Harborough and Melton Mowbray) most have potential for further development. In addition, some towns play significant roles in respect of professional services whilst larger settlements have also attracted technology-based businesses. In all cases, there is scope for business support to enable local firms to enhance their offer and become more sustainable. In respect of **business**, Leicestershire's market towns are especially well placed to do the following:

- Be the focus for dedicated business support
- Provide support for growth by providing the right environment and infrastructure for growth.

People

Whilst there is undoubtedly a case for investments to enhance the built environment, equally there is a need to invest in people to ensure that businesses can fully exploit opportunities and individuals have the skills to maximise their employment prospects. In respect of **people**, Leicestershire's market towns are especially well placed to do the following:

- Enhancement of retail and hospitality skills
- Retention of local people and development of the knowledge economy

In addition, LLEP has identified eight key sectors which will support the delivery of the aims and objectives outlined in the SEP and ESIF Strategies. In respect of current sector priorities, the area common to all market towns is tourism and hospitality. In addition, specific towns have strengths and potential in respect of other sector priorities, including food and drink manufacturing, creative industries and professional/financial services. How the four relevant sector growth plans relate to issues within these Market Towns and how town centres can be utilised to deliver actions within the sector growth plans is summarised below.

Food and Drink Sector Growth Plan

There is evidence that localised food and drink offers can develop and enhance cultural identity and instil community pride and sense of place. There is a need to introduce measures to promote a Leicestershire brand, not just for Food and Drink, but linked to the identity of our Market Towns. This sector is strongest in Melton Mowbray and surrounding areas which has been designated as a Food Enterprise Zone, allowing relaxations to planning in order to attract new businesses.

Opportunities exists to build on the Farmers Markets held in market towns across the County, and to use food festivals as a means of raising awareness of local producers and delivering economic impacts by extending the tourism season and attracting additional visitors. Farmers Markets provide an opportunity for new "kitchen table" micro businesses to test and launch their products and the inter-relationship between the market town and these businesses needs to be harnessed.

Creative Industries Sector Growth Plan

Across Leicester and Leicestershire, around 8,000 people work in the creative industries, one third of them employed in tourism-related activities. Whilst one third of these jobs are in Leicester, the other two thirds are spread across the County, with Market Harborough having the largest concentration, followed by Charnwood (in and around Loughborough) and Hinckley (with creative hubs such as the Atkins building).

A key project is to develop a Creative Quarters Agency for Leicester and Leicestershire linking with the University of Loughborough and Atkins Building in Hinckley. Another proposed project is to celebrate a Leicestershire Design Festival to showcase commercial and creative businesses which could be hosted in the County's market towns. Loughborough Generator creative hub project is specifically mentioned and there is a need to grow hubs in town centres, building on existing ones, such as the Atkins Building in Hinckley or creating new ones which could link to the proposed key sites officer and the development of business accommodation on vacant/derelict sites

Textiles Sector Growth Plan

There is heavy clustering of textile manufacturing firms around Leicester City but there is a significant presence around Hinckley, as well as activity in Market Harborough, Lutterworth and Loughborough. Many of the larger factories have been converted into housing in towns such as Earl Shilton and the skills of the workforce have been lost. Many clothing headquarters are located in the County even if manufacturing has reduced. The action plan states that greater retail links need to be made and this sector could be used to brand some of the Market Towns in the same way that Food and Drink is used in Melton Mowbray.

Tourism and Hospitality Growth Plan

Benefits of a localised food and drink offer have helped to assist regeneration elsewhere and could be replicated in Leicestershire. Examples exist of increased number and quality of restaurants, and food and drink establishments working collaboratively with each other, thereby helping to encourage new mixed use developments. This then increases the volume and value of tourism and creates new jobs.

There is a need to develop the County's cultural assets and iconic buildings and attractions, many of which are in Leicestershire's Market Towns. In order to fully exploit business opportunities, this report highlights the need to increase digital skills and capability of businesses, which also links to the proposed Digital project for the town centres.

The report highlights that Tourism supports indirect job creation, especially in retail and hospitality, and there is a need to improve smaller scale visitor sites (cultural, heritage and leisure) many of which are in Market Towns, as well as raise the quality of the retail and hospitality offer in many cases.

Economic Value

The combined economic value of the town centres that feature in this report is around £1.1 billion. There are no exact equivalents for Leicester City Centre and Fosse Park, but their estimated Gross Value Added (GVA) is £168 million and £102 million respectively. In addition, the 11 market town centres collectively provide employment for more than 25,000 people (mainly in retail and hospitality). This underlines the economic importance of Leicestershire's market towns and indicates that relatively modest economic growth in percentage terms could deliver significant economic benefits in absolute terms. It must be remembered that the Town Centre boundaries as identified in Appendix 4 play a huge factor in determining the number of people who live in the Town Centre and hence the number of workers and can vary hugely.

As can be seen in 1.32 later in the study the proportion of workers who are employed in the Service sector varies from 32% in Wigston through to 50.3% in Melton Mowbray, which provides a strong link to the LLEP sector growth plan around Professional and Financial Services. This sector is one the LLEP's key areas for growth as it ensures that the skill base remains high and when people come into town to access a service they may utilise the retail outlets as well. The availability of affordable office space either above shops or in areas adjacent to primary retail areas are opportunities that could be utilised to regenerate Leicestershire's Market Towns

Value of Town Centre Economic Activity

	Workers	GVA £m	Proportion
Ashby	2,121	83.5	7.9%
Blaby	721	32.6	3.1%
Coalville	3,063	135.6	12.8%
Earl Shilton & Barwell	1,283	56.0	5.3%
Hinckley	3,843	167.0	15.7%
Loughborough	5,048	199.4	18.8%
Lutterworth	1,268	53.5	4.8%
Market Harborough	3,240	138.7	13.1%
Melton Mowbray	2,918	126.8	12.0%
Shepshed	482	18.0	1.7%
Wigston	1,210	49.9	4.7%
Total	**25,197**	**1,061**	**100.0%**
Source: ONS figures and ERS analysis			

In addition, Leicestershire's Market Towns represent a total of more than £2 billion of spending power (£760 million of convenience expenditure and £1,271 million of comparison expenditure). The extent to which this spending is retained within local economies ranges from 9% (Earl Shilton & Barwell) to 90% (Market Harborough) in respect of convenience shopping and from 3% (Blaby) to 45% (Loughborough) in respect of comparison shopping.

Town Centre Retail Spending Retention				
	Convenience		**Comparison**	
	(£m)	% Retained	(£m)	% Retained
Ashby	36.1	20	57.4	23
Blaby	83.2	25	134.3	3
Coalville	108.6	15	168.9	28
Earl Shilton & Barwell	27.1	9	42.9	N/K
Hinckley	97.4	N/K	154.8	43
Loughborough	127.6	28	218.0	45
Lutterworth	20.0	79	32.6	17
Market Harborough	50.4	90	83.1	41
Melton Mowbray	130.1	24	210.5	28
Shepshed	31.7	35	49.9	9
Wigston	48.2	44	119.4	24
Source: Local Authority Retail Studies/Turley				

The issue of connectivity between towns (and elsewhere) is something of a double-edged sword. Better road and rail links to each town may well bring in more spending but could also facilitate greater leakage of expenditure. Nevertheless, it is noted that Midlands Connect (the transport element of the Midlands Engine for Growth) could represent an opportunity to utilise some Market Towns as transport hubs as it highlights the issue that Market Towns have an affordable offer and should be able to attract further growth.

Conclusions and Recommendations

The SWOT analysis below summarises Strengths, Weaknesses, Opportunities and Threats that are common to many of the market towns that feature in this report.

Strengths

- Compact town centres
- Variety of retail offer, including good range of independents
- Low levels of vacancies
- Attractive/historic character
- Parks/public open space
- Good community spirit/high level of community activity

Weaknesses

- Limited cultural/leisure provision
- Limited evening economy
- Limited good quality retail/hospitality offer
- Market in decline
- Poor quality/high cost/limited capacity of car parking
- Low quality built environment/public realm

Opportunities

- Potential to secure spend from new housing developments
- Redevelopment opportunities at key sites
- To create better links between areas through improved signage/development of town trails
- Public realm improvements
- To build on tourist/visitor offer

Threats

- Leicester city centre and Fosse Park, including potential expansion of the latter
- Traffic congestion

Whilst we have summarised potential projects at the end of each town-specific chapter of this report, we have placed an emphasis on County-wide initiatives. In addition, we propose the creation of a feasibility/project development fund to enable these projects to be worked up in more detail.

In particular, there are common property-related issues across the Market Towns, where market failure is apparent and there is a need for public sector intervention in order to facilitate new development and stimulate economic activity. With the public sector undertaking catalysing activities, there is significant potential for the private sector to undertake mixed use schemes involving employment uses other than retail, including those targeted on particular business sectors, such as creative industries.

Currently most of Leicestershire's Market Towns have low vacancy rates and have bucked the national trend happening in most town centres which have suffered from an over-supply of vacant units and this is likely to increase in the future as more retailers rationalise the number of outlets. There is a need to explore creative uses of such units (e.g. pop- up shops) and through planning to turn some of the retail space back to residential to avoid long term vacancies. Some towns suffer from an under supply of certain types of units such as Hinckley so the picture is complex.

In addition to the long term spatial issues in Town Centres, there are a number of ongoing quick win projects, that can be achieved and will increase footfall and awareness including events and digital projects.

Leicestershire's Market Towns are at a critical point; they are set to grow, with sizeable new housing designations, and with continued investment they will continue to buck the national trend of decline, building on their rich heritage and unique identities and will continue to attract both local people and visitors. Failing to do so may see these towns and the County missing out on this economic potential.

The consultant recommendations extend to a large list of projects, with specifics for each town. The project steering group has discussed the deliverability of these and agreed to prioritise and concentrate on progressing interventions grouped into 4 county wide projects.

Market Towns Digital Project

- The provision of free wi-fi within each town centre which more importantly leads to the collation of a database on town centre users, which is used to send marketing campaigns, loyalty card offers and to advertise forthcoming events and inform on local tourism attractions. This is being widely used in Hinckley already and Loughborough has recently had the first phase installed.
- The establishment of click and collect facilities in towns where they do not exist – most multiple retailers already offer this service – this is a collective initiative to benefit independent retailers.
- Improving the online presence of towns and independent retailers within that town most of whom haven't got a presence currently.

Townscape Improvement Project

- Improving the townscape (Well publicised shop front improvement schemes, measures to improve the quality of public spaces, coverings for derelict buildings, improved signage, new street furniture, erection of canopies etc.).
- Public art installations
- The creation of town centre gateways – bringing back into use buildings on key sites at the entrances to town centres, which together with strategically located signage creates a sense of arrival.
- The appointment of a County-wide Key Sites Officer and establishment of Key Sites Fund
- The creation of town centre Enterprise Zones
- The designation of Town Centre Investment Models utilising the Public sector to act as a catalyst to developing key areas in the town centre possibly utilising prudential borrowing and if necessary utilising CPO powers.

Business Friendly Town Centres

- Business support for the retail and hospitality sector to exploit new business opportunities including Business Support Grants as offered by Melton BID.
- The creation of pop-up shops- in order for short term leases to be utilised relaxation of planning policy is required such as change of use and designation of useage types.

- Creation of Incubation space using vacant shops/buildings to encourage a wider business base such as Creative Industries to utilise the town centre like the Atkins Building in Hinckley.
- The revitalisation of markets which could be explored at a county level.
- The creation of Business Improvement Districts where none currently exist, to ensure businesses get involved in the identification of town centre issues and the delivery of projects, funded through levies paid by businesses.
- Use of Local Development Orders to reduce the planning burden and hence encourage developers to invest in key sites.

Market Towns Visitor Economy Project

- The development of a clear identity/brand for individual market towns (linked to the on-line presence above)
- The organisation of a programme of festivals and events to increase footfall and drive sales.
- Showcasing local products/produce
- Joint/complementary marketing campaigns for the benefit of independents
- The creation of trails between and within towns
- The publication of promotional materials
- Delivery of a promotional campaign utilising social media- linked to the loyalty card for example.
- Need to increase collaborative /partnership working of tourism providers for example explore more opportunities for Hotels to link to local businesses – not just food and drink.

The four county wide projects demonstrate the need to have quick wins which will have an instant effect such as the digital project – both on customers to the town centre and for the businesses in terms of data collected enabling targeted marketing campaigns, together with longer term projects that will take time to achieve, such as the initiatives in the townscape project.

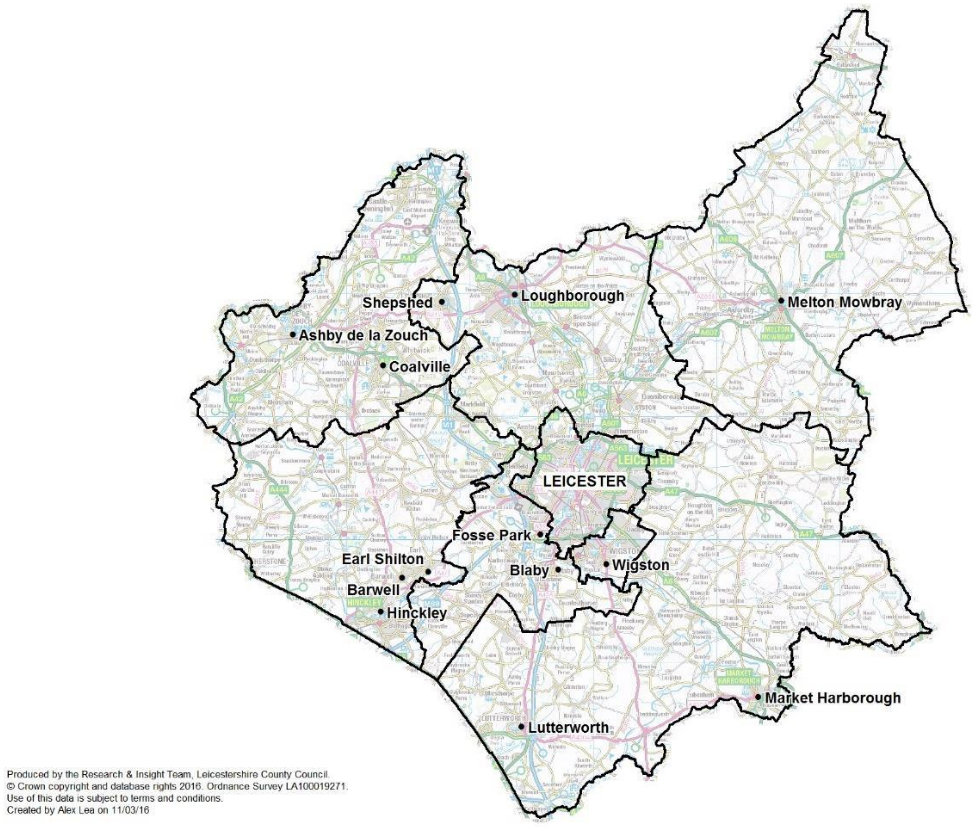
Individual projects as highlighted in town specific chapters, have been submitted to the LLEP for funding via their project pipeline and the report will form the evidence base.

1. INTRODUCTION AND CONTEXT

Introduction

1.1 In November 2015, ERS was commissioned to undertake economic research relating to 11 market towns across Leicestershire, namely:

- Ashby
- Blaby
- Coalville
- Earl Shilton/Barwell
- Hinckley
- Loughborough
- Lutterworth
- Market Harborough
- Melton Mowbray
- Shepshed
- Wigston



1.2 A number of projects from Leicestershire's Market Towns had applied for funding to Leicestershire Local Enterprise Partnership (LLEP) but had failed to support their applications, with sufficiently compelling evidence. In particular, it was felt that there was a need to better demonstrate the importance of these towns to the Leicestershire economy in terms of both current and potential impact. Consequently, this research was commissioned to highlight and fill gaps in economic knowledge, identify current issues and develop/recommend project ideas.

Context

1.3 The KPMG/British Retail Consortium quarterly retail sales monitor reports have shown that consumer spending on the internet continues to increase whilst shopping malls continue to see visitor numbers rise. These two factors in particular have combined to squeeze activity out of town centres and are continuing to do so. In the context of this study, the further expansion of Fosse Park may impact negatively on Leicestershire's market towns whilst internet shopping is more likely to increase than decrease as older consumers are replaced by younger (generally more tech savvy/confident) consumers.

1.4 There is therefore no doubt that all of the town centres featured in this report have been affected by changes in retail and leisure habits, though some to a much greater extent than others. Indeed, long-term shifts towards high streets which are more orientated to service provision than retail can be expected to continue. Research from Oxford University and Local Data Company (LDC[1]) shows that health & beauty services (nail salons, hairdressers & barbers, tattoo parlours) grew strongly by +10.4% in the period 2011-2013, while recent LDC figures for 2014 suggest that hair and beauty services, together with leisure services, such as coffee shops and restaurants, remain amongst the fastest growing categories of businesses on the high street.

1.5 More generally, the "experiential" side of the town centre journey – that is to say, social interaction, visits to cafes and cultural activities, together with the overall town centre atmosphere – heighten enjoyment, increase dwell time and spend in centres, and deter consumers from resorting to online alternatives.

1.6 The report "Successful Town Centres Developing Effective Strategies" (Association of Town and City Management, 2013) stated that: "*town centre performance thinking to date has been skewed towards the daytime economy, with little if any attention paid to the evening and night-time economies*." Indeed, the development of the evening economy of town centres and high streets can offer employment opportunities, possibilities for new ventures and can contribute to high street vitality after hours.

[1] http://thegreatbritishhighstreet.co.uk/pdf/GBHS-British-High-Streets-Crisis-to-Recovery.pdf

1.7 In order to respond to these various challenges and opportunities, there is a need for intervention. In its "Manifesto for Town and City Centres" (2014), ATCM recommended that: *"the Department for Business, Innovation & Skills insists that every LEP includes a statement regarding its support for each major town centre in its jurisdiction. This statement must outline how the LEP plans to work with existing town centre partnerships to ensure a joined up approach to economic development takes root in towns and cities across the country".*

1.8 In respect of the strategic context at LLEP level, the existing priorities of the Strategic Economic Plan (SEP) can be summarised as:

- Place – aiming to unlock key development sites and improve connectivity to enable efficient transport of people and goods. One of the two growth programmes mentioned is the Market Towns and Rural Leicestershire programme which will be a component of Growth Deal negotiations to secure infrastructure investment and the programme will focus on support for town centre regeneration.
- Businesses – designed to provide intensive support for SMEs and to accelerate growth of priority sectors, through a business support programme and sector-based support programme
- People – to ensure local people are equipped with the relevant skills that businesses need, as detailed in the growth area and priority sector skills plans

1.9 Table 2.6 in the SEP highlights retail as one of the top 5 employment sectors employing more than 41,600 people across the City and County. In the SWOT analysis for the LLEP area listed as a strength is the fact the area has a strong retail offer and retail expenditure is largely contained within the sub-region. Under each theme there are a number of objectives:

Place

- Lever in £1.584b of investment
- 70ha of land released
- 134,000sqm of employment space
- 10,700 businesses supported/new start ups
- 14,000 new homes
- 13,300 new jobs
- 170 apprenticeships
- 13.5m of cycleway
- 11.1km of highway improvements

Business

- Business support
- Support for growth
- Enhance innovation
- Knowledge transfer and innovation

People

- Enhancing skills
- Addressing skills shortages
- Reducing unemployment
- Retention and knowledge economy

1.10 In respect of each of the above, Leicestershire's market towns are especially well placed to do the following:

Place

- Lever in new investment
- Contribute to new employment space
- Host more business start ups
- Accommodate new homes
- Generate new jobs

Business

- Be the focus for dedicated business support
- Provide support for growth

People

- Enhancement of retail and hospitality skills
- Retention of local people and development of the knowledge economy

1.11 The European Structural and Investment Funds (ESIF) that have been allocated to LLEP cover a programming period from 2014-2020 it consists of ERDF, ESF and the EAFRD. Its priorities are:

- Innovation
- ICT
- SME Competitiveness
- Low carbon
- Employment
- Social Inclusion
- Skills Development
- Rural Economy

1.12 The LEP has identified eight key sectors in Leicester/Leicestershire which will support the delivery of the aims and objectives outlined in the SEP and ESIF Strategies. Growth Plan has been produced for each of the following sectors:

- Food and drink manufacturing
- Textiles
- Logistics and distribution
- Tourism and hospitality
- Creative industries
- Low carbon
- Professional and financial
- Engineering and advanced manufacturing

1.13 In respect of current sector priorities, the area common to all market towns is tourism and hospitality. In addition, specific towns have strengths and potential in respect of other sector priorities, including food and drink manufacturing, creative industries and professional/financial services.

Food and Drink Sector Growth Plan

1.14 It is estimated that sales of local food and drink totalled £10 billion across England in 2013 and tourism accounts for £2.6 billion of this.[2]

1.15 Benefits of a localised food and drink offer have helped to assist regeneration in other locations and could be replicated in Leicestershire. Examples exist of increased number and quality of restaurants, and food and drink establishments working collaboratively with each other, thereby helping to encourage new mixed use developments. This then increases the volume and value of tourism and creates new jobs.

1.16 There is also evidence that localised food and drink offers can develop and enhance cultural identity and instil community pride and sense of place. Melton Mowbray is the only town centre that tries this approach. There is a need to introduce measures to promote a Leicestershire brand, not just for Food and Drink, but linked to the identity of our Market Towns.

1.17 An opportunity exists to build on the Farmers Markets held in market towns across the County, particularly in Melton Mowbray if linked to the weekly cattle market. As an example, the monthly Bakewell Farmers Market attracts up to 50 stall holders, generating a combined turnover of £810,000 per year. Only 10% of customers live locally, suggesting benefits accrue to other retail ad hospitality businesses form the influx of visitors. There is also an opportunity to develop and revitalise existing weekly markets possibly by employing a county wide officer.

1.18 There is potential to use food festivals as a means of raising awareness of local producers and delivering economic impacts by extending the tourism season and attracting additional visitors. Supplier directories, could incentivise purchases of local food and drink and through restaurant trails and encouraging local food stores to stock local products. Melton Mowbray is already successfully doing this with its Artisan Cheese Fair, Pie Festival and annual Food and Drink festival and Market Harborough have produced a local food map through the Sustainable Harborough initiative and there is scope for similar initiatives in other market towns.

Creative Industries Sector Growth Plan

1.19 Across Leicestershire, around 8,000 people work in the creative industries, one third of them employed in tourism-related activities. Whilst one third of these jobs are in Leicester, the other two thirds are spread across the County, with Market Harborough having the largest concentration, followed by Charnwood (in and around Loughborough) and Hinckley (with creative hubs such as the Atkins building).

---

[2] "Rural tourism and local food and drink" (Oct 2015), DEFRA

1.20 There are 455 active digital technology companies in Leicester and Leicestershire, with the highest concentrations in Leicester and Loughborough. These are mainly sole traders, with less than 1% employing more than 50 people.

1.21 Design is the second most popular sub-sector, employing 1,100 people, with concentrations of activity at Loughborough Technology Park and in Melton Mowbray. There are concentrations of advertising and marketing companies in Lutterworth, for example.

1.22 A key project is to develop a Creative Quarters Agency for Leicester and Leicestershire linking with the University of Loughborough and Atkins Building in Hinckley. Another proposed project is to celebrate a Leicestershire Design Festival to showcase commercial and creative businesses which could be hosted in the County’s market towns. Loughborough Generator creative hub project is specifically mentioned and there is a need to grow hubs in town centres, building on existing ones, such as the Atkins Building in Hinckley or creating new ones which could link to the proposed key sites officer and the development of business accommodation on vacant/derelict sites

Textiles Sector Growth Plan

1.23 Textiles were at the heart of Leicester and Leicestershire’s economic development, throughout the 19th and 20th centuries, with a specialism in knitwear and hosiery. In 1971, 65,000 people were employed in textile manufacturing, accounting for just over a fifth of all employment in the County. Today that figure is 10,000. There is heavy clustering of textile manufacturing firms around Leicester City but there is a significant presence around Hinckley, as well as activity in Market Harborough, Lutterworth and Loughborough.

1.24 Many of the larger factories have been converted into housing in towns such as Earl Shilton and the skills of the workforce have been lost. Many clothing headquarters are located in the County even if manufacturing has reduced, for example Joules in Market Harborough, Nutmeg (Morrisons Clothing brand) in Coalville, George at Magna Park near Lutterworth and Next at Enderby. The action plan states that greater retail links need to be made and this sector could be used to brand some of the Market Towns in the same way that Food and Drink is used in Melton Mowbray and Hinckley is Home of Triumph.

Tourism and Hospitality Growth Plan

1.25 There is a need to develop the County’s cultural assets and iconic buildings and attractions, many of which are in Leicestershire’s Market Towns. In order to fully exploit business opportunities, this report highlights the need to Increase digital skills and capability of businesses, which also links to the proposed Digital project for the town centres.

1.26 Linked to the Food and Drink sector growth plan there is a need to develop distinct local products and experiences.

1.27 The report highlights a need to sell the destination, its offer and its businesses to large numbers of people in key geographical areas again demonstrating the clear link with the Market Towns.

1.28 Transport was highlighted as an issue, with congestion and pinch points often in Town Centres and the report states that a lack of coach parking needs to be addressed. This is particularly an issue in Market Harborough.

1.29 The report highlights that Tourism supports indirect job creation, especially in retail and hospitality, and there is a need to improve smaller scale visitor sites (cultural, heritage and leisure) many of which are in Market Towns, such as Melton Museum and the Carillion in Loughborough

Transport

1.30 The issue of connectivity between towns (and elsewhere) is something of a double-edged sword. Better road and rail links to each town may well bring in more spending but could also facilitate greater leakage of expenditure. Nevertheless, it is noted that Midlands Connect (the transport element of the Midlands Engine for Growth) could represent an opportunity to utilise some Market Towns as transport hubs.

Market Towns Profile

1.31 The combined economic value of the town centres that feature in this report is around £1.1 billion. There are no exact equivalents for Leicester City Centre and Fosse Park, but the estimated turnover of retail businesses at each location is £783 million and £474 million respectively, which converts to Gross Value Added (GVA) of £168 million and £102 million respectively. This underlines the economic importance of Leicestershire’s market towns and indicates that relatively modest economic growth in percentage terms could deliver significant economic benefits in absolute terms. Furthermore, the renaissance of Leicester City Centre, leading to the attraction of substantial private sector investment from John Lewis amongst others, was in part catalysed by significant public sector investment in improving the public realm. This principle is likely to hold for Leicestershire’s market towns just as much as it does for its primary city.

1.32 The table below summarises the split of activities within each town centre in percentage terms.

Table 1.1:Town Centre Retail and Service Composition

	Convenience	Comparison	Service	Misc.	Vacant
Ashby	8.4%	47.3%	34.1%	1.8%	8.4%
Blaby	11.5%	24%	58.3%	4.2%	2.1%
Coalville	8.5%	38.3%	41%	1.6%	10.6%
Earl Shilton & Barwell	n/a	n/a	n/a	n/a	n/a
Hinckley	6.5%	45.5%	36.0%	1.8%	10.2%
Loughborough	7.8%	40.4%	35.3%	1.0%	15.5%
Lutterworth	9.0%	43.8%	39.3%	0.0%	7.9%
Market Harborough	8.6%	52.1%	35.4%	0.1%	3.2%
Melton Mowbray	7.0%	30.9%	50.3%	2.2%	9.6%
Shepshed	8.6%	35.7%	44.3%	5.7%	5.7%
Wigston	14.4%	50.0%	32.6%	0.0%	3.0%
UK Average (%)	9.2%	39.8%	37.4%	1.2%	12.4%

Source: Experian Goad (October 2014) / 2015 UK Average (Experian Goad)

1.33 In some locations – mainly those with a Business Improvement District (BID) - additional information is available on the breakdown of service businesses:

- Blaby - of the 56 services occupiers, just over one third are personal services, almost exactly one third are business/financial services and just under one third are hospitality/leisure services.
- Hinckley - of the 230 services occupiers, just over half are business/financial services, just under one third are hospitality/leisure services and around one fifth are personal services.
- Loughborough – has 54 business/financial services businesses in the town centre, more than one third of which are estate agents
- Melton Mowbray - of the 99 services occupiers, two thirds are hospitality/leisure services and one-third business/financial services (no information was available in respect of personal services).

1.34 The total amount of town centre units in each town centre is summarised below.

Table 1.2:Town Centre Units					
	Convenience	Comparison	Service	Misc.	Vacant
Ashby	14	79	57	3	14
Blaby	11	23	56	4	2
Coalville	16	72	77	3	20
Earl Shilton & Barwell	n/a	n/a	n/a	n/a	n/a
Hinckley	18	125	99	5	28
Loughborough	31	161	141	4	62
Lutterworth	8	39	35		7
Market Harborough	24	146	99	2	9
Melton Mowbray	22	97	158	7	30
Shepshed	6	25	31	4	4
Wigston	19	66	43		4
Source: Town Centre Studies / 2015 UK Average (Experian Goad)					

1.35 In addition, six town centres have data on the total amount of floorspace available:

Table 1.3: Town Centre Floorspace			
	Convenience (sq.m.)	Comparison (sq.m.)	Service (sq.m.)
Ashby[3]	1518 gross (7.6%)	9430 gross (47.2%)	7532 gross (37.7%)
Blaby[4]	3140 gross (28.3%)	2780 gross (25.0%)	5110 gross (46.0%)
Coalville[5]	3008 gross (7.3%)	15450 gross (37.5%)	15244 gross (37.0%)
Lutterworth[6]	3291 net (56.8%)	2502 net (43.2%)	-
Market Harborough[7]	8474 net (34.5%)	1,118 net 65.5%)	-
Wigston[8]	7372 gross (19.0%)	15,821 gross (60.7%)	4915 gross (17.9%)

[3] Ibid
[4] Blaby Town Centre and Retail Study (2015)
[5] NWL Retail Study (2012)
[6] Ibid
[7] Harborough Retail Study (2013)
[8] Oadby and Wigston Retail Capacity Study (2008)

1.36 Naturally, each town centre has its own characteristics. Notwithstanding the fact that this is inevitably open to individual interpretation, the sense of each place that has emerged from this study in the opinion of ERS, is summarised as follows:

- Ashby – an attractive built environment with a good range of shops and eateries and with potential to improve its visitor offer by broadening its leisure, hospitality and accommodation offer.
- Blaby – a pleasant town, the traditional role of which has been undermined by ready access to Leicester City Centre and Fosse Park, and which is in need of carving out its own niche.
- Coalville – a town with great potential but requiring substantial investment in order to achieve it, which will need to be public-sector led.
- Earl Shilton/Barwell – serving a very local market and not doing that to the extent they might, but with new opportunities arising from significant new housing development. Both have reasonably attractive built environments as well as valuable community assets.
- Hinckley – a sizeable and growing town recently benefiting from significant new commercial development that provides facilities that a town of this size merits. The town appears to have significant further potential yet to be realised.
- Loughborough – more a small city than a town, it serves a reasonable catchment as well as a sizeable local population.
- Lutterworth – a very pleasant small town, with potential for further development as a local retail and service sector as well as a visitor destination.
- Market Harborough – the town to which other market towns in Leicestershire aspire; visually attractive good range and quality of retail and eateries with a wide range of independents and hospitality options, serving an affluent local market and a catchment of visitors from further afield.
- Melton Mowbray – an established brand that has potential to exploit this more fully through a broadening of its offer and by raising quality standards across the town, in terms of the management of the built environment and the retail and hospitality offer.
- Shepshed – very much on the shadow of Loughborough and in danger of becoming a dormitory town with a minimal local serve offer unless it can find its niche and play to these strengths.
- Wigston – the town boasts a number of positives, including its more historic parts and the high proportion of independent stores, but needs further enhancements to the built environment and higher quality retail and services offers.

2. METHODOLOGY

2.1 The study commenced with an inception meeting involving the Study Director and representatives of the County Council and Borough/District Councils. This provided an additional background briefing on the motivations for commissioning the study and on each of the market towns in question.

2.2 Thereafter, the methodology underpinning this research comprised the following elements:

- Review of existing documents
- Review of existing data
- Meeting with LLEP representatives
- Focus group discussions with strategic stakeholders in each of the market towns
- Focus group discussions with businesses in each of the market towns

Review of Documents

2.3 ERS staff liaised with representatives of the County Council and Borough/District Councils in order to obtain copies of all relevant documents (neighbourhood plans, local plans, strategy documents, funding applications etc.). In respect of relevant documents published by LLEP, these were obtained via the LLEP website.

2.4 The purpose of the document review was to provide the strategic context pertaining to each of the towns and to identify issues that might prompt the development of potential projects as well as capture any existing project ideas.

Review of Data

2.5 The data review covered relevant statistics collated by the Research and Insight Team at Leicestershire County Council. Much of this data (profiles of each of the Boroughs/Districts is published in a companion document to this report.

2.6 Town centre areas were defined at 2011 Census Output area in consultation with each District Council. Town Centre boundaries were provided by District Councils and mapped against Census Output Areas to facilitate the collection of Census 2011 data for each town.

2.7 The Indices of Multiple Deprivation are based on 37 separate indicators, organised across seven distinct domains of deprivation. These domains are weighted and combined to provide the Index of Multiple Deprivation (IMD). IMD scores are for each town centre are presented in deciles with the lower the number (between 1 and 10) indicating the higher the level of deprivation (where there is more than one score, this is due to the town centre covering more than one area).

Meeting with LLEP representatives

2.8 The Study Director met with LLEP representatives in order to explore their support for market town-based initiatives and the types of projects most likely to be supported. It was apparent that a forthcoming review of their Strategic Economic Plan (SEP) meant that funding priorities were being reassessed. Positively, it was suggested that the findings of this study may help to shape those funding priorities, which could mean that going forward market towns are better placed to secure LLEP funding.

Focus Groups

2.9 Focus Groups were staged in each of the market towns with the aims of: clarifying whether or not projects identified as part of the policy reviews are still relevant; providing opportunities for participants to suggest any additional projects; and informing the development of projects by the consultancy team. Further information on attendance at each session can be found in Appendix 1.

Stakeholders

2.10 Stakeholders who participated included Town Centre Managers, Business Improvement District Managers, Town Clerks, Town Team members, Economic Development Officers, Planners, Elected Members and various other local interests (e.g. the university in Loughborough). Almost all of these discussions took place in December 2015.

Businesses

2.11 Business Focus Groups were undertaken in January 2016 to avoid a clash with many retailers' busiest period in the run up to Christmas. Most were lively and well attended by a good cross-section of interests (Lutterworth was less well attended.)

2.12 In total, around 90 businesses took part in these focus group sessions. As such, it is not suggested that they will have been wholly representative of local business populations, but they did cover a variety of retail, hospitality and professional services firms, including multiples and independents.

Analysis

Retail Assessment

2.13 In order to estimate current levels of available retail expenditure available to each centre we have used the Local Authorities' existing evidence base to define a Primary Catchment Area (PCA) for each centre. We have then drawn upon underlying household survey data to analyse expenditure flows within the PCA in terms of that currently drawn to the subject centres but also in terms of leakage to competing retail destinations. This is intended to present a 'baseline position' and does not consider the potential for new development or other improvement measures to influence shopping patterns moving forwards.

2.14 We have adopted the following staged approach:

- Step 1: define a Primary Catchment Area having regard to household survey evidence of current shopping patterns;
- Step 2: Quantify population and spending for convenience and comparison goods having regard to appropriate growth factors and making deductions for Special Forms of Trading (SFT) (see Table X below);
- Step 3: Apply household survey derived market shares to the available expenditure within the PCA at 2016 (individually for convenience and comparison goods) to quantify a centre's trade draw within the defined PCA and, where relevant, quantify the leakage of trade from the PCA to other competing retail destinations.

2.15 With regard to the PCA, these are defined based on the retail evidence base available and therefore varies from centre to centre. The amount of trade each centre captures within its defined PCA is based on survey evidence where this is available and details of this is set out within the 'Current Shopping Patterns' section within each of the town centre chapters.

2.16 In calculating future retail expenditure within the survey area, we have applied the latest long-term growth rates identified by Pitney Bowes (Retail Expenditure Guide, August 2015). We have also made deductions for special forms of trading (SFT) which represents expenditure not available to spend in shops (i.e. internet shopping) based on the most up to date estimates published by Pitney Bowes. The deductions for SFT are made at 2016 only. There is no allowance factored in for this to change over time.

Table 2.1: Growth Assumptions

	Convenience Goods	Comparison Goods
Expenditure Growth based on Ultra Long Term rate	0.5% pa	5.1% pa
Deductions for SFT at 2016	2.9%	19%

Source: Pitney Bowes Retail Expenditure Guide, August 2015

Economic Assessment

2.17 In order to capture the value of economic value in the town centres employment figures for each town were taken from Census 2011 data Workplace Zone data. Town Centre boundaries were first provided by District Councils. These boundaries were then mapped against Census Workplace Zones (as opposed to areas) to facilitate the collection of Census 2011 data for each town.

2.18 ONS data was used to calculate the GVA associated with employment in the town centre. Specifically, Regional GVA figures[9] published by ONS were converted to GVA per worker[10] using BRES employment figures[11]. Totals were calculated using 2014 figures and converted into 2015 prices using the annual CPI inflation figures.

Project Development

2.19 At the outset of the study it was anticipated that project outlines would be developed with a view to determining which might go forward as candidates for LLEP (or other) funding. More than 100 town-specific projects have been identified, in addition to which County-wide projects have been defined. The final section of this report focuses on County-wide initiatives. We have attempted to give some indication of the prospective contribution of these projects to the future economic wellbeing of the market towns in question and, insofar as it can be determined at present, their contribution to the ambitions of LLEP.

[9] Specifically those calculated via the Income Approach.
[10] Including both employees and working proprietors.
[11] The Sector figure for 'Real estate activities' was the exception to this process, with the GVA figure sourced from the Annual Business Survey (also published by ONS). This reason for this approach is to exclude 'inputted rent' (the economic activity associated with the production and consumption of housing services by home owners who live in their own home) from calculations.

3. ASHBY-DE-LA-ZOUCH

Overview

3.1 Ashby-de-la-Zouch is an historic market town and key service centre within The National Forest, located in North West Leicestershire. Ashby enjoys good road transport access and lies just beyond the junction of the A511 and A42, providing fast links to Leicester, Burton, Nottingham, Tamworth and slightly further afield, Birmingham. East Midlands airport is just nine miles away.

3.2 The economic outlook for Ashby is positive and prosperous. The town centre is historic, attractive and bustling with many notable buildings and churches. It is considered an attractive place to establish and expand business activity, namely due to its strategic location, visual setting and business offering, including modern units and industrial parks. It is also a sought-after housing location, which puts much pressure on land use and raises affordability issues for local people. Indeed, Ashby is considered the 8th most popular British Market town (Daily Telegraph 2015) as measured by its rising house prices, with one of the largest (23 per cent) rises in house prices since 2008 in the country.

3.3 Nevertheless, consultations for this research raised concerns regarding the town centre economy, including the potential threat of out-of-town employment and retail sites to town centre activity and a failure of the transport system to meet the needs of a modern town. Furthermore, despite the significant business presence in Ashby, many residents struggle to find work locally and hence commute elsewhere, including East Midlands Airport and Donington Park. Many professionals opt to travel significant distances to their employment as they desire to live in Ashby and the good road links make this possible.

Town Centre Population

3.4 The town centre serves a significant residential purpose in addition to retail and service provision, with 746 people living there. Ashby town centre has an economic activity rate (77.2%) above the regional (63.1%) and GB (63.3%) counterpart statistics and noteworthy is the reasonably high level of self-employed (10.9%). The major reason for economic inactivity is retirement (13.5%), no doubt reflecting the visually attractive nature of Ashby and its retail and cultural offer.

Table 3.1: Ashby Town Centre – Population				
	Town Centre		LEP	GB
	No.	%	%	%
All usual residents 16-64	746	100.0%	100.0	100.0
Economically active	576	77.2%	63.1%	63.3%
Employed	453	60.7%	48.0%	47.4%
Self employed	81	10.9%	7.8%	8.9%
Unemployed	25	3.4%	2.7%	2.4%
Full Time Student	17	2.3%	4.6%	4.7%
Economically Inactive	170	22.8%	36.9%	36.7%
Retired	101	13.5%	20.5%	21.4%
Student	17	2.3%	7.2%	5.3%
Looking after home / family	25	3.4%	3.9%	3.9%
LT Sick / Disabled	16	2.1%	3.3%	3.9%
Other	11	1.5%	2.1%	2.2%
Source: Census Data, 2011				

Indices of Deprivation

3.5 Ashby town centre is covered by several areas and so registers IMD scores for each of them. Two of the three areas of Ashby Town centre consistently register very high scores (with the exception of Crime), reflecting low levels of deprivation. All areas score well on Living Environment.

Table 3.2: Ashby Indices of Deprivation		
Deprivation Domain	National Decile (1 most deprived)	Leicestershire Rank (1 most deprived)
Overall	9, 9, 5	302, 292, 78
Income	10, 9, 4	348, 281, 61
Employment	10, 9, 4	365, 279, 56
Education, Skills and Training	10, 9, 5	394, 341, 125
Health and Disability	8, 8, 5	193, 223, 47
Crime	4, 4, 5	68, 80, 103
Barriers to Housing and Services	5, 7, 9	105, 176, 275
Living Environment	8, 9, 9	228, 281, 282
Source: English Indices of Deprivation (2015)		

Work Day Population

3.6 Table 3.3 below highlights the occupations of Ashby's workday population. In many respects the town centre work day population in Ashby is very similar to that of Coalville, also within the North West Leicestershire district. The percentage of individuals working in Lower managerial positions in Ashby (26.6%) is more than double that of the LLEP and 5.8 percentage points above the England and Wales comparator. However, it is noted that outside of the town centre, there is a much higher percentage of people in higher managerial occupations, whose spending power has the ability to be of benefit to the town centre.

Table 3.3: Town Centre Work Day Population in Ashby

Occupation	Ashby	LLEP	England and Wales
Higher managerial, administrative and professional occupations	8.4%	9.0%	10.2%
Lower managerial, administrative and professional occupations	26.6%	11.2%	20.8%
Intermediate occupations	13.1%	12.4%	12,8%
Small employers and own account workers	7.9%	8.5%	9.4%
Lower supervisory and technical occupations	6.1%	7.1%	6.9%
Semi-routine occupations	22.0%	14.2%	14.1%
Routine occupations	9.2%	13.6%	11.1%
Never worked and long-term unemployed	1.0%	5.5%	5.6%
Total Number	2,441	724,309	41.0m
Source: Annual Population Survey (2015)			

Economic Value of the Town Centre

3.7 Ashby's town centre has a GVA of £83.5m, which amounts to 7.9% of the total GVA for all of the market towns included in this study. There are more than 2,100 people employed in the town centre. Average GVA per worker is £39,347 which is around 7% below the County-wide average.

Table 3.4: Value of Town Centre Economic Activity in Ashby

	Workers	GVA £m	Proportion
Ashby	2,121	83.5	7.9%
Total	**25,197**	**1,061**	**100.0%**
Source: ONS figures and ERS analysis			

Strategic Context

3.8 Ashby-de-la-Zouch Town Council is currently developing a **Neighbourhood Plan** which provides a community led approach for steering future development and growth in Ashby for 2016-2031.

3.9 The Neighbourhood Plan describes the following vision:

> *"Ashby de la Zouch is a prosperous, attractive and historic market town at the heart of the National Forest. Our vision is to build on that uniqueness and create a town that meets the needs of local people whilst making the most of its special qualities to attract visitors and shoppers from further afield.*
> *This will be achieved by the Plan's vision and objectives providing an aspirational and positive planning framework to deliver housing and economic development to meet local and District-wide needs and thereby creating a safe, clean, accessible and attractive town and countryside in which people can shop, work, live and pursue their leisure activities. The Neighbourhood Plan, in addition to proposing improvements in housing, employment and economic growth, transport, education and well-being, and encouraging developer contributions, also emphasises the importance of town centre developments in creating a sustainable Ashby."*

3.10 Specific policy developed in the Neighbourhood Plan with regard to the Town Centre and informed by community consultations, concerns Town Centre Attractiveness, the Primary Shopping Area within the town, Shop Fronts, Residential Development, Tourism and Signage.

Town Centre Attractiveness

3.11 Community consultations identified that safeguarding the attractiveness, vitality and functionality of the town centre was a top priority. Development proposals for retail, services, leisure and tourism will be expected to be located within the Town Centre and be of a scale, design and character that is in-keeping with Ashby. Furthermore, development should serve to protect and enhance the town's built and historic assets and not lead to any over concentration of use such as hot food takeaways which might adversely impact on the town centre, its role and mix of amenities.

Primary Shopping Area

3.12 The Neighbourhood Plan proposes to designate a Primary Shopping Area within the Town Centre Boundary which will support the development of new retail development. At present the largest concentrations of retail shopping in Ashby are along Market Street, in the Market Hall, along Bath Street, Bath Street Corner and parts of Derby Road and Brook Street.

Shop Fronts

3.13 In light of concerns regarding the declining appearance of shops and businesses in the town centre, support will be given (by the Town Council) to shop front developments which conserve, enhance and upgrade the design and character of shop fronts and which are in-keeping with the local aesthetics.

Residential Development

3.14 Proposals to encourage a more mixed-use of the town centre will be supported; in particular, the development of second floor town centre premises for residential use, providing they do not adversely affect existing ground floor retail.

Tourism

3.15 In spite of all that Ashby has to offer (Tourist Information Centre, Museum, Castle, Park, Tea Shop, Public Toilets and pleasant shopping environment), the Neighbourhood Plan suggests that there is a shortage of tourist facilities within the town centre relative to Ashby's rich heritage. Support will therefore be provided to proposed tourism facilities providing they are in keeping with the character of the town centre, both in terms of offer and design, and that the development is outside what the Plan considers to be the Primary Shopping Area.

3.16 NWLDC is currently developing a **Local Plan** to cover the entire district which is anticipated to be adopted in **September 2017.** The plan presents how much housing and employment development is required in Ashby, Coalville and other centres in the district, up until 2031.

3.17 The emerging **Local Plan** has outlined 15 objectives which will shape the development plans in the district. In light of a proposal to develop a Strategic Rail Freight Interchange (SFRI) near to East Midlands Airport and hence the possible need to accommodate new workers to the area, an increased district level housing of 10,700 dwellings will be required between 2011-2031 (or 535 a year). Several sites have secured, or are in the process of securing, planning permission in contribution towards the districts housing targets and overarching the Local Plan. One such site is Money Hill, north of Ashby – de – la –Zouch which will provide 1750 dwellings (of which 550 have been granted planning permission) to meet the current and planned housing development in the district relative to the target in the time period set (2011-2031) It is an additional site identified to meet the shortfall of current and planned housing development in the district relative to the target in the time period set (2011-2031).

3.18 Town centre issues raised in the **Local Plan** reaffirm views expressed in the **Neighbourhood Plan** concerning the clustering of hot food takeaways, litter, waste disposal, traffic, safety and both environmental and noise pollution. In order to avoid further clustering activity, the Council has proposed to resist applications for new hot food takeaways within the Market Street Frontage commencing 2017 when the Local Plan is adopted.

3.19 Current discussions regarding the reopening of the Leicester to Burton railway line which would reinstate Ashby's train station could have wide-ranging impacts on the town centre and the local economy. The line, already operating for freight transportation has been the subject of much review (May 2015), including a feasibility study carried out by LCC and there is potential for the line to provide direct train links to London. However, costs are believed to be prohibitive, although the scheme may be re-visited at a later date.

Progress towards strategic objectives

3.20 Stakeholders emphasised that nothing had come forward regarding the shop front improvement scheme, however given the Neighbourhood Plan is still in the development stages, this is not to suggest that progress with not be forthcoming. Consultees noted the absence of any long term strategic role or development of Ashby's extensive 76 acres of public open space, which could be greater capitalised on to promote vibrancy and vitality in the town.

3.21 Despite the many benefits that reinstating Ashby's train station could bring, including supporting day visitors who are drawn to the town's heritage assets; there was scepticism amongst consultees as to how feasible this is. The possibility of a new rail link may serve to reinforce trends that Ashby has become a commuter town for white collar workers, whilst the local industrial base continues to decline.

Retail Offer

Retail Composition

3.22 Drawing on the most recent survey undertaken by Experian Goad (October 2014), the town centre comprises approximately 167 retail units. Retail uses in the centre are largely concentrated on and around Market Street, Derby Road and Bath Street being the principal streets.

3.23 The centre's convenience goods offer comprises a total of 14 units. This is broadly in line with the national average and represents 'no change' from that recorded by Experian Goad in December 2010. Closer analysis reveals a reasonable range of outlets, including a bakery, a butchers, a greengrocers and grocery stores within this goods category, with the Co-op on Derby Road being a key convenience anchor.

Table 3.5:Ashby de la Zouch Town Centre Retail Composition

Retail Category	No. Units	% of Total	UK Average (%)	Variance
Convenience	14	8.4%	9.2%	-0.8%
Comparison	79	47.3%	39.8%	+7.5%
Service	57	34.1%	37.4%	-3.3%
Vacant	14	8.4%	12.4%	-4.0%
Miscellaneous	3	1.8%	1.2%	+0.6%
TOTAL	**167**	**100%**	**100%**	**-**

Source: Experian Goad (October 2014) / 2015 UK Average (Experian Goad)

3.24 The centre has a strong comparison retail offer comprising 79 units which equates nearly half of all units in the town centre and exceeds the national average by +7.5%. This is consistent with the position recorded by Experian Goad in December 2010 and shows a good level of resilience following the recession. However, this may be linked to the number of independent operators compared to multiples and that those multiples present are typically orientated towards the middle/lower end of the retail spectrum which have fared better in recent times.

3.25 Closer analysis indicates a reasonable mix of comparison stores with representation across the majority of comparison goods sub-categories, the only exception being ‘variety, department and catalogue’. This includes many high end clothes and gift shops compared to many other Leicestershire Market Towns.

3.26 Service uses represent just over a third of all units and whilst below average, this is balanced by the strong comparison offer and by no means a negative indicator. Closer analysis identifies representation across all sub-categories within the service sector with a notable number of units within the ‘restaurant, cafés, fast food’ (22 units) and ‘hairdressing, beauty and health’ (17 units) sub-categories, although the former is below average and could be further enhanced.

3.27 Whilst there has been an increase of five vacant units since 2010, the centre’s vacancy rate remains well below the national average (-4%).

3.28 Overall, the retail composition of Ashby de la Zouch indicates that the centre provides a good diversity of uses, which enable people’s day to day shopping needs to be met. The centre has above average representation from comparison retailers, which is underpinned by a number of independent and specialist retailers and is less reliant on multiples. Whilst the vacancy rate remains below average, there has been an increase in vacant units since 2010 and this should be closely monitored moving forwards. In addition, there are at least 7 charity shops, although some attract people from a wide area, such as the specialist St Giles Hospice Book Shop.

Available Retail Expenditure

3.29 Having regard to the results of the household survey of shopping patterns underpinning the North West Leicestershire Retail Study (2015), we have defined the primary catchment area (PCA) for Ashby de la Zouch as comprising the following Local Authority Wards: Ashby Castle; Ashby Holywell; Ashby Ivanhoe and Moira.

3.30 Population estimates and forecasts for the PCA have been drawn from the Pitney Bowes GeoInsight database. This provides estimates of population based on projections and the 2011 census for small, localised areas. Overall the population within the PCA is currently 18,268. This is forecast to grow to 19,064 by 2021 and to 19,794 by 2026. This equates to an overall projected growth of 8.4% over the next 10 years.

3.31 Total available expenditure in the survey area in forecast years is a product of both population change and spending growth applying these trend-based projections. The outputs of this analysis in terms of available 'retail' expenditure, is set out within Table 3.6 below.

Table 3.6: Forecast Available Retail Expenditure within Ashby de la Zouch PCA			
Year	Convenience Goods	Comparison Goods	Total Available Retail Expenditure
2016	£35.1m	£57.4m	£95.2m
2021	£37.6m	£76.8m	£114.4m
2026	£40.0m	£102.3m	£142.3m
% Growth '16-'26	13.9%	78.2%	53.8%
Source: Turley (2015)			

Current Shopping Patterns

3.32 Not all available expenditure generated within the PCA will be spent within Ashby de la Zouch town centre. Indeed, the results of the household survey (October 2012), which underpins the North West Leicestershire Retail Study (2015), indicates that the town centre retains approximately 20% of convenience goods expenditure (£7.2m) generated within the PCA and approximately 23% of comparison goods expenditure (£13.0m).

3.33 Adopting this as the baseline position, the level of retail expenditure attracted to the town centre is in the order of £20.2m at 2016, equating to a market share within the PCA of 22%. This compares to a combined market share of 24% (£21.8m) currently drawn to out of centre retail facilities situated to the east of the town centre including Tesco, Resolution Road and retail warehousing around Dents Road[12].

3.34 Overall, this implies that 55% of retail expenditure is currently drawn to other centres/retail destinations beyond Ashby de la Zouch and its immediate surroundings. This 'leakage' is largely attributed to comparison goods which is not unusual given the proximity of higher order centres such as Leicester, Burton on Trent and Derby which collectively attract just under 30% of comparison goods expenditure from within the PCA.

[12] This does not take into account additional expenditure which is likely to be drawn to the new Aldi, Nottingham Road which opened in September 2013.

Local Perceptions of retail on potential for improvement

3.35 Attitudinal questions were asked as part of the household survey, which explored the extent of potential areas for improvement within the town centre.

Table 3.7: Suggested Improvements

Improvement	Proportion of Respondents
No improvements needed	48%
Better choice of shops (general)	10%
More parking provision (not enough parking)	9%
Free parking	6%
More clothes/fashion shops	6%
Specific shop missing from town centre	4%
Fewer empty shops/vacancies	3%
More independent shops	3%
Fewer takeaway shops	3%
Fewer charity shops	3%
Source: North West Leicestershire Household Survey (November 2012)	

3.36 This indicates a generally good level of satisfaction with the current offer in the town centre and any further improvements in line with the above would only serve to reinforce this.

Summary

3.37 Ashby-de-la-Zouch is performing relatively well in terms of its role as a rural town centre. The centre has a good comparison retail offer, underpinned by a strong independent sector which should be supported and, where possible, enhanced. There is scope to enhance the centre's offer in terms of its service provision, particularly restaurants and cafes, which are increasingly sought to complement the overall shopping experience and will help to increase dwell times.

3.38 Town centre economic activity is high, however, there is concern that much of this outlook is contingent upon a growing commuter population. Indeed, whether the large scale forthcoming housing development north of Ashby contributes to this growing trend of working elsewhere or whether it propels the creation of new business and employment opportunities in the town remains to be seen. Decisions and projects taken now and in the immediate future have the potential to shape this outcome. The town centre economy supports above regional and national average levels of Lower Managerial and Semi-routine occupations suggesting the town centre supports a reasonable mix of employment opportunities. The three wards which cover Ashby all have a higher percentage of workers classified as Managers, & Senior Officers; Professional and Associate Professional and Technical than the Leicestershire and national average.

3.39 Plans to develop a site just North of Ashby with an additional 1750 homes (including Money Hill 605; Arla Dairy 153; Holywell Farm 400 homes) could see the town's population increase markedly, from around 10,000 to around 15,000. This forthcoming housing will be good for footfall, trade and town centre activity, although businesses highlight that accommodating the increasing demands for public services will need to be addressed to ensure the benefits of this opportunity can be maximised. Some consultees felt that the development could pose a threat to the community feel and will simply contribute to Ashby's role as a commuter, not working town.

3.40 There is a perception that more could be done towards improving the tourism offer in Ashby and this represents a significant opportunity to develop employment locally. Such developments could focus on the town's strategic location in the National Forest Trail as well as its historical and heritage assets. Whilst, the Castle is regarded as a great asset for the town, there is a degree of frustration that English Heritage does not make more of it. Furthermore, the town is thought to suffer from not having a good quality hotel and developing this accommodation offer, (beyond the existing Royal Hotel and Premier Inn and adding value to the visitor experience may represent a worthwhile future opportunity to pursue. Indeed, it is understood that some visitors are encouraged to look for hotel accommodation in nearby Castle Donington.

SWOT Analysis

Strengths	Weaknesses
• Very low High Street vacancy rate • Rich in heritage assets, including the Ancient Monument of Ashby de la Zouch castle, and Ashby's central location in the National Forest • Sense of community engagement, spirit and pride in the town, its development and events • Many independent traders • Extensive green space • High level of economic activity	• Draw of Tamworth on both the day-time and evening economy of Ashby • Car parking charges and the lack of free parking acts as a potential deterrent to locals and outsiders visiting the town centre • Under-developed tourism offer • Lack of good quality hotel(s) • Narrowing employment and industrial base in Ashby • Concern surrounding crime • Significant number of charity shops?
Opportunities	**Threats**
• To make more of the heritage tourism offer and supporting tourism infrastructure, including accommodation • Develop further the evening economy will encourage residents to stay local as oppose to visiting nearby Tamworth and also serve to encourage extended visitor stays, promoting overnight trips as oppose day trips • Large scale housing development could present many opportunities to bring investment, businesses, trade, footfall and employment opportunities to the town • To improve businesses, stakeholder and community communications to ensure participation and support of towns activities continues and that enthusiasm doesn't wane • To establish Ashby as a place to do business and expand the business community that does already exist in Ashby • Reinstating Ashby train station	• There are concerns that population growth on top of limited infrastructure (notably car parking and transport infrastructure) will result in the town centre becoming extremely congested. • Concern that Ashby's positive outlook is propped up by a strong commuter population and that local employment opportunities are scarce and falling • Mixed interpretations regarding the impact that the large scale housing development North of Ashby will have on the town, its community feel and economic future

Potential Projects

3.41 Each of the below are regarded as potentially viable projects, albeit it has not been possible to determine potential costs or the likelihood of securing funding. These projects are aimed at recapturing some existing resident spending, capturing a good proportion of the spending of those who will move into new homes being built in the area and generating higher levels of visitor spending.

3.42 Whilst it is impossible to predict the impact any of these projects might have, a measure of the potential return on investment is that if by 2021 the percentage of retail expenditure currently drawn to other centres/retail destinations could be reduced by one tenth (from 55.0% to 49.5%), this would generate an **additional £6.3 million** of retail expenditure each year.

Digital Projects

This would comprise:

- a dedicated town centre website, linked to websites for other Leicestershire market towns. It is noted that there is already a Town Council website (which includes some information on businesses and the town's facilities) and Ashby Online (which lists some local independent businesses/shops) but it is believed there is scope to develop a consumer/visitor-friendly website dedicated to promoting Ashby's attractions, businesses and opportunities.
- the provision of free wi-fi within the town centre, complemented by the development of an app-based heritage trail and town centre information which is compatible with mobile devices
- developing a platform, such as an electronic network which can be used to inform residents, businesses and key stakeholders of projects and plans in the town. This could be used as a key mechanism to coordinate community activity and keep the sense of community engagement and pride. Such a platform could also be used to bring together the various clubs and groups that are active locally which are regarded a real asset in the town.
- delivery of a promotional campaign utilising social media (to local people and potential visitors)

Quality Enhancement Projects

This would comprise:

- Improving the town's car parking facilities, creating an out-of-town location for coaches to park. At the weekends underutilised space, such as school playgrounds could be used for parking, and be an effective way to increase parking and relieve town centre congestion without detracting from the town centre public realm.
- Installing attractive signage, linking to traders and mews so that visitors are less likely to walk past the many shops which are hidden from view in the town's mews. Other ideas include making greater use of vacant shops as temporary pop up shops and increased use of local public space. Such areas could be used as an outdoor venue to hold an increased programme of events, summer activities and leisure opportunities.

Regeneration Projects

- Given the presently limited promotion of local opportunities to potential investors and new businesses, the development of a business marketing campaign and supporting investor prospectus may be worthwhile to establish a greater business culture and create diversity of local employment opportunities, beyond just tourism. Offering support to businesses already located in Ashby is as important as encouraging new ones and ought to be co-ordinated through the LLEP & North West Leicestershire District Council
- Develop a formal platform and acknowledged body through which businesses can be given a voice. It must have sufficient steer and sense of purpose such that it does not fail as has reportedly happened with previous similar initiatives. This could build upon the Ashby Town Trader's Forum.

Promotional Projects

- Promoting Ashby's success, its wealth of assets and attractiveness as a place to visit, live and work. This should have at least two strands, emphasising both the rich and diverse tourism offer but also the attractiveness of Ashby as a place to establish and grow a business. Schemes are already underway along these lines, including the distribution of Ashby Life, (a monthly glossy magazine promoting local businesses as well as events/things to do in town – commercially produced and funded by advertising revenue) to local residents informing them about forthcoming events and the use of social media, although at present this mainly serves the Town Council as oppose to the town itself. A communication campaign could be far more wide-reaching and serve to develop an Ashby identity for tourists and businesses, as well as improving local communication. Crucially, this should be a multi-medium approach to communication and capitalise on social media for more than just the distribution of Town Council updates.
- Promoting Ashby de la Zouch even more enthusiastically as the town at the heart of the National Forest could serve as an attractive branding image for the town and its tourism offer and one that would capitalise on its central and strategic location in the Forest served by a good road network. Establishing Ashby as a base for overnight, not just day visitors would bring a welcome boost to the local economy and this would require jointly the development of Ashby's accommodation offer and promotional material. Crucially, linking the National Forest Trail with a town centre trail which links the town's green spaces, heritage assets and centre would not only encourage footfall and visitor spend, but also further encourage overnight stays.

4. BLABY

Overview

4.1 Blaby Town Centre is the only “town centre” in the District ’ located within the parish of Blaby. It is approximately five miles away from the City of Leicester and sits a short distance from junction 21 of M1 and M69. It is also in proximity to Fosse Park. The town centre is considered compact, and currently comprises two supermarkets, approximately 50 independent retailers as well as estate agents and other service providers. The core shopping area is based around the Waitrose store, with architecture dating back to the 1970s.

4.2 The large number of local independent businesses is believed by study consultees to increase the town’s attractiveness and distinctive branding offer. However, there was some concern amongst consultees as to whether the town centre is truly meeting its potential.

Town Centre Population

4.3 Of the 449 residents of Blaby town centre, 73.9% are economically active, much higher than the LEP average. The percentage of self-employed people is also higher than the LEP average and the third highest of the market towns in this study. Town centre unemployment is higher than both the LEP and GB averages, although the actual number of people is small. Although the percentage of retirees is below the LEP and GB averages, Blaby town centre has the highest percentage of retired people out of all the market towns in this study.

Table 4.1: Blaby Town Centre – Population

	Town Centre		LEP	GB
	No.	%	%	%
All usual residents 16-64	449	100.0%	100.0	100.0
Economically active	332	73.9%	63.1%	63.3%
Employed	251	55.9%	48.0%	47.4%
Self employed	54	12.0%	7.8%	8.9%
Unemployed	16	3.6%	2.7%	2.4%
Full Time Student	11	2.4%	4.6%	4.7%
Economically Inactive	117	26.1%	36.9%	36.7%
Retired	78	17.4%	20.5%	21.4%
Student	20	4.5%	7.2%	5.3%
Looking after home / family	6	1.3%	3.9%	3.9%
LT Sick / Disabled	12	2.7%	3.3%	3.9%
Other	1	0.2%	2.1%	2.2%
Source: Census, 2011				

Indices of Multiple Deprivation

4.4 Many of the domains are in the seventh decile suggesting the area is not deprived. There are a couple of exceptions to this trend, with both Crime and Living Environment deprivation rating relatively high.

Table 4.2: Blaby Indices of Deprivation		
Deprivation Domain	National Decile (1 most deprived)	Leicestershire Rank (1 most deprived)
Overall	7	140
Income	7	159
Employment	6	142
Education, Skills and Training	7	248
Health and Disability	7	143
Crime	3	35
Barriers to Housing and Services	10	389
Living Environment	4	60
Source: English Indices of Multiple Deprivation (2015)		

Work Day Population

4.5 Table 4.3 illustrates the occupations of the workday population in Blaby. The occupations that stand out as most represented in Blaby are the 'Lower managerial, administrative and professional' occupations (23.2%) which is similar to England and Wales average but considerably higher than the LLEP average. The second and third most represented occupations are 'intermediate' occupations (16.3%) and 'semi-routine' occupations (16.8%) which are both higher than the LLEP and England and Wales averages.

Table 4.3: Town Centre Work Day Population			
Occupation	Blaby	LLEP	England and Wales
Higher managerial, administrative and professional occupations	6.8%	10.2%	11.3%
Lower managerial, administrative and professional occupations	25.3%	20.6%	22.9%
Intermediate occupations	17.8%	14.0%	14.0%
Small employers and own account workers	12.2%	9.6%	10.4%
Lower supervisory and technical occupations	6.8%	10.9%	7.6%
Semi-routine occupations	18.4%	22.9%	15.5%
Routine occupations	11.0%	16.2%	12.2%
Never worked and long-term unemployed	1.7%	3.1%	6.2%
Total Number	719	724,309	41.0m
Source: Annual Population Survey (2015)			

Town Centre Economic Value

4.6 Blaby's town centre has a GVA of £32.6m, which amounts to 3.1% of the total for all of the market towns included in this study. There are more than 700 people employed in the town centre. Average GVA per worker is £45,198 which is around 7% above the County-wide average.

Table 4.4: Value of Town Centre Economic Activity in Blaby			
	Workers	GVA £m	Proportion
Blaby	721	32.6	3.1%
Total	**25,197**	**1,061**	**100.0%**
Source: ONS figures and ERS analysis			

Strategic Context

4.7 In 2014, Blaby District Council published **'Opportunity Blaby' Economic Development Strategy 2014-2017** which identified four key themes in order to foster a prosperous economy. This included attracting inward investment; supporting local business; improving skills and training opportunities and improving infrastructure. The overall vision set by the Council is:

> *"Blaby District will be an attractive place to live, work and do business with an enterprising local economy offering opportunity for business growth, sustainable employment and enhancement of work skills, supported by thriving rural and town centres"*

4.8 The **Blaby District Local Plan Core Strategy (2013**) sets out the long term spatial plan for the District up to 2029.

4.9 The Core Strategy presented a number of economic objectives, one of which is to maintain and improve the position of retail centres, and to enable existing centres such as Blaby Town Centre opportunity for growth. It suggested that Blaby Town Centre *"will be a more attractive, diverse and viable town centre which will be complemented by a network of other retail centres providing a wide retail offer*".

4.10 The **Blaby Neighbourhood Plan (2014)** builds upon the key principles set out in the Core Strategy and further demonstrated the need for sustainable development. The overall vision for the parish is:

> *"Blaby will be a vibrant, well balanced community that continues to be a great place to live, to be educated, to work and to visit whilst maintaining its historic character as large village with an attractive conversation area and variety of open spaces".*

4.11 The Plan considered a number of important issues and challenges faced locally which included: the lack of external and internal investment to protect valuable green areas; lack of sustainable jobs and businesses; housing provision that meets local needs and infrastructure enhancement. From this, key priorities were identified, comprising:

- Maintaining and enhancing existing areas of green space
- Protecting and enhancing the town centre
- Determine the most appropriate location for any future development if necessary
- Protection of Blaby heritage
- Designation of an area of Local Green Space

4.12 The **Blaby Town Centre: Masterplan Implementation Plan – Final Report (2008)** is the guide for transformational change in the town centre over a fifteen year period. The masterplan utilised an evidence baseline and consultation findings with business and communities to develop an overall vision for the centre. This is:

"Blaby Town Centre will be an individual shopping and visitor experience with a distinctive and sustainable range of independent and specialist shops operating alongside major national retailers. It will have an attractive, green, village character that will distinguish it from larger centres and out-of town retail parks. Blaby Town Centre will also be a place to enjoy outdoor leisure and heritage facilities. It will be a place for the local community and for visitors. It will be a place where pedestrians come first but also where cars and buses are accommodated in a safe and convenient manner".

4.13 Furthermore, the masterplan identified that the town centre was underperforming and at risk of losing its place within the retail hierarchy. This meant that if further investment had not been secured, it could have been detrimentally affected in terms of its future vitality and viability. In order to realise the vision, nine principles were developed and designed to provide both practical and deliverable goals for transformation change, which included:

1. To create an attractive Town Centre environment
2. To achieve greater pedestrian priority whilst also meeting the needs of motorists and enhancing public transport provision
3. To strengthen access to the town centre from surrounding residential areas, especially for pedestrians
4. To improve car parking within the Town Centre
5. To retain and attract a sustainable range of shops and service
6. To capitalise on local heritage features to enhance the visitor experience
7. To improve existing open spaces, particularly Bouskell Park, and improve integration of these facilities with the Town Centre
8. To develop a higher quality leisure offer and enhance the evening economy
9. To develop a distinctive and marketable image and identity for the Town Centre

4.14 Alongside the principles, a set of projects were considered, developed and tested to deliver the vision for Blaby Town Centre. Projects included site intervention options, environmental improvements, accessibility projects and non-physical interventions including Farmers Market. Four of the projects were identified as being Transformation Projects i.e. generating the most impact, which included:

- **British Legion Site** – redevelopment on car park, relocation of British Legion, new street/courtyard with A3/retail and office above, basement parking
- **John's Court** – development of new shops, library and community centre. Re-siting and extending Waitrose, extending and enhancing public square, upper level parking
- **Bouskell Park Entrance –** New park entrance and signage, sculpture trail in park, restoration of ice house, open space enhancements, new visitor centre with exhibition space and cafe
- **Town Centre Core: Environmental Enhancement** – new street furniture, lighting, paving etc. Raised table, 1-way on Cross Street, remove some parking bays, new town square

4.15 In order to implement the Masterplan proposals, recommendations included: the formation of a Town Centre Partnership (membership open to public sector, key landowners and stakeholders); development of a clear strategy and programme to coordinate delivery; and an effective marketing and communication strategy.

4.16 In response to this, the **Blaby Town Centre: Action Plan for the Development of a Town Centre Partnership (2010**) reviewed the state of the town centre, consulted with local stakeholders and recommended an Action Plan for the establishment of a Blaby Town Centre Partnership. Priorities identified included improving the appearance and aesthetics of the centre alongside developing a town identity through promotional activity around its history. Although the retail offer/improvements to the retail mix was mentioned, this was not seen as a high priority. Core areas of future focus were recommended including developing a partnership of relevant stakeholders with a strong management structure and develop business and action plans both yearly and five yearly to achieve objectives.

4.17 Node compiled a **Neighbourhood Plan Blaby: Design Principles (2015)** report that identified a number of current issues within the town centre. This includes:

- Poor quality of hard landscape through mix of materials, many repairs on roads leading to a patchwork effect, no coherent palette of street furniture;
- Central area is dominated by the cross road, traffic controls and road markings made a cluttered public realm;
- Few soft landscape elements i.e. street trees, within the urban environment; and
- John's Court area at entrance to Waitrose is under-used and outdated in appearance.

4.18 In order to combat these, a series of general design principles were recommended which included: introducing tree planning, and other soft landscape elements; reduce visual clutter; create cohesive feel to public realm and make specific improvements to the main cross road and John's Court area.

Progress towards strategic objectives

4.19 Whilst some of the short term early win projects have progressed, including environmental improvements, developing the other longer term transformational projects was reported to have been challenging due to multiple site ownership and limited levels of resources. Consultees gave credit to the improved townscape environment with limited reference to the other key site projects. Blaby Town Centre Partnership was set up in 2008 and although still operating in principle, business engagement has lapsed. Blaby District Council funded a dedicated Town Centre Manager who worked with the Town Centre Partnership and organised events etc., but funding for this post was withdrawn.

Retail Offer

4.20 The town core is focused around John's Court and Lutterworth/Leicester Road. There has been little change in terms of shop frontage and planning use within the centre, between 2008 and 2015, with the majority of units being shops and retail outlets i.e. hairdressers, funeral directors, etc.. However, other units have a high representation across the centre, especially surrounding Lutterworth Road, including professional services and food & drink establishments.

4.21 Blaby hosts a monthly farmers market, and since 2011 it witnessed a slight increase in the average number of attendees per month. However recently the number of stalls and visitors has declined and consultees feel that changes may be required.

4.22 A **Healthcheck Appraisal** was completed on Blaby Town Centre as part of the Leicester City Council and Blaby District Council town centre retail study (September 2015). This looked into the retail offer, accessibility, and the environment amongst other factors. The findings of the healthcheck indicated that the centre was considered to be a main food shopping destination, with two national food operators Aldi and Waitrose located within the centre. Furthermore, there was a particularly strong convenience, leisure, retail and financial and business service offer. However, in terms of comparison goods, this is restricted to meeting day-to-day needs.

4.23 Overall, the healthcheck identified that the town centre functions well, with good car parking arrangements at affordable rates and accessibility by a range of transport options (including by foot, on bike or public transport) was satisfactory. With regard to the environment, the high street consists of low quality 1960s style retail units however the high quality street furniture and outdoor seating provided by local cafes offset this issue. Other suggested improvements relate to addressing the visual appearance of the rear of the buildings facing Johns Court, lower pedestrian flows on Lutterworth Road and dated frontages of retail units to enhance visual appearance.

Retail Composition

4.24 Drawing on the Leicester City Council and Blaby District Town Centre and Retail Study (2015), the town centre comprises approximately 96 retail units. Retail uses in the centre are largely concentrated along Lutterworth Road which runs on a north/south axis, and around the junction between Enderby Road and Cross Street.

4.25 The centre has a strong convenience goods offer comprising a total of 11 units which is above average. This includes representation from two multiple operators (Waitrose and Aldi) alongside two bakeries, a butcher, a greengrocer and three smaller general convenience stores.

Table 4.5: Blaby Town Centre Retail Composition

Retail Category	No. Units	% of Total	UK Average (%)	Variance
Convenience	11	11.5%	9.2%	+2.3%
Comparison	23	24%	39.8%	-15.8%
Service	56	58.3%	37.4%	+20.9%
Vacant	2	2.1%	12.4%	-10.3%
Miscellaneous	4	4.2%	1.2%	+3.0%
TOTAL	**96**	**100%**	**100%**	**-**

Source: Leicester City Council & Blaby District Council Town Centre and Retail Study (2015) / 2015 UK Average (Experian Goad)

4.26 In contrast, the centre's comparison retail offer is substantially below average (-16%). However, this is not surprising given the proximity of the centre to Fosse Park and Leicester, both of which exert significant influence over the area. Reflecting this, the town centre's comparison retail offer is generally focused around meeting day-to-day retail needs of its local catchment.

4.27 The centre's service offer is significantly above average (+21%), although this is largely attributed to retail services such as health and beauty salons. By contrast, the centre's leisure offering is more limited.

4.28 The centre has a very low vacancy rate with just 2 vacant units equating to 2.1% of all units. This compares very well against the national average of 12.4%.

4.29 Overall, Blaby town centre offers a reasonable mix and choice of retail uses aimed at serving the everyday needs of its local catchment. The centre has a particularly strong convenience (including Waitrose and Aldi) and service offer which reinforce its role in the local retail hierarchy as meeting day-to-day needs. The centre's comparison retail offer more limited reflecting the proximity of major higher order shopping destinations including Fosse Park and Leicester.

4.30 The 2015 Retail Study identifies areas for potential improvement including aesthetic enhancements to some of the shop frontages; and scope to increase pedestrian footfall towards the north of the crossroads on Lutterworth Road.

Available Retail Expenditure

4.31 Having regard to the results of the household survey of shopping patterns underpinning the Leicester and Blaby Town Centre Retail Study (November 2015), we have defined the primary catchment area (PCA) for Blaby as comprising Zone 4[13] of the defined Study Area.

4.32 Population estimates and forecasts for the PCA have been drawn from the Pitney Bowes GeoInsight database. This provides estimates of population based on projections and the 2011 census for small, localised areas. Overall the population within the PCA is currently 37,681. This is forecast to grow to 38,791 by 2021 and to 33,963 by 2026. This equates to an overall projected growth of 6.1% over the next 10 years.

4.33 Total available expenditure in the survey area in forecast years is a product of both population change and spending growth applying these trend-based projections. The outputs of this analysis in terms of available 'retail' expenditure, is set out within Table 4.6 below.

Table 4.6: Forecast Available Retail Expenditure within Blaby PCA

Year	Convenience Goods	Comparison Goods	Total Available Retail Expenditure
2016	£83.2m	£134.32m	£217.5m
2021	£87.8m	£177.3m	£265.2m
2026	£92.8m	£234.3m	£327.0m
% Growth '16-'26	11.5%	74.4%	50.3%

Source: Turley (2015)

Current Shopping Patterns

4.34 Not all available expenditure generated within the PCA will be spent within Blaby town centre. The results of the household survey undertaken in November 2014, indicate that the town centre retains approximately 25% of convenience goods expenditure generated within the PCA. This is a relatively low level of retention compared to national averages but is also reflective of the range of alternative stores available within the PCA including Asda, Narborough Road and Tesco, South Wigston.

4.35 For comparison goods, the centre only achieves a market share of 3% (£2.7m) within the PCA. Again this is reflective of the nature of localised comparison retail provision on offer in the centre and the proximity of higher order centres and retail shopping destinations, including Leicester and Fosse Park which have a strong influence over the PCA and collectively attract c.£80.2m (60%) of locally generated comparison goods expenditure from with the PCA.

[13] Comprising the following postal sectors: LE8 4, LE8 5, LE8 6, LE8 8 and LE18 3.

Summary

4.36 Overall, Blaby has a reasonable range of goods on offer to serve everyday shopping needs. The centre has a strong convenience shopping role and draws the majority of retail expenditure from within the local area. This is supplemented by a strong service offer although there is scope to enhance the range of leisure facilities. By contrast, the centre's comparison retail role is more limited and localised in nature. This reflects the proximity of higher order centres and retail shopping destinations, including Leicester and Fosse Park. Furthermore, the imminent expansion of Fosse Park is expected to impact even more significantly on Blaby's town centre. The centre will never compete on the same basis as these destinations, but should strive to make improvements where possible to ensure it continues to maintain its attractiveness and appeal.

4.37 Blaby is currently seen to be functioning well but could be threatened by a number of factors. One significant perceived threat facing Blaby is the number of closures in the pipeline for high street units, including banks. The concern amongst consultees is that vacancies may lead to a spiral of decline which could impact on other local businesses.

4.38 Despite a successful start, the number of stallholders, variety of stalls and local support for the Farmer's Market has dwindled over the last few years. There are now concerns over the viability of the Farmer's Market but there is strong support for the Market, including from the District Council and it is exploring possible improvements . There may be an opportunity to re-assess the market, widen the offer and consider the best way to run the market.

4.39 Internet shopping is considered an ongoing threat to the town centre shops however Click and Collect may be beneficial and gives people a reason to visit.

4.40 The loss of any banks would be a concern for the town centre. Furthermore, the loss of any local services would likely impact upon traders because one of the draws of Blaby town centre currently is the services such as library, banks, post office etc.

4.41 There is a good relationship between the District and Parish Council and this is perceived to be a key factor in the effective delivery of projects in Blaby. Business engagement in Blaby has room for improvement. Any future projects are likely to require the 'buy-in' of local businesses and as such there may be room to further develop the business community to support such initiatives.

4.42 There are opportunities to improve the public realm within the town centre. The Node (July 2015) report has analysed the urban design in detail and this gives Blaby the evidence needed to make positive changes. There is scope for creating gateways to mark entry into the town centre and for much better signage within it.

4.43 Although it may be argued that the high number of independent businesses is a benefit, Blaby may be becoming increasingly uncompetitive due to the lack of quality shopping and retail offer. This is something that needs to be monitored closely by the District Council

4.44 Promotion of Blaby as a place to visit and to locate a business is currently limited and there are opportunities to raise awareness of what is on offer as a town centre and to support individual businesses to do the same.

4.45 Blaby is functioning, but needs to consider future threats carefully and design projects which seek to build resilience to increases in online shopping, the expansion of Fosse Park and potential closures/vacancies. Emphasis should be placed upon identifying the unique selling point and future role of Blaby in the context of these threats. Small scale interventions on behalf of the District and Parish Council have resulted in some good results and the continuation and development of these should be the first priority. Blaby could benefit from additional investment and improvement, particularly the public realm and ensuring that there is still reason for people to visit e.g. events. These are identified in the SWOT analysis below and in the following section which outlines potential projects.

SWOT Analysis

Strengths	Weaknesses
• Diverse range of national and independent retail stores inc. presence of Aldi and Waitrose • Events well attended e.g. Blaby Festival • Very healthy occupancy rate • Bouskell Park • Inclusive play area nearby • Proximity to Leicester • Compactness • Sufficient car parking which is well used	• 'Dated' architecture/ public realm • Forge Corner – traffic, urban design and pedestrian access to Cross Street • Few national chains • Lack of night time economy • Fewer high grade job positions in the centre • Perceived cost of car parking
Opportunities	**Threats**
• Development of Blaby Hall • Making the most of Bouskell Park greenspace • Improving links between Blaby Hall, Bouskell Park and the town centre • Development of Masterplan projects • Building on existing events • Improvements to the public realm • Better engagement with business community • Reinvigorating the Farmer's Market. • Niche offers • Click and Collect	• Fosse Park expansion • Internet shopping • Becoming increasingly uncompetitive due to the lack of quality shopping and retail offer • Proximity to Leicester • Potential vacancies and associated impacts • Loss of services, such as banks • Loss of diversity of independent shops/retail offer

Potential Projects

4.46 Each of the below are regarded as potentially viable projects, albeit it has not been possible to determine potential costs or the likelihood of securing funding. These projects are aimed at recapturing some existing resident spending, capturing a good proportion of the spending of those who will move into new homes being built in the area and generating higher levels of visitor spending.

4.47 Whilst it is impossible to predict the impact any of these projects might have, a measure of the potential return on investment is that if by 2021 the percentage of retail expenditure currently drawn to other centres/retail destinations could be reduced by one tenth (from 66.0% to 59.4%), this would generate an additional £17.5 million of retail expenditure each year.

Digital Projects

- the development of a town centre website, linked to websites for other Leicestershire market towns and linked to existing sites such as Blaby Parish Council
- the provision of free wi-fi within the town centre.
- delivery of a promotional campaign utilising social media (to local people as well as potential visitors) driven by a partnership group, including local authorities and business group.

Quality Enhancement Projects

- Prioritising pedestrians and simplification of the public realm – improving opportunities to cross the Lutterworth Road and shops located on Cross Street. Signage, walking routes and improving links between, Bouskell Park and the town centre could also be considered as part of public realm enhancement projects. The installation of gateways or public art would also benefit Blaby.
- Shop front improvements
- Bouskell Park is seen to be a key asset and potential development projects involving the use of Blaby Hall could have a big impact on the town centre.

Regeneration Projects

- Renovation of Blaby Hall - Blaby Hall is currently vacant and owned by Everards the brewery. Significant opportunities were suggested by consultees including renovation to business units, a cultural centre, gallery and café/restaurant. It is unclear if Everards would be willing to sell the property at present and this idea would need further exploration (e.g. feasibility study) supported by appropriate funding mechanisms.
- Re-visiting the previously cited British Legion Site, John’s Court and Bouskell Park projects

Promotional Projects

- Continuation and development of the current events programme, including entertainment for families to increase footfall in the town centre.
- Promotion of Blaby as a place to visit and to locate a business is currently limited and there are opportunities to raise awareness of what is on offer as a town centre and to support individual businesses to do the same. Projects focused on a social media campaign and training for individual businesses on use of social media were suggested by consultees.
- The Farmer's Market requires some careful consideration and attention to ensure that it remains to be successful and beneficial. This might involve attracting and incentivising new stallholders and promotion or events to coincide with the market.

5. COALVILLE

Overview

5.1 Coalville is considered the principal town in North West Leicestershire and above Ashby de la Zouch in terms of the District's settlement hierarchy. As such, it is anticipated to be a strong centre serving the local community and more outlying settlements. The town resides within the National Forest and is in close proximity to East Midlands Airport. Coalville has good access onto the M1 and A42 and thereby to Derby, Nottingham and Leicester.

5.2 Coalville developed in the early 19th Century to serve the growing mining population. The town has never fully recovered from the industrial decline in the 1980s and today the economic outlook is one of underperformance, reflected in its town centre. The last major investment project in the town centre was in the 1960s/70s (the Belvoir Shopping Centre). More recently Snibston Discovery Museum (which celebrated science, discovery and local mining heritage) closed. However, there is a great sense of community spirit in the town, albeit mixed with frustration that more has not been achieved towards realising the town's potential.

Town Centre Population

5.3 The table below presents population data for Coalville town centre. At 75.5%, the economic activity rate is higher than that for both LLEP (63.1%) and GB (63.3%), albeit this does not reflect the town as a whole, as the areas of deprivation are outside the town centre. Noteworthy is the low proportion of retired people in the town centre (6.7%) relative to the LLEP area (20.5%) and GB (21.4%) reflecting the fact that Coalville has little to attract somebody to retire there.

Table 5.1: Coalville Town Centre – Population

	Town Centre		LEP	GB
	No.	%	%	%
All usual residents 16-64	208	100.0%	100.0%	100.0%
Economically active	157	75.5%	63.1%	63.3%
Employed	123	59.1%	48.0%	47.4%
Self employed	16	7.7%	7.8%	8.9%
Unemployed	17	8.2%	2.7%	2.4%
Full Time Student	1	0.5%	4.6%	4.7%
Economically Inactive	51	24.5%	36.9%	36.7%
Retired	14	6.7%	20.5%	21.4%
Student	4	1.9%	7.2%	5.3%
Looking after home / family	6	2.9%	3.9%	3.9%
LT Sick / Disabled	21	10.1%	3.3%	3.9%
Other	6	2.9%	2.1%	2.2%

Source: Census Data, 2011

Indices of Deprivation

5.4 In Coalville, scores in many of the domains are in and around the fourth decile suggesting the area has slight deprivation issues. It is notable that Education, Skills and Training seems to be an area of particular deprivation, whilst 'Barriers to Housing and Services' displays the lowest deprivation.

Table 5.2: Coalville Indices of Deprivation		
Deprivation Domain	National Decile (1 most deprived)	Leicestershire Rank (1 most deprived)
Overall	4	40
Income	4	46
Employment	3	30
Education, Skills and Training	2	29
Health and Disability	5	49
Crime	4	86
Barriers to Housing and Services	10	327
Living Environment	3	21
Source: English Indices of Deprivation (2015)		

Work Day Population

5.5 Table 5.3 illustrates the occupations of the workday population of Coalville. The Lower Managerial workday population (20.2%) is significantly higher than that of the LLEP, but comparable to that of England and Wales. Furthermore, Coalville has a far higher proportion of individuals employed in semi-routine occupations than both the LLEP and England and Wales comparators. Particularly noteworthy is the almost negligible number of people who have never worked or are long-term unemployed with most of the deprivation in Coalville being in Agar Nook and Greenhill, which are on the outskirts of the town centre.

Table 5.3: Town Centre Work Day Population in Coalville			
Occupation	Coalville	LLEP	England and Wales
Higher managerial, administrative and professional occupations	7.2%	9.0%	10.2%
Lower managerial, administrative and professional occupations	20.2%	11.2%	20.8%
Intermediate occupations	13.3%	12.4%	12,8%
Small employers and own account workers	4.7%	8.5%	9.4%
Lower supervisory and technical occupations	11.9%	7.1%	6.9%
Semi-routine occupations	23.1%	14.2%	14.1%
Routine occupations	14.7%	13.6%	11.1%
Never worked and long-term unemployed	0.6%	5.5%	5.6%
Total Number	3,533	724,309	41.0m
Source: Annual Population Survey (2015)			

Town Centre Economic Value

5.6 Coalville's town centre has a GVA of £135.6m, which amounts to 12.8% of the total for all of the market towns included in this study. There are more than 3,000 people employed in the town centre. Average GVA per worker is £44,285 which is around 5% above the County-wide average

Table 5.4: Value of Town Centre Economic Activity in Coalville			
	Workers	GVA £m	Proportion
Coalville	3,063	135.6	12.8%
Total	**25,197**	**1,061**	**100.0%**
Source: ONS figures and ERS analysis			

Strategic Context

5.7 The regeneration of Coalville is a current and top priority of NWLDC. The Council has been working with partners to deliver a range of projects aimed a regenerating the town centre, which will run over the next four years. Collectively known as the Coalville Project (2016), the following projects are already underway as part of this scheme in order to build confidence in Coalville:

Coalville Conservation Area

Parts of the town centre have been designated as a conservation area. Protecting the town's buildings and industrial heritage is considered an important way to regenerate and revitalise the town.

Coalville Market

Improvements are currently taking place to regenerate the indoor Market Hall, including lighting, interior design and signage; working with local traders to ensure the best improvement measures are made.

Ex-Pick and Shovel

After standing vacant for 10 years the Pick and Shovel pub has been demolished and a new affordable housing development of 14 dwellings has been completed. The £2.2 million development is set to be completed in April 2016 under the new name of 'Royal Oak Court'.

Shop Front Improvement Scheme

In Phase 1 of the scheme, NWLDC is offering grants to local shop owners on Hotel Street and High Street of up to 50% and 70% of the cost towards repairs and reinstatement works. These streets in particular have been identified for support in the design and upgrading of their fronts as they reside in the designated Coalville Conservation Area. A key emphasis is upon the use of traditional materials that will contribute to the character and identity of the area and its frontages.

Ford Motors Coalville

Planning permission has been granted to develop the site of the

former Ford garage and shops on Hotel Street for new retail units; with specific emphasis on ensuring the design is in-keeping with the town's aesthetics. The site had previously been earmarked for a Tesco food store, however the retailer withdrew their planning application.

5.8 In addition, there is a potential bid to Heritage Lottery Fund for the 'Our Heritage' project celebrating the District's heritage.

5.9 Informing the design and delivery of these projects and the **Coalville Project** more generally is the Four **Squares and Streets Investment Plan (2010).** The Four Squares proposal was put together in 2007 by the Prince's Foundation and looked at linking Stenson Square (where the Council Offices are) with Marlborough Square, Memorial Square, the Market Place and the Belvoir Shopping centre area via vibrant streets.

5.10 The plan seeks to address issues surrounding poor accessibility, congestion and the lack of connected streets and spaces. The focus of the Four Squares and Street Investment Plan is "on making streets and spaces for people and reversing the often dominant impact of vehicles within town centre". The main objectives of the plan are to:

- Identify a series of public and private sector led investment projects
- Propose a design process 'protocol' for their development
- Create a series of objectives and conceptual proposals for each of the projects
- Prepare a 'palette' detailing materials and items of furniture for the town centre
- Prioritising projects and identifying sources of funding

5.11 Eighteen projects were identified and prioritised[14] and it is clear that many of these sites are currently being developed as part of the **Coalville Project**.

5.12 The design and delivery of both the **Coalville Project** more recently and the **Four Squares and Streets Investment Plan (2010)** stemmed originally from recommendations made in the **Coalville Regeneration Strategy (2009)**. The main focus of the **Coalville Regeneration Strategy (2009)** was on creating more open spaces, improving traffic flows and increasing the retail offer and hence improving the future design and function of the town centre. The strategy sought to address concerns of a retail offer that is increasing around the periphery of the town, decreasing town centre footfall, increasing town centre congestion and a deterioration of the market square both in terms of appeal and use.

5.13 NWLDC is currently developing a **Local Plan** to cover the entire district and its anticipated adoption is **September 2017.** The plan presents how much housing and employment development is required in Coalville, Ashby and other centres in the district, up until 2031.

[14] which in order of strategic importance are: Marlborough Square, Market Place, Bridge Street, Broadway, Needhams Walk, Railway Crossing, Long Lane (extensive of Broadway) and Snibston Greenway, High Street, Hotel Street, Belvoir Road North, Belvoir Road South, Stenson Green, Jackson Street / Belvoir Road, Mantle Lane / Stephenson College Link, Whitwick Road (Stenson Square to Stephenson Way), Memorial Square and Ashby Road.

5.14 Coalville is to be the focus of significant regeneration efforts in the emerging Local Plan and this serves to confirm developments that are already underway. As part of this, Coalville has been identified as the preferred location for new retail and other town centre uses in the District, to ensure the town continues to function effectively in serving the needs of residents and the wider community. Furthermore, Coalville is to play a significant role in accommodating future housing opportunities in the district (10,700 dwellings will be required between 2011-2031 (or 535 a year).

5.15 A major development in contribution to this target is a series of sites collectively known as South-East Coalville. Construction of 3,500 buildings are proposed, of which so far planning permission has been granted for 800 dwellings on a site north of Grange Road, and there is a resolution to grant planning permission for 2,700 dwellings on a site North and South of Grange Road at Hugglescote. Several additional sites in Coalville have secured planning permission or are in the process of being granted planning permission in order to contribute towards the districts housing targets.

5.16 In addition, Leicestershire County Council owns the Springboard Centre (adjacent to Memorial Square), which houses a number of businesses, many of which are dependent on the town centre for footfall. The building is in serious need of repair in the short term.

Progress towards strategic objectives

5.17 NWLDC has made progress towards the Coalville Project. The opening of the former Pick and Shovel, now named Royal Oak Court is the first marker and the project's first visible achievement.

5.18 In addition, there are a number of actions in development under the Coalville Project banner:

- Our Heritage – a potential Heritage Lottery Fund application to celebrate district's heritage with emphasis on Coalville's 19th and 20th century heritage.
- Stenson Square – feasibility study into potential for better use of space.
- Discussions underway with the owner of the Emporium nightclub to potentially improve the façade (as well as similar conversations with other key town centre business owners).
- Women's network – establishing a 'women in business' network to support businesses and feed into the regeneration of Coalville.
- VCSE Steering group – NWLDC Officer appointed to help coordinate partnership working between voluntary and community sector groups and feed into the regeneration of Coalville.
- Communication campaign – regularly collecting and communicating positive messages and promoting what is happening in Coalville.

5.19 Consultation with residents in Coalville undertaken by NWLDC in September 2015 revealed that residents consider the heritage of Coalville, community spirit and close-knit nature of the community as well as the transport infrastructure (including cycle paths) to be particular strengths. Weaknesses included a lack of leisure facilities and vacant shops in the town centre.

Retail Offer

Retail Composition

5.20 Drawing on the most recent survey undertaken by Experian Goad (July 2015), the town centre comprises approximately 188 retail units. The retail offer in the centre is largely focused around the Belvoir Shopping Centre, a pedestrianised precinct situated between High Street and Belvoir Road.

5.21 The centre's convenience goods offer comprises a total of 16 units. This is broadly in line with the national average and represents 'no change' from that recorded by Experian Goad in July 2012. There is a reasonable range of convenience goods on offer, including representation from bakers, butchers, greengrocers and grocery stores and general convenience stores. The centre is served by two modestly sized supermarkets, Asda and Co-op although these are located on the periphery of the centre which affects the extent to which they can perform a key anchor role. There is also a large Morrison's on the edge of the town centre which offers substantial free car parking and a further range of retail units on Whitwick Retail Park, including B&M Bargains.

Table 5.5: Coalville Town Centre Retail Composition

Retail Category	No. Units	% of Total	UK Average (%)	Variance
Convenience	16	8.5%	9.2%	-0.7%
Comparison	72	38.3%	39.8%	-1.5%
Service	77	41.0%	37.4%	+3.8%
Vacant	20	10.6%	12.4%	-1.8%
Miscellaneous	3	1.6%	1.2%	+0.4%
TOTAL	**188**	**100%**	**100%**	**-**

Source: Experian Goad (July 2015)

5.22 The Centre's comparison retail offer is marginally below average. Comprising a total of 72 units, this equates to one additional comparison unit since July 2012. Closer analysis indicates a reasonable mix of comparison stores with representation across the majority of comparison goods sub-categories, the only exception being 'gifts, china, glass and leather goods'. The comparison offer is largely orientated towards the discount end of the retail spectrum, particularly in respect of the clothing and fashion goods sector. The main anchor stores to the Belvoir Centre include Wilkinson's ("Wilko") and Home Bargains, both of which are discount retailers.

5.23 The town centre has above average representation from retailers within the services category. Comprising a total of 77 units, this represents an increase of 5 units since July 2012. Closer analysis highlights a notable number of restaurants, cafes and fast food outlets (24) and hair and beauty salons (28). There is also above average provision of banks and financial services and estate agents.

5.24 There has been a marked reduction in the number of vacancies in the centre since 2012, when 31 vacancies were recorded compared to 20 vacancies recorded in 2015. This has brought the vacancy rate down to below average levels. This is largely attributable to the demolition of vacant units along Hotel Street in preparation for the redevelopment of the Motor's Ford site which has planning permission for six new retail units comprising a total of 5,949 sq. m. gross retail floorspace. Planning permission was granted in July 2015 (Ref: 14/00692/FULM).

5.25 In addition to the above, planning permission also exists for an extension to and the redevelopment of the Belvoir Shopping Centre. Planning permission was first granted for the scheme in April 2010 (Ref. 09/00359/FULM) and the District Council resolved to approve an application to extend the time period for the implementation of the scheme in August 2013 (Ref. 13/00330/EXTM). The scheme has yet to be implemented.

5.26 The retail composition of Coalville reflects an increasingly prominent role as a key service centre serving the Borough. The main convenience stores are located towards the centre's periphery and do not perform a key anchor role. The comparison offer includes a reasonable mix but this is largely orientated towards the budget/discount end of the retail spectrum and could be improved. There are development opportunities in the centre which, if delivered, could significantly improve the overall quality and range of retail uses on offer in the centre.

Current Shopping Patterns

5.27 Not all available expenditure generated within the PCA will be spent within Coalville town centre. Indeed, the results of the household survey (November 2012), which underpins the North West Leicestershire Retail Study (2015), demonstrates that the town centre retains approximately 15% of convenience goods expenditure (£15.6m) generated within the PCA and approximately 28% of comparison goods expenditure (£46.3m).

5.28 Adopting this as the baseline position, the level of retail expenditure attracted to the town centre is in the order of £62.0m at 2016, equating to a market share within the PCA of 22%. This is equivalent to the combined market share of out-of-centre retail provision located around the town centre which £60m (22%) from within the PCA and indicates that the two offerings are reasonably well balanced.

5.29 However, closer analysis reveals that the town centre performs less well in terms of convenience goods, whereas the out-of-centre Morrisons (and to a lesser extent Aldi and Lidl) dominate the PCA with 51% market share. By contrast, out-of-centre comparison retail is less influential with a market share of just 3% compared to the town centre's 28%. Further improvements to the town centre's convenience and comparison offer, whilst maintaining the current level of out of centre provision would help to reinforce Coalville's overall market share within the PCA.

5.30 Overall, the analysis indicates that 56% of retail expenditure is currently drawn to other centres/retail destinations beyond Coalville and its immediate surroundings. This 'leakage' is largely attributed to comparison goods which is not unusual given the proximity of higher order centres such as Leicester and to a lesser extent Nottingham. The results of the household survey also indicate reasonable levels of leakage to Loughborough from within Coalville's PCA.

Available Retail Expenditure

5.31 Having regard to the results of the household survey of shopping patterns underpinning the North West Leicestershire Retail Study (2015), we have defined the primary catchment area (PCA) for Coalville as comprising Zones 2, 5, 6 and 7[15] of the defined Study Area.

5.32 Population estimates and forecasts for the PCA have been drawn from the Pitney Bowes GeoInsight database. This provides estimates of population based on projections and the 2011 census for small, localised areas. Overall the population within the PCA is currently 51,100. This is forecast to grow to 55,901 by 2021 and to 56,667 by 2026. This equates to an overall projected growth of 2.8% over the next 10 years.

5.33 In calculating future retail expenditure within the survey area, we have applied the latest, ultra long-term growth rates identified by Pitney Bowes (Retail Expenditure Guide, August 2015): +0.5% per annum for convenience goods, and +5.1% per annum for comparison goods. We have also made deductions for special forms of trading (SFT) which represents expenditure not available to spend in shops (i.e. internet shopping) based on the most up to date estimates published by Pitney Bowes (Retail Expenditure Guide, August 2015).

5.34 Total available expenditure in the survey area in forecast years is a product of both population change and spending growth applying these trend-based projections. The outputs of this analysis in terms of available 'retail' expenditure, is set out within Table 5.6 below.

Table 5.6: Forecast Available Retail Expenditure within Coalville PCA

Year	Convenience Goods	Comparison Goods	Total Available Retail Expenditure
2016	£108.6m	£168.9m	£277.4m
2021	£112.9m	£219.7m	£332.6m
2026	£117.3m	£285.7m	£403.0m
% Growth 16'-26'	8.1%	69.1%	45.3%

Source: Turley (2015)

[15] Equivalent to the following wards: Valley, Breedon and Thringstone; Ravenstone and Packington, Ibstock and Heather; Coalville, Snibston, Hugglescote and Bardon; and Whitwick and Greenhill.

Local Perceptions of retail on potential for improvement

5.35 Attitudinal questions were asked as part of the North West Leicestershire Household Survey, which explored the extent of potential areas for improvement within the town centre (Table 5.7).

Table 5.7: Suggested Improvements	
Improvement	Proportion of Respondents
More choice of shops (general)	36%
More clothes / fashion shops	16%
Nicer shopping environment	14%
Nothing – no improvements needed	12%
Fewer empty shops / vacancies	11%
Free parking	8%
More department stores / larger stores	7%
More quality / designer shops	5%
More / improved supermarkets / food shops	5%
Source: North West Leicestershire Household Survey (November 2012)	

5.36 This indicates a general demand for improvements to the town centre's retail offer, particularly in terms of the quality and choice of retail outlets. There are development opportunities in the town centre which offer potential to deliver modern retail accommodation that would help to attract new retailers to the town centre. However, in the context of on-going structural changes in the retail market and continuing polarisation towards higher order centres (particularly for comparison goods), it could be challenging for the centre to attract certain multiple operators and this may affect the viability or composition of new development without intervention of a public/private partnership such as the TCIM model trialled in Melton Mowbray

Summary

5.37 Overall, Coalville has a reasonable range of goods on offer to serve the everyday needs of its immediate catchment. The results of the household survey indicate a reasonable balance between the town centre and out-of-centre retail provision in the area in terms of overall market share and by carefully managing any further out-of-centre development, the interests of Coalville will be protected. Indeed, there are opportunities to bring forward new development in the town centre to improve its retail offer and these should be supported alongside more general improvements to the shopping environment. It will be necessary to carry out these improvements in order to attract the large amounts of housing growth proposed on the outskirts of Coalville.

5.38 Although Coalville is not considered a strong and vibrant town, there is a will and the mechanisms in place to invest and improve the town. Crucially, the prioritisation of Coalville's regeneration within NWLDC puts it in a good position to make the most of opportunities and deliver successful projects.

5.39 Consultees felt that visible change needed to be seen within the next 6 months after Royal Oak Court is completed to inspire local confidence in the Coalville Project. Addressing dereliction and vacant sites was considered a key priority. A steady stream of improvements demonstrating a vote of confidence in the town would go some way to reversing the decline and vacancy experienced over the last few years.

5.40 Putting together a plan for Coalville is complicated by the history of overly-ambitious, unrealistic and undelivered regeneration schemes in the town. Whatever projects are proposed, there is bound to be a degree of cynicism amongst local people. It is therefore very important that projects are credible and include some quick wins in order to demonstrate the seriousness of commitment to improving Coalville and generate momentum.

5.41 There are important opportunities that Coalville could exploit. In particular, 3,500 new homes are to be built at Bardon Grange in South East Coalville (South West of the town centre) and Stephenson College is set to take on around 100-150 additional apprentices. In addition, it is anticipated that around 500 jobs will be created locally by Amazon (http://www.leicestermercury.co.uk/Amazon-open-new-site-Leicestershire-creating-500/story-28761369-detail/story.html). This is significantly higher than the number of people unemployed across the District. All of this indicates rising levels of demand for retail and other services. The key question is how Coalville town centre can respond or, more particularly, anticipate this rising demand and ensure that it benefits the town centre.

5.42 Coalville should consider the incoming residents and opportunities to entice existing residents into the town centre and avoid segregation of the town centre from its peripheral housing areas. There is a distinct feeling that although residents may visit the town centre for practical purposes, there is little in the way of entertainment or leisure activities, especially for families and young people to keep them there for lunch, coffee and into the evening.

5.43 That future ought to consider its young people, young families and new residents, making a virtue of the town's relative affordability yet convenient location. Coalville has an opportunity to be seen as 'cool' rather than failing. If unable to attract a multiplex, it could accommodate small scale, pop-up and specialist cultural activities, such as festivals of music, comedy, street performance etc.. More generally, there is potential to develop its evening economy.

5.44 Consultees offered a range of suggestions for improvements, such as increasing outdoor seating for cafes, restaurants and bars to improve the vibrancy and leisure offer in Coalville, particularly within the 'Four Squares' areas. There is currently a perceived lack of offer in terms of coffee shops and restaurants. The Costa Coffee located in the Belvoir Centre is considered to be a success and the business group suggested that there was room for more cafes and restaurants.

5.45 Engagement with owners of the Belvoir Shopping Centre and other key sites is crucial Attempts have been made to enter into dialogue with the pension fund that owns the Centre and that this has previously proven difficult and although NWLDC is in contact with the Centre it is currently prioritising the areas over which it has direct control.

5.46 It is important that Coalville takes a holistic approach to regeneration and looks to the people, organisations and businesses as much as improvements to the physical fabric of the town. This is something that the Coalville Project acknowledges and the strong emphasis on consultation and people should be maintained.

5.47 Support for SMEs is seen as particularly important in Coalville, as is good relationships with the major employers in the area. Some of the business consultees noted that it can be difficult to attract employees due to the limited offer that Coalville has for lunch/evening/weekend activities. The Council is considering case studies of successful businesses located in Coalville to promote the benefits the town has to offer.

5.48 Coalville is at a critical point and although there are many challenges, which the SWOT analysis clearly shows there are also numerous opportunities. If Coalville fails to take advantage of these opportunities, it will become a classic dormitory town; one in which people rest their heads but go to work and spend their money elsewhere. Given its past, it is crucial to demonstrate investment and increased confidence in the town and to acknowledge its potential.

SWOT Analysis

Strengths

- Accessibility and proximity to major cities
- NWLDC prioritising regeneration of Coalville –a vision, strategic plan, structures and resources are in place to deliver projects benefitting the town centre.
- Community spirit and sense of pride.
- Coalville's heritage
- A network of cycle paths throughout the town including national cycle network Route 52.
- Availability of green space and location in the National Forest.
- An affordable place to live.
- High town centre economic activity rate
- Low barriers to housing and services

Weaknesses

- Accessibility and proximity to major cities – leakage of entertainment/shopping spend.
- Dereliction and high vacancy rates.
- Poor urban design.
- Limited retail offer
- Limited daytime hospitality and leisure offer.
- Lack of night time economy and limited food & drink offer.
- Little control over future of the Belvoir Centre.
- No railway station.
- Perception of lack of public transport, particularly in the evening.
- Poor performance in education, skills and training
- Public negativity

Opportunities

- Promoting Coalville's successes and raising awareness of the shopping, services, activities and transport offer.
- New housing development in Coalville offers opportunity to improve the town centre.
- Capitalising on Coalville's strengths, particularly its heritage and location.
- Improving and linking greenspace and heritage assets e.g. heritage trails.
- Pop-up arts and cultural exhibitions, performances, and regular events particularly within the 'Four Squares'.
- Develop projects in close dialogue with stakeholder groups.
- Encouraging the improvement of shop frontages.
- Public realm improvements, particularly within the 'Four Squares'.
- Relocation of the leisure centre to the centre of town.
- Further support for SMEs.
- Opportunity to increase worker spend
- Market Hall
- Belvoir Centre

Threats

- Local scepticism as a result of previously unsuccessful proposals.
- If there are not regular visible changes made to the town centre, it may be hard to win local support.
- Residents in new housing developments do not make use of the town centre.
- The closure of Snibston Discovery Museum may have implications e.g. fewer visitors, impact on the Century Theatre.
- Increased traffic through the centre will make it less welcoming for pedestrians.

Potential Projects

5.49 Each of the below are regarded as potentially viable projects, albeit it has not been possible to determine potential costs or the likelihood of securing funding. These projects are aimed at recapturing some existing resident spending, capturing a good proportion of the spending of those who will move into new homes being built in the area and generating higher levels of visitor spending.

5.50 Whilst it is impossible to predict the impact any of these projects might have, a measure of the potential return on investment is that if by 2021 the percentage of retail expenditure currently drawn to other centres/retail destinations could be reduced by one tenth (from 56.0% to 50.4%), this would generate an **additional £18.7 million** of retail expenditure each year.

Digital Projects

- the development of a town centre website, linked to websites for other Leicestershire market town
- the provision of free wi-fi within the town centre
- developing a platform, such as an electronic network which can be used to inform residents, businesses and key stakeholders of projects and plans in the town. This could be used as a key mechanism to coordinate community activity and keep the sense of community engagement and pride.
- delivery of a promotional campaign utilising social media (to local people as well as potential visitors)

Quality Enhancement Projects

- Particularly within the 'Four Squares' to make them pleasant public spaces which prioritise people e.g. potential removal of car parking in the squares and traffic calming such as zebra crossings replacing pelican crossings. Green infrastructure and sustainable transport should be at the heart of these improvements as well as allowing space for people to gather and socialise. Other ideas to improve the public realm might include improved signage/ information boards, new street furniture or public art installations. It will also be important to clarify the locations and links between the 'Four Squares' through maps, signage or visual pointers (such as markers, gateways or public art installations).
- Although not specified as a particular project, the general consensus is that the derelict and vacant buildings in Coalville are a key challenge. A project looking particularly at long-term and temporary solutions may be worth considering, for example coverings for derelict buildings, temporary art installations, and 'meanwhile' or pop-up uses.
- Restoring derelict buildings/ infill building developments - some projects have already been realised under this banner but others may need feasibility studies or further exploration. What might be useful is access to a fund to enable NWLDC to commission studies and ensure that it is making evidenced-based decisions on key building projects. There could be potential to explore a TCIM model approach similar to that piloted in Melton.

Regeneration Projects

- Establishing links between local businesses and local people, especially the young as a means to promote skills development and foster a network of communities. This could involve a community based project which brings together young people in alignment with local businesses and sponsors.
- Improving and linking greenspace and heritage assets e.g. heritage trails. This may link key iconic buildings and areas of heritage significance, or provide cycle/ walking routes linking green spaces of interest.
- Pop-up arts and cultural exhibitions, performances, and regular events particularly within the 'Four Squares' to increase footfall and encourage community pride in Coalville.
- The Shop front improvement scheme is already being delivered with approximately 25 potential applicants. If the project continues to be a success and demand is high, this scheme could be continued in conjunction with public realm enhancements.
- The leisure centre which is currently located in Whitwick could be relocated to the centre of town – providing a leisure and community focal point at the heart of the town, and bringing people to the centre for another reason other than for practical shopping or access to services. This also offers a re-development opportunity on the current leisure centre site.

Promotional Projects

- Promoting Coalville's successes and raising awareness of the shopping, services, activities and transport offer to current residents, new residents, businesses and potential investors. This is already underway for Project Coalville, however there may be an opportunity to further develop a brand, digital presence and a marketing campaign aimed not only at new residents and visitors but highlighting new initiatives and the offer for existing residents.
- A desire has been expressed to support local businesses and there appears to be a sense of local pride. There may be an opportunity to encourage and incentivise local support and pride – competitions, activities with schools, events, and public realm improvements involving local community.

6. EARL SHILTON AND BARWELL

Overview

6.1 Earl Shilton and Barwell are located to the north east of Hinckley on elevated land above the Soar Valley. Earl Shilton has a rich industrial history and was a prosperous village, accommodating a number of shoe, hosiery and knitwear factories in the 18th and 19th centuries. Barwell also saw considerable growth during this period, principally as a result of the shoe trade. From the 1970s the local shoe and hosiery trade encountered strong foreign competition, which led to the departure of many of the traditional manufacturing companies from the area.

6.2 The area contains deprivation, particularly relating to income, education skills and training, employment and health, and both centres are in need of regeneration. The most deprived parts of the two settlements are among the most deprived neighbourhoods in Leicestershire.

6.3 There is great rivalry between Barwell and Earl Shilton and no collaboration.

Town Centre Population

6.4 Table 6.1 below presents population data for the town centres of Earl Shilton and Barwell. The proportion of economically active residents in the town centre (75.8%) is above that of both the LLEP (63.1%) and GB (63.3%) comparators. Town centre unemployment (5.8%) is however more than double the average for the regional and national level, suggesting that whilst many people are willing able and actively seeking work in the town centre they are unable to get a job. The main reason for economic inactivity in the town centre is due to retirement (11.0%).

Table 6.1: Earl Shilton/Barwell Town Centre – Population

	Town Centre		LEP	GB
	No.	%	%	%
All usual residents 16-74	807	100.0%	100.0	100.0
Economically active	612	75.8%	63.1%	63.3%
Employed	489	60.6%	48.0%	47.4%
Self employed	65	8.1%	7.8%	8.9%
Unemployed	47	5.8%	2.7%	2.4%
Full Time Student	11	1.4%	4.6%	4.7%
Economically Inactive	195	24.2%	36.9%	36.7%
Retired	89	11.0%	20.5%	21.4%
Student	22	2.7%	7.2%	5.3%
Looking after home / family	33	4.1%	3.9%	3.9%
LT Sick / Disabled	40	5.0%	3.3%	3.9%
Other	11	1.4%	2.1%	2.2%

Source: Census Data, 2011

Indices of Deprivation

6.5 Of particular note are Barriers to Housing and Services (which is amongst the least deprived areas) and Education, Skills and Training (which is relatively deprived).

Table 6.2: Earl Shilton/Barwell Indices of Deprivation		
Deprivation Domain	National Decile (1 most deprived)	Leicestershire Rank (1 most deprived)
Overall	5, 4, 3	82, 50, 30
Income	5, 4, 3	80, 45, 14
Employment	6, 3, 3	119, 35, 15
Education, Skills and Training	4, 3, 2	94, 45, 11
Health and Disability	5, 7, 7	58, 117, 119
Crime	5, 3, 5	128, 52, 107
Barriers to Housing and Services	10, 9, 8	333, 279, 207
Living Environment	3, 6, 6	25, 108, 124
Source: English Indices of Deprivation (2015)		

Work Day Population

6.6 Table 6.3 illustrates the occupations of the workday population for Earl Shilton and Barwell. It is clear that the town centres accommodate above average proportions of individuals working in Routine Occupations and Small employers and own Account workers.

Table 6.3: Town Centre Work Day Population in Earl Shilton and Barwell			
Occupation	Earl Shilton and Barwell	LLEP	England and Wales
Higher managerial, administrative and professional occupations	6.5%	9.0%	10.2%
Lower managerial, administrative and professional occupations	12.8%	11.2%	20.8%
Intermediate occupations	11.8%	12.4%	12,8%
Small employers and own account workers	15.5%	8.5%	9.4%
Lower supervisory and technical occupations	9.6%	7.1%	6.9%
Semi-routine occupations	15.6%	14.2%	14.1%
Routine occupations	21.8%	13.6%	11.1%
Never worked and long-term unemployed	6.3%	5.5%	5.6%
Total Number	710	724,309	41.0m
Source: Annual Population Survey (2015)			

Town Centre Economic Value

6.7 Earl Shilton and Barwell town centres have a GVA of £56.0m, which amounts to 5.3% of the total for all of the market towns included in this study. There are nearly 1,300 people employed in the town centre. Average GVA per worker is £43,629 which is around 4% above the County-wide average.

Table 6.4: Value of Town Centre Economic Activity in ES&B			
	Workers	GVA £m	Proportion
Earl Shilton & Barwell	1,283	56.0	5.3%
Total	**25,197**	**1,061**	**100.0%**
Source: ONS figures and ERS analysis			

Strategic Context

6.8 The overall vision for Earl Shilton and Barwell is:

> *To see the development of sustainable communities with distinct identities and character, providing attractive and accessible living and working environments and thriving urban centres. The settlements will be well connected to Hinckley and the surrounding countryside and supported by infrastructure that encourages green living*

6.9 There are a number of spatial objectives that are related to that vision. The most relevant of these are:

- To retain and enhance employment opportunities in Earl Shilton and Barwell through protection of suitable existing employment sources and through the provision of new and diverse opportunities in the development of the Sustainable Urban Extensions.
- To increase and improve the range of retail provision in Earl Shilton and Barwell and ensure that the centres are capable of accommodating an increased number of visitors from the growing population. The centres will continue to support the role of Hinckley as the sub regional centre.
- To contribute to the enhancement of the public realm and appearance of the district centres of Earl Shilton and Barwell, providing more attractive places for users and investors.

6.10 The **Core Strategy** states that the four settlements of Hinckley, Burbage, Earl Shilton and Barwell act together as an 'urban area', with clear linkages between them, and all four settlements play a critical role in supporting Hinckley town centre in its role as a sub-regional centre.

6.11 The **Earl Shilton and Barwell Mission Statement** seeks "To make Earl Shilton a pleasant place to live, work and socialise". This mission statement is in keeping with the **Hinckley and Bosworth Borough Council Area Action** Plan, which includes a number of spatial recommendations for the area:

- To integrate the Urban Extensions with the existing communities and provide an inclusive, attractive and vibrant environment with a high quality of life for all residents.
- To increase and improve the range of retail provision and to ensure the centres continue to support the role of Hinckley as the sub regional centre.
- To contribute to the enhancement of the public realm and appearance of the centres of Earl Shilton, providing a more attractive place for users and investors.
- To provide green infrastructure which forms the heart of new communities with well-designed green spaces and links to the surrounding countryside and supports sustainable, healthy and active lifestyles for residents.

6.12 Earl Shilton Town Council is a key partner in the delivery of the Action Plan. Their focus is on creating an attractive and pleasant place for residents to live, work and socialise. They will do this by ensuring that the council owned green spaces are unique places for people to enjoy their free time; and to improve the social and visual aspect of the town centres. They will also provide support to HBBC, the Town Centre Partnership and Business Forum in their role of pursuing options for economic stimulation and inward investment.

6.13 In order to improve the social and visual aspect of the town centre, the Town Council will work with the Town Centre Partnership and groups responsible for public realm spending in Earl Shilton to deliver a distinctive and attractive town centre where people come to socialise and spend time.

6.14 The **Earl Shilton and Barwell Area Action Plan: Masterplan Options Report (2009**) was commissioned by the Borough Council. It formed the basis of a formal Area Action Plan for the two settlements.

6.15 Following a review of the over-arching Strategies and the requirements of the **Core Strategy** a number of key development and spatial objectives were identified that reflected the Vision, and established an agenda for the future development of Earl Shilton and Barwell.

6.16 In order to improve the appearance of the town centres, and hopefully in turn increase footfall, the **Earl Shilton Public Realm Strategy** puts forward the design concept to build upon Earl Shilton's existing character by using high quality, formal design to enhance its image.

6.17 A primary objective of the strategy is to reclaim the public realm from vehicles, which currently dominate and break up the linearity of Wood Street. The concept proposes a partly shared space, using modern street furniture that relies on the language of materials, rather than traditional highway traffic calming measures, to increase the legibility of the public realm. Following the opening of the by-pass, there has been a significant reduction in the amount of traffic which should permit these types of interventions.

6.18 A long term aspiration is to transform the town centre into a viable and sustainable place for living and working. As a response to the towns manufacturing heritage, the concept incorporates a 'thread and stitch' which runs along the extent of Wood Street as a unifying element and creates pockets of interest in key locations. The South side of this scheme has been carried out already, utilising funding from emda.

6.19 **Public Realm Strategy for Barwell** identifies the diverse, predominantly small scale architecture that spans several design ages, with the central area still acting as the village heart.

6.20 In developing proposals for improving Barwell village centre's public realm the local landscape character should be exploited; emphasising and capturing the 'historic' landscape qualities. Field patterns, colours and materials found locally within the surrounding area should be used to give the centre identity and structure.

Sustainable Urban Extensions (SUE)

6.21 As part of the **Core Strategy (2009)** the Borough Council examined seven broad options for housing growth in the Borough. A total of 8 areas to accommodate the growth were considered, two allocations of land south of Earl Shilton and land west of Barwell were chosen due to the least constraints to their development but also the benefits which would not occur were the development to take place elsewhere, namely providing a catalyst for the regeneration of Earl Shilton and Barwell.

6.22 It is essential that the development of the SUEs complements and contributes towards the regeneration of the existing district centres through the implementation of the AAP and masterplans

6.23 The SUE could contribute the following:

- Increased local demand for existing retail offerings and an opportunity to reduce the number of vacant units as a result
- An increase in local Council Tax (and Business Rates) receipts, allowing all key stakeholders serving Barwell and Earl Shilton greater financial opportunity to increase investment in these areas; and
- Increased demand for existing community and social facilities, leading to greater opportunity for self-investment and longer term sustainability

6.24 Through the development of the SUEs, it is proposed that Earl Shilton will have up to 1,500 new homes and 4.55 hectares of employment development and Barwell will have up to 2,500 new homes and 6.2 hectares of employment land (including infrastructure and education). These additional developments represent a significant increase in the local community populations and a step-changing opportunity to improve the economic prospects of the people currently living in the settlements.

6.25 **The Earl Shilton and Barwell Area Action Plan** states that due to the intended SUE, populations in Earl Shilton and Barwell are set to increase by 41% and 65% respectively due to new housing. For both settlements, this provides an opportunity for local centre retailers and investors to capitalise and improve the local retail offering.

6.26 Earl Shilton footfall is projected to increase by 12% in 5 years and 23% in 10 years. This is on the basis that there is no provision of a key attractor such as national retailer. 44% of business respondents stated that their turnover had decreased in the last year, 27% said it had stayed the same.

6.27 Barwell footfall is significantly below the regional level (63%) and the national level (65%). Population will increase by 19% in 5 years, and 48% over 10 years, resulting in footfall of 15% and 31% over the same timeframe.

6.28 **The Skills and Employment Study (2013)** produced for the Earl Shilton and Barwell Association found that:

- Earl Shilton: pockets of relative poverty and poor health. Incomes are lower than the national average and car ownership is lower.
- Number of shops: 103 (2012), 14% vacancy rate (although this is improving with 3 shops now under offer).
- Barwell – very similar situation. Number of shops 43.
- General quality of local businesses within the area seems poor, with little evidence of proactive thinking or ambition.

6.29 To assist with improvements to the Public Realm for the two District Centres of Barwell and Earl Shilton, a number of 'opportunity sites' have been identified which could, in principle, play an important role in the wider improvements to the centres.

6.30 These sites were identified to show:

- Their potential to improve character and identity in key locations
- That they are locations where new development has the ability to define and enclose key routes
- Their relationship to public realm improvement proposals and the ability to improve pedestrian circulation
- Their ability to provide car parking in close proximity to shops and other services; and
- Their ability to create public space with surrounding activity that could be used to host street markets or other events

6.31 The schemes should not be seen as the only options available for the development of the District Centres, nor should these opportunities be read as rigid schemes.

Table 6.5: Potential Development Sites

Earl Shilton		
Site	**Reason**	**Suggested Development**
Hardy and Draper, Wood Street	Important location, building does not fit with Character	New building with retail and residential use, present a more active façade
Co-op and adjacent buildings	Large car park associated with Co-op has created a lack of definition and activity on Wood street. Potential to redevelop this site/adjacent land to create more frontage to Wood Street, increasing activity, defining the street and improving its character.	A new food store/collection of smaller shops/residential development could be built with frontage to Wood Street and car parking to the rear.

Quality Hotel, Wood Street	Important location, building does not fit with character. Poor façade and access issues	New mixed use development. More active façade, improve pedestrian access
Stride Furniture Showroom, Wood Street	Important location, building does not fit with character. Poor façade	New building with retail and residential use, present a more active façade
Development Site at the corner of Wood Street and Land Society Lane	Collection of buildings surrounding a car park/delivery area presents a blank facade to Wood Street/Land Society Lane, reducing activity/architectural quality. Single storey height creates lack of definition to the street and fails to provide a landmark at the gateway to the main shopping street.	A new retail/residential development with frontage to Wood Street/Land Society Lane. This could be explored in tandem with the Co-op site or independently.
Barwell		
Constitutional Club	Large site in the centre of Barwell. Building façade not ideal or in keeping with the area	New retail premises/residential development/health care facilities. This could create new public routes. Development should complement George Ward Centre.
Top Range Motors	A small to medium sized site situated in a prominent location. Currently vacant and comprised of areas of hard standing and a 2 storey workshop. Fails to provide appropriate landmark in key gateway location, does not define the street or provide active facade.	New retail premises/residential development or a surface car park to facilitate better access to existing businesses in the village centre. Where appropriate development should ensure adequate footway and should accord with public realm.
The Co-op	Whilst the ground floor is well utilised and provides a valuable amenity to Barwell residents, the upper floors are inactive and their appearance is not in keeping with the area.	Redevelop entire building or remodel upper floors, retaining retail use on ground floor. Upper floors could suit a range of uses, including residential, commercial or healthcare.
Malt Mill Bank	Existing library is relocating and will leave a vacant retail unit with large car park to the rear. Taken as whole, this site presents a key opportunity in a prominent location.	New retail and/or financial and professional services based development with apartments on upper floors.
6-12 High Street	Under used retail premises close to Barwell village centre in good quality building.	Locate new retail/leisure uses or health care related activities on ground and potentially upper floors.
Bank Terrace	Employment uses located in predominantly residential areas close to the village centre.	Appropriate for private residential development or 'extra care' type development.

Retail Offer

6.32 Existing uses in Barwell District Centre are as follows:

- In Barwell there are 43 units, including a large convenience store with planning permission for a supermarket.
- The town provides a range of retail and non-retail services, including a bridal wear shop, discount and convenience store, flower shop, five hot food takeaways and financial services, excluding a bank but including a building society.
- The vacancy rate is 13.9%.

6.33 The existing uses in Earl Shilton District Centre are as follows:

- In Earl Shilton there are 89 retail units (February 2012).
- The town has a wide range of retail services, including household goods stores such as carpet, curtain and electrical appliance stores and jewellers.
- This is in addition to a range of non-retail services, such as six hot food takeaways, two cafés and a series of financial services providers.
- This centre also has a wide selection of community facilities including a health centre, church, dentist and library.
- The vacancy rate is 17.9%

Available Retail Expenditure

6.34 Population estimates and forecasts for the PCA have been drawn from the Pitney Bowes GeoInsight database. This provides estimates of population based on projections and the 2011 census for small, localised areas. Overall the population within the centre's respective PCAs is set out in Table 6.6.

Table 6.6:Forecast Population within Barwell and Earl Shilton PCAs		
Year	Barwell PCA (Zone 4)	Earl Shilton (Zone 6)
2016	13,636	13,146
2021	13,828	13,473
2026	13,967	13,807
% Growth '16-'26	2.4%	5.0%

6.35 Total available expenditure in the survey area in forecast years is a product of both population change and spending growth applying these trend-based projections. The outputs of this analysis in terms of available 'retail' expenditure, is set out within Tables 6.7 and 6.8 below.

Table 6.7: Forecast Available Retail Expenditure within Earl Shilton PCA			
Year	Convenience Goods	Comparison Goods	Total Available Retail Expenditure
2016	£25.6m	£40.0m	£65.6m
2021	£26.9m	£52.5m	£79.5m
2026	£28.3m	£69.0m	£97.3m
% Growth 16'-26'	10.4%	72.7%	48.4%
Source: Turley (2015)			

Table 6.8: Forecast Available Retail Expenditure within Barwell PCA			
Year	Convenience Goods	Comparison Goods	Total Available Retail Expenditure
2016	£27.1m	£42.9m	£70.1m
2021	£28.2m	£55.8m	£84.0m
2026	£29.2m	£72.3m	£101.5m
% Growth 16’-26’	7.7%	68.4%	44.9%
Source: Turley (2015)			

Current Shopping Patterns

6.36 Whilst now somewhat dated, the results of the most recent household survey indicate that Barwell retains approximately 9% (£2.4m) of convenience goods expenditure within its PCA. There is no survey data indicating the centre’s market share for comparison goods. This suggests it has a very limited comparison shopping function.

6.37 In contrast, Earl Shilton achieves a convenience goods market share of 28% within its PCA, equating to a convenience trade draw of £7.3m. For comparison goods, the centre attracts 5% of locally generated expenditure within its PCA equating to £2.0m. Overall therefore, the centre draws £9.3m retail expenditure from within its PCA, equating to an overall market share of 14%.

Summary

6.38 Although grouped together for this report, these are quite distinct centres each facing particular issues. As things stand, Barwell appears to be continuing on a downward trajectory. There is more optimism in Earl Shilton, cultivated not least by the reduction in vacancies, the influx of more independents and the early stages of the development of a themed shopping experience.

6.39 Capturing the interest of newcomers will be crucial in providing a boost to both towns. This needs to be achieved through a combination of activities that enhance the shopping and leisure experience.

SWOT Analysis: Barwell

Strengths	Weaknesses
• In a Conservation area • Attractive buildings • Council commitment to a clear vision	• Weak retail offer • A number of vacant units • Poor quality shop fronts • Poor quality public realm • Limited car parking
Opportunities	**Threats**
• Development opportunities to strengthen central role, with Council commitment to supporting site delivery • Public realm improvements • Redesign of a busy junction would free up development space • Improve village entrance • SUE, bring new housing and employment opportunities and increase village centre footfall	• New community centre not well connected and could draw people away from the centre • Lack of parking provision • Retail provision in SUE could deter people from village centre • Lack of key development sites • Convergence of a number of road junctions may hinder development • Constrained urban form may restrict improvements to pedestrian space • Proposed Tesco store may negatively impact other retailers

SWOT Analysis Earl Shilton

Strengths	Weaknesses
• Wide retail offer • Attractive Buildings • Good Parking Provision • Town Council • Business Forum • Voluntary groups • Council commitment to a clear vision	• Retail offer is ‘stretched’ throughout the centre • Poor quality shop fronts • Opening hours that are not customer friendly • Not pedestrian friendly • Poor quality public realm/public spaces • Pockets of deprivation
Opportunities	**Threats**
• Longer term Development Opportunities especially on the West of the town centre, with Council commitment to supporting site delivery • SUE, bringing new housing and employment opportunities and increasing village centre footfall • Encourage conversion of retail units for housing • Create a targeted implementation plan to bring forward key sites • Potential to expand and improve public spaces and connect them to the community park • Enhance pedestrian and cycle movement through the town • Opportunity for a new civic space on the existing site of the library and church hall • Consolidation of the retail offer	• Neighbourhood retail provision in SUE may diminish the impact of the village centre • New mixed use development may take a while to come to fruition in which time the centre may diminish further • Private landlords may be reluctant to redevelop their sites

Potential Projects

6.40 Each of the below are regarded as potentially viable projects, albeit it has not been possible to determine potential costs or the likelihood of securing funding. These projects are aimed at recapturing some existing resident spending, capturing a good proportion of the spending of those who will move into new homes being built in the area and generating higher levels of visitor spending. In this context, there is an opportunity to build on the Hinckley & Bosworth Town Centres Vision and HBBC’s commitment towards supporting site delivery that is made within it.

Digital Projects

- the development of a town centre website pulling together and adding value to the Town Council and Business Forums pages, linked to websites for other Leicestershire market town
- the provision of free wi-fi within the town centre
- developing a platform, such as an electronic network which can be used to inform residents, businesses and key stakeholders of projects and plans in the town. This could be used as a key mechanism to coordinate community activity and keep the sense of community engagement and pride.
- delivery of a promotional campaign utilising social media (to local people as well as potential visitors)

Quality Enhancement Projects

- Environmental improvements including those to enhance the public realm
- It was suggested that there would be merit in having a flexible fund to pay for minor but important improvements to shop fronts, street signage etc. and install bike racks.

Regeneration Projects

- Further consideration of the 'Opportunity Sites', as previously listed.
- There was a re-development opportunity relating to the Town Council and Methodist Hall buildings on the High Street, which could have included provision of public toilets. Section 106 monies could be used but the idea has not progressed because of the difficulties in getting partners to work together- thus demonstrating the need for a key sites officer.
- There is an aspiration to better link Wood Street and the adjacent park with the High Street by creating a walkway through the 1960's retail block .
- Review/reduce the primary retail frontage and convert to residential to increase the town centre population and boost the economy.

Promotional Projects

- Improving perceptions of the District Centres through 'Place Branding'
- Promoting the retail, services and leisure opportunities that are available in the District Centres, in particular to the occupiers of the new housing adjacent to the bypass.

7. HINCKLEY

Overview

7.1 Hinckley is located on the Leicestershire/Warwickshire border. Historically, the area's economy has been focussed around manufacturing including hosiery and textiles. However, since the decline of these industries, a largely service economy has developed in its place, characterised by low paid jobs and low level connections with the knowledge economy. This industrial transition has also seen a shift of workers from the town centre to out of town employment sites, including a Tesco Distribution centre, Alliance Healthcare and a newly opened DPD depot.

7.2 Whilst competing with neighbouring towns and out-of-town developments, Hinckley acts as a main shopping centre for a large proportion of the population. The Town Centre is defined by the Area Action Plan boundary and the Business Improvement District[16] falls within this boundary.

Town Centre Population

7.3 Only 218 individuals live within the town centre, as defined for the purposes of this study, although there are large areas of Victorian terraced housing immediately adjacent to the town centre. Of this total, 70.6% of the population are economically active with 50% employed. 12.4% of the town centres population are self-employed, which is higher when compared to the District level (11.1%), LLEP (7.8%) and national (8.9%) averages. Economic inactivity remains significantly lower than comparator areas.

Table 7.1: Hinckley Town Centre – Population

	Town Centre		LEP	GB
	No.	%	%	%
All usual residents 16-64	218	100	100	100
Economically active	154	70.6	63.1	63.3
Employed	109	50.0	48.0	47.4
Self employed	27	12.4	7.8	8.9
Unemployed	12	5.5	2.7	2.4
Full Time Student	6	2.8	4.6	4.7
Economically Inactive	64	29.4	36.9	36.7
Retired	24	11.0	20.5	21.4
Student	11	5.0	7.2	5.3
Looking after home / family	6	2.8	3.9	3.9
LT Sick / Disabled	20	9.2	3.3	3.9
Other	3	1.4	2.1	2.2
Source: Census Data, 2011				

[16] http://www.hinckleybid.co.uk/

Indices of Deprivation

7.4 Barriers to Housing and Services registers the most favourable score, but high scores for deprivation are recorded for 'Crime' (13th most deprived area in Leicestershire) and 'Living Environment' (the most deprived area in Leicestershire).

Table 7.2: Hinckley Indices of Deprivation		
Deprivation Domain	National Decile (1 most deprived)	Leicestershire Rank (1 most deprived)
Overall	3	13
Income	4	35
Employment	3	18
Education, Skills and Training	4	76
Health and Disability	4	32
Crime	2	13
Barriers to Housing and Services	8	230
Living Environment	1	1
Source: English Indices of Deprivation (2015)		

Work Day Population

7.5 Table 7.3 illustrates the occupations of the workday population in Hinckley. The town centre has a significantly higher representation of 'lower managerial, administrative and professional occupations' (29.9%) compared to LLEP (11.2%) and England and Wales (20.8%) averages. Similarly, intermediate occupations but 'never worked and long-term unemployed' are significantly lower than the comparator averages.

Table 7.3: Town Centre Work Day Population			
Occupation	Hinckley	LLEP	England and Wales
Higher managerial, administrative and professional occupations	13.6%	10.2%	11.3%
Lower managerial, administrative and professional occupations	30.2%	20.6%	22.9%
Intermediate occupations	23.4%	14.0%	14.0%
Small employers and own account workers	3.9%	9.6%	10.4%
Lower supervisory and technical occupations	3.5%	8.0%	7.6%
Semi-routine occupations	16.7%	16.1%	15.5%
Routine occupations	6.7%	15.3%	12.2%
Never worked and long-term unemployed	2.0%	6.2%	6.2%
Total Number	795	724,309	41.0m
Source: Annual Population Survey (2015)			

Economic Value of Hinckley

7.6 Hinckley's town centre has a GVA of £167.0m, which amounts to 15.7% of the total for all of the market towns included in this study. There are more than 3,800 people employed in the town centre. Average GVA per worker is £43,460 which is around 3% above the County-wide average.

Table 7.4: Value of Town Centre Economic Activity in Hinckley			
	Workers	GVA £m	Proportion
Hinckley	3,843	167.0	15.7%
Total	**25,197**	**1,061**	**100.0%**
Source: ONS figures and ERS analysis			

Strategic Context

7.7 The **Hinckley and Bosworth Community Plan 2002 – 2007** set out improvements over a five year period, and the longer term vision for what the Borough could be like in 2026. The plan formed part of the ACTIV8 project, which brought together public service providers alongside voluntary organisations, businesses and local communities. The overall aim was to improve local quality of life and a number of key issues and future improvements were raised through extensive consultations. This included a lacking entertainment and leisure offer across the District; a need to revitalise parks and recreational grounds and improvements to public transport and accessibility to town centres. These identified issues were considered to be priorities for the District moving forward.

7.8 In order to combat the decline of Hinckley Town Centre, the Council commissioned and adopted the **Druid Quarter Masterplan (2002**) to regenerate the old centre for the hosiery industry. Priorities included: the creation of new economic and employment opportunities; the retention and enhancement of the retail offer, and the improvement of the public realm and accessibility to the area over a 15 year period. As a result, several large projects were implemented, resulting in a more environmentally attractive area which was subsequently targeted by start-up businesses, design led companies and housing developers for relocation.

7.9 The **Hinckley Town Centre Renaissance Masterplan (2006**), identified a number of key development sites, where redevelopment would tackle a number of current issues. The Masterplan was based around seven strategic aims including increasing accessibility, enhancing the town centre's image, developing new leisure and cultural facilities and developing a public realm strategy. It provided potential uses and outputs for a number of each key sites including: Britannia Centre/Castle Street, Land North of Mount Road, Leisure Centre, Railway and Bus Station. It also identified a public realm strategy and the role that public art and street furniture could play in revitalising the town centre.

7.10 The **Economic Regeneration Strategy 2009 – 2014** for the Borough reflected ambitions stated within the Community Plan and was underpinned by a number of strategic objectives to 'achieve a thriving economy for the Borough'. Objectives included the need to develop a targeted approach to supporting business, and to secure an effective portfolio of sites/premises to meet the demands of businesses. Importance was also placed on increasing the vitality and viability of the key town, Hinckley alongside village centres across the borough.

7.11 Hinckley and Bosworth Borough Council established a **Local Development Core Strategy (2008 – 2026)** that set out policies to meet the community's economic, environmental and social needs for the future.

7.12 The **Strategy** put forward a number of policies in order to address local economic issues such as low paid jobs, over reliance on the service sector and rural diversification. Eleven spatial objectives were created, each with specific targets relating to the economy, community and the environment. The Regeneration of Urban Centres (Spatial Objective 2) in particular, aimed to:

> *"deliver the regeneration of Hinckley town centre as a vibrant, thriving sub regional centre, which provides opportunities for retail, leisure and commercial activities, whilst supporting the vibrancy and vitality of Earl Shilton, Barwell & Burbage as important local centres".*

7.13 In order to support Hinckley's role as a sub-regional centre the council aimed to:

- Support the expansion of the creative industries job market, in particular through the redevelopment of the Atkins factory into a Creative Enterprise Centre.
- Require the redevelopment of the railway station site to deliver a transport interchange and improved facilities at the Hinckley Railway Station.
- Support the provision of a new bus station plus efficient provision and management of town centre car parking and transport to reflect Hinckley's role as a sub-regional centre.
- Require new development to enhance the poor public realm within the town centre.

7.14 The **Hinckley Town Centre Area Action Plan (2011**) formed part of Hinckley and Bosworth's Local Development Framework and updated some of the proposals contained in the Hinckley Town Centre Masterplan, to provide a planning framework up to 2026. The vision for centre is:

> *"Hinckley town centre will provide a welcoming image, promote design excellence, attract new investment and create a high quality environment that respects (or builds on) its cultural heritage and character where people would want to live, work, shop and visit in order to fulfil Hinckley's role as a sub-regional centre."*

7.15 The Area Action Plan identified nine Strategic Development Areas, which through their redevelopment would contribute and support the overall vision. Each site was chosen due to the wide ranging regeneration impacts and included areas such as:

- **Concordia Theatre** – provision of a mixed use development incorporating office and commercial floorspace, new landscaped public open space and consolidated car park.
- **Atkins Factory** – retention and enhancement of car park, mixed uses of Atkins Building including office space and a creative enterprise centre.
- **Leisure Centre** – landmark residential scheme, soft landscaping scheme and improvements to pedestrian links.
- **Railway Station –** office led development to create high quality employment zone, active frontages onto railway station and forecourt, creation of transport interchange and provision of enhanced passenger facilities.

7.16 As part of the Local Development Framework, a **Shopping and Shop Front Supplementary Planning Document (2007)** provided further guidance to a number of local policies. The key objective was to improve the quality of town centres by ensuring new shops fronts and signage were consistent, and to the highest quality. Furthermore, it aimed to ensure the correct balance and mix of retail and non-retail uses in the town and district centres so that they remain vibrant during the day and for the evening economy. Overall, the Town Centre Masterplan and other supporting documents proved to be a turning point, providing a clear vision for the economic and cultural role the town could play.

7.17 A **Business Improvement District** in the town centre was established in 2008. Two thirds of businesses voted in favour of the initiative and it has been subsequently managed by the Hinckley Town Centre Partnership. Investment was sought through a levy on business rates, providing £1 million funding over a 5 year period on project themes such as marketing and promotion, events and visitor services and business development. One key project, the Hinckley Loyalty Card has 5,500 people registered.

7.18 In 2015, a new town centre regeneration plan was developed, building on the success of the Hinckley Town Centre Renaissance Masterplan. The new plan intends to focus on key areas in need of regeneration within Hinckley but also broaden its scope to other village centres such as Barwell and Earl Shilton. The key sites of interest include: Britannia Centre, Cultural Quarter (Stockwell Head) and Middlefield Lane former depot site in Hinckley.

Progress against strategic objectives

7.19 Large parts of the 2006 Masterplan have been successfully delivered which has started to create a positive attitude towards and perception of Hinckley. The longer term effects of these development is yet to be seen, as the BID monitors three Key Performance Indicators - footfall, market stall revenues and parking revenues - and since 2008 each of the three have fallen by 25%, due to changes in the retail landscape.

7.20 The **Hinckley & Bosworth Borough Council Investor Prospectus (2015)** illustrates that Hinckley has gone through a transformational period, with an investment of over £1 billion that hopes to create approximately 10,000 jobs in Hinckley town centre. Recent developments have included:

- Development of the Atkins Building which is now a centre for local creative businesses;
- A new Hinckley campus for North Warwickshire and Hinckley College, providing courses that range from creative arts to warehousing and distribution;
- The Crescent a public/private sector partnership town centre retail development which includes a new cinema, bus station and a collection of retail and leisure units;
- A state of the art sports and leisure Centre at Argents Mead; and
- Hinckley Hub, landmark building for Borough, County Councils, Job Centre Plus and Citizens Advice Bureau.

7.21 The **Atkins Building** is a former hosiery factory in the centre of Hinckley built in the 1870s. In 2008 it was bought by the Borough Council and, using funding from the Regional Development Agency, was transformed into a creative business centre. The 45,000 sq. foot building includes a fully occupied enterprise centre, a café, meeting rooms and an art gallery for temporary exhibitions. It is felt that there is potential for the centre to be utilised further by members of the public, for example using the café facilities and visiting the exhibitions.

7.22 Adjacent to the Atkins Building is a new campus for **North Warwickshire and Hinckley College** which opened in 2011. The £13m development hosts over 650 students studying a range of creative arts disciplines. Whilst the students are reportedly not frequent users of shops and other services other than fast food outlets they, and the building, are a key addition to the vibrancy of this area of town.

7.23 The master planning in Hinckley led to the development of The Crescent, a major £60m shopping and leisure scheme which opened in autumn 2015. Research at the planning stages revealed a large amount of leakage of retail and leisure trade within the potential catchment areas (Roger Tym and Partners, 2007). **The Crescent** has added 200,000 sq. ft. of leisure and retail premises including a five screen multiplex cinema, retail, five family restaurants, underground parking and a bus station development at Waterloo Road. The complex currently houses well-known brands such as a Sainsbury's supermarket, Costa Coffee, TK Maxx and a number of food outlets including Prezzo. Of the 25 units available, nearly 70% have already been let or are under offer.

7.24 The Crescent development is considered a key achievement by stakeholders as it aligns well with elements previously considered missing from Hinckley including: encouraging a family-oriented evening economy and complementing the well-regarded range of independent stores with brand names. The location and proximity of The Crescent to the train station and inclusion of the bus station also aims to 'bring the town closer' to transport hubs.

7.25 The Hinckley Hub programme of works resulted in the regeneration of vacant and derelict industrial site to create 4,200 sq. m. of office and shared workspace for public services. The Hub includes Job Centre Plus, Hinckley and Bosworth Borough Council (HBBC) and other public services. The movement of HBBC (and around 300 jobs) to the edge of the town centre in 2013 reportedly had a negative effect on lunchtime trade. The main rationale was to regenerate a key gateway site - a former hosiery building which meant that HBBC vacated the Argents Mead site for the new leisure centre development. Whilst the transition period between the two has left a gap, the overall effect will only be identifiable in the longer term.

7.26 In 2006 the installation of a bandstand and improved landscaping and paths at Argents Mead Park opened up the Mead area to the town centre. The Council offices at Argents Mead were demolished in 2014 and the site has been redeveloped into new a £15m 'state of the art' leisure centre which is now open.

7.27 In addition to town centre developments, business and enterprise developments on the edge of town include:

- **Greenfields Business Park** – construction of around 3,700 sq. m. of high quality 'BREEAM excellent-rated' light industrial and hybrid employment space.
- **DPD trading division of GeoPost UK** has opened a parcel delivery hub at Hinckley Commercial Park in November 2015 creating close to 1,000 new jobs.

Retail Offer

Retail Composition

7.28 Drawing on the most recent survey undertaken by Experian Goad (August 2014), the town centre comprises approximately 275 retail units. The retail offer in the centre is largely focused around the Britannia Shopping Centre, located off the pedestrianised section of Castle Street.

7.29 The centre's convenience goods offer comprises a total of 18 units which is below average. Closer analysis indicates a reasonable mix of goods on offer with representation from bakers, butchers, greengrocers and grocery stores and general convenience stores. This offer has since been supplemented by the new Sainsbury's foodstore, which opened in November 2015 as part of The Crescent retail and leisure scheme. Most of the convenience offer is on the town centre outskirts – Lidl, Tesco, Morrisons, Aldi and Asda.

Table 7.5:Hinckley Town Centre Retail Composition

Retail Category	No. Units	% of Total	UK Average (%)	Variance
Convenience	18	6.5%	9.2%	-2.7%
Comparison	125	45.5%	39.8%	+5.7%
Service	99	36.0%	37.4%	-1.4%
Vacant	28	10.2%	12.4%	-2.2%
Miscellaneous	5	1.8%	1.2%	+0.6%
TOTAL	**275**	**100%**	**100%**	**-**

Source: Experian Goad (August 2014) / 2015 UK Average (Experian Goad)

7.30 The centre has marginally below average representation from service operators. Whilst below average, there are a notable number of restaurants, cafes and fast food outlets (31) and hair and beauty salons (29) within this category. There is also above average representation from operators within financial and property services.

7.31 The vacancy rate has remained below average which shows a degree of resilience in the context of changing consumer trends.

7.32 Overall, Hinckley town centre offers a reasonable mix and choice of retail uses based on the survey undertaken in 2014. Furthermore, this will have been boosted by The Crescent development of which the new Sainsbury's foodstore is already open and trading. Vacancy rates have remained below average over the period 2006-2014 which also shows good resilience in in the aftermath of the recession and in the context of changing trends.

Available Retail Expenditure

7.33 Having regard to the results of the Household Survey of shopping patterns underpinning the Hinckley & Bosworth Retail Capacity Study (September 2007), the primary catchment area (PCA) for Hinckley has been defined as comprising Zones 1 and 2 of the defined Study Area.

7.34 Population estimates and forecasts for the PCA have been drawn from the Pitney Bowes GeoInsight database. This provides estimates of population based on projections and the 2011 census for small, localised areas. Overall the population within the PCA is currently 49,452. This is forecast to grow to 54,652 by 2021 and to 53,708 by 2026. This equates to an overall projected growth of 8.6% over the next 10 years.

7.35 Total available expenditure in the survey area in forecast years is a product of both population change and spending growth applying these trend-based projections. The outputs of this analysis in terms of available 'retail' expenditure, is set out within Table 7.6 below.

Table 7.6:Forecast Available Retail Expenditure within Hinckley PCA

Year	Convenience Goods	Comparison Goods	Total Available Retail Expenditure
2016	£97.4m	£154.8m	£252.1m
2021	£104.2m	£207.2m	£311.4m
2026	£111.1m	£276.0m	£387.1m
% Growth 16'-26'	14.1%	78.4%	53.5%

Source: Turley (2015)

Current Shopping Patterns

7.36 Not all available expenditure generated within the PCA will be spent within Hinckley town centre. The results of the 2007 household survey indicate that the town centre retains approximately 43% of comparison goods expenditure (£66.4m) generated within the PCA. This implies that approximately 57% (£88.4m) comparison goods expenditure generated within the PCA is currently leaking to other retail destinations such as Leicester and Fosse Park. These shopping patterns are likely to be influenced by new development at The Crescent.

7.37 There is no similar evidence available for convenience goods given the limited range of convenience provision in the town centre at the time of the survey. The recent opening of the town centre Sainsbury's will influence localised shopping patterns within the PCA and will enhance the centre's overall market share.

Local Perceptions on Potential for Improvement

7.38 Attitudinal questions were asked as part of the 2007 Household Survey, which explored the extent of potential areas for improvement within the town centre.

Table 7.7: Suggested Improvements

Improvement	Proportion of Respondents
More national multiple retailers	30%
Better choice of shops in general	30%
Better quality of shops	16%

7.39 A **Retail Capacity Study (2007)** demonstrated that the town centre had some key deficiencies including limited convenience and comparison retail offer, static retail rents, lack of suitable and available premises to accommodate interested retailers. Furthermore, the town centre had a high leakage of activity to other centres and that accessibility to the centre was poor e.g. lack of train and bus station facilities, availability of parking, etc. which meant visitors were going elsewhere.

7.40 However, a number of successful Council initiatives (including the creation of a Business Improvement District) helped to dramatically improve the situation, and the Council was awarded Beacon Status. The area has become more pedestrian friendly, and town and farmers' markets are held within the centre. In 2010, Hinckley was awarded the National Outdoor Market of the Year at the National Association of British Market Authorities awards.

Summary

7.41 Overall, Hinckley offers a reasonable mix and choice of retail uses. In addition, this will have been boosted by The Crescent development of which the Sainsbury's is now open and trading. This is likely to have substantially improved the town centre's convenience market share which was negligible at the time of the previous household survey in 2007. The centre has a relatively good comparison market share (43%) based on the 2007 survey evidence and whilst this indicates some leakage, as with convenience goods, recent investment in the town centre is likely to enhance the centre's overall market share and expenditure retention moving forwards.

7.42 A key risk in the short to medium term is that the Co-op department store site remains vacant and deteriorates. Furthermore, the Co-Op has the only car park at the top end of Castle Street which now cannot be used. Footfall data collected by the BID are already demonstrating that town centre footfall is declining since the closure of the Co-Op in that area of the town centre.

7.43 The best case scenario is considered to be a replacement department store to take its place, however temporary uses such as pop up shops would be preferable to an empty site. Given the perceived challenges of filling a large store the suggestion is to split it down into smaller units more suited to independent retailers.

7.44 Another desirable outcome would be that a hotel locates at the Co-op site. A previous barrier to a hotel development (other than the existing Premier Inn on the outskirts of town) was considered to be the lack of evening entertainment. Consent was given for a hotel at the High Cross Building, however the development did not come forward. Improvements in the evening entertainment offer, offered by the Crescent could prompt renewed interest in a hotel, potentially linking to the family tourism offer of Twycross Zoo, Mallory Park and Bosworth Battle Field.

7.45 The market is highly regarded and provides a real opportunity for growth alongside an events programme including early evening. It can be a complex process to put on an event; therefore it would be beneficial to local community groups to create a package to make it easier to host an event.

7.46 Whilst stakeholders and businesses report that local people have a tendency to criticise Hinckley, the town centre appears to be well used and the locally-led events (e.g. the Carnival) demonstrate good community spirit. The main criticisms are around the physical appearance being plain or poor due to a lack of heritage/landmark buildings, a limited variety of high quality shops as well as a lack of parking. A priority for the town is therefore considered to be ensuring the older buildings are well maintained, rather than allowing them to deteriorate and spoil the physical appearance of the town. A Townscape Heritage Initiative is in development to apply for funding from Heritage Lottery.

7.47 Hinckley still bears elements of historical social and economic deprivation and despite a period of regeneration with major projects nearing completion, the town needs to sustain momentum for these projects to halt decline. Regeneration projects such as The Crescent have just been completed; there is likely to be some lag time in terms of any impacts materialising as a result of this investment. Therefore, it is important that investment remains focussed on the overall future vision for the centre, gradually building a most positive reputation around the town.

7.48 Overall, the town centre has respectable economic activity levels, with many individuals employed in professional and lower managerial roles. The area still experiences pockets of deprivation, particularly in relation 'living environment' which is was ranked most deprived. This may negatively impact the atmosphere and perceptions of the centre. In order to improve the quality of life within Hinckley, it is not enough to attract investment and employment opportunities, the local environment and atmosphere will need to be addressed.

7.49 In relation to the core offer, the street market provides a key attraction to the town, but requires some targeted action to ensure it reaches its potential, for example by focusing on specialist or niche products.

7.50 Vacancy rates are currently at 5% indicating a positive trend however the town is collectively concerned about the impact of the closure of the Co-op department store in January 2016. The role of the new Sainsbury's as an anchor store has increased importance in drawing in the local catchment. The Council is working hard to address the potential of the whole Co-op site. The BID has also negotiated with Arriva to ensure that during June and July it will offer free bus travel to Loyalty Card holders between the Bus Station in the Crescent, regent Street and the top of Castle Street.

7.51 Key risks are perceived to be ensuring the road transport and pedestrian routes through the town adapt to the new leisure and retail developments at The Crescent and Argents Mead. A widespread concern amongst businesses is that footfall and thus customers will be drawn away from existing shops as an unintended consequence of the new development. The quality and offer of independent shops is considered to be strong, so targeted actions at marketing and signposting rather than changing the existing offer ought to be carried out.

SWOT Analysis

Strengths	Weaknesses
Variety of independent retailers • Main shopping centre in the district – serves local villages The Business Improvement District activities and engagement Fantastic team cleaning the streets keeps the town looking nice. Free Wi-Fi Theatre New cinema	Low quality and inconsistent public realm, which lacks a heritage focus or historical landmarks High level of out-commuting Limited cultural offer/evening entertainment (expected to be addressed in large part by The Crescent development) Notable vacant property (Co-op) Lack of engagement with transport providers Gap in retail offer (mens and teens)
Opportunities	**Threats**
Housing growth Create a targeted implementation plan to bring forward key sites, with Council commitment to supporting site delivery Evening economy Tourism Supporting street market to adapt FE (&HE) expansion Creative Industries through the redevelopment of the Atkins Buildings Improve connectivity to rest of County through redeveloping rail and bus	Transition during the opening of new retail and leisure developments Linkages between new development sites (both road and pedestrian) Redundant buildings Possible Fosse Park Expansion

Potential Projects

7.52 Each of the below are regarded as potentially viable projects, albeit it has not been possible to determine potential costs or the likelihood of securing funding. These projects are aimed at recapturing some existing resident spending, capturing a good proportion of the spending of those who will move into new homes being built in the area and generating higher levels of visitor spending. In this context, there is an opportunity to build on the Hinckley & Bosworth Town Centres Vision and HBBC's commitment towards supporting site delivery that is made within it.

Digital Projects

- Link the BID web-site to a county-wide network of other Leicestershire market towns and utilise Hinckley as a demonstrator as to what can be achieved.
- Hinckley BID is already developing an electronic network which can be used to inform residents, businesses and key stakeholders of projects and plans in the town as it is about to install wayfinder interactive screens that can be used to display community messages. This could be used as a key mechanism to coordinate community activity and keep the sense of community engagement and pride. There is a need to better link the Bid, Town Centre partnership and HBBC web-sites to respond to the needs/address the interests of the community.
- Delivery of more promotional campaigns utilising social media (to local people as well as potential visitors), possibly using students on placements from the College.

Quality Enhancement Projects

- Support to help businesses adapt to the wider market changes and challenges (internet shopping) as well as local change (e.g. capturing the early-evening market). The Bid has been offering small grants to new businesses as they come into the town for signage or shop front improvements and they offer to produce basic websites for new businesses.
- Public realm improvements.
- Improved signage within the town e.g. interactive maps, improved signage between new developments and existing parts of town.
- A review of transport i.e. key junctions, gateway signage, and smart signage for car parks and a development of a strategy for improvement.
- Upgrading older parts of the town so that they are consistent with the new developments

Regeneration Projects

- Initiatives should continue to develop the sites identified in the master planning (e.g. the Britannia Shopping centre). The recent growth in business presence in the town is very positive, therefore further enhancements to enterprise growth such as incubation space (such as at the Atkins building) or the creation of an Enterprise Zone would capitalise these positive trends.
- Completion of the works to Regent Street
- Review/reduce the primary retail frontage and convert to residential to increase the town centre population and boost the economy. This can be delivered in conjunction with the Heritage Townscape Project.

Promotional Projects

- As the town has experienced a significant amount of development recently a focus for Hinckley is on promoting what is on offer e.g. leaflets and maps.

8 LOUGHBOROUGH

Overview

8.1 Located between Nottingham (14 miles), Leicester (10 miles), and Derby (15 miles), Loughborough enjoys excellent access to the three major cities of the East Midlands and beyond through its good rail, road and air connections (via nearby East Midlands airport).

8.2 Uniquely amongst the market towns, Loughborough is home to a University. Loughborough University has distinctive strengths in terms of sports/sports medicine and also engineering, with several national research centres linked to sports.

8.3 Recent trends have shifted employment away from the town's traditional textile and engineering base into pharmaceuticals, general manufacturing, services and distribution. 3M has a major presence in the town, and Loughborough University is now a major asset to the local economy (employing 3,000 people). For many years AstraZeneca was a major employer but its closure and the loss of around 1,400 well paid jobs was said by town centre businesses to have been felt in the local economy.

8.4 Loughborough is identified as one of the five growth areas listed in LLEP's SEP. This growth area will draw together key economic growth priorities including the knowledge-based employment opportunities at Loughborough University Science and Enterprise Parks and the Charnwood Campus. It will also facilitate the development of housing growth at Loughborough and Shepshed and the supporting infrastructure required to facilitate these developments.

Town Centre Population

8.5 Within the town centre itself, only 45.2% of residents are economically active which is significantly lower than comparator areas (LEP 63.1% and GB 63.3%). One of the main reasons for this is because 13.6% of residents are full-time students, which is to be expected due to the proximity of Loughborough University to the centre. Furthermore, in terms of economic inactivity, the town centre has a higher than average rate (54.8%) due to the large number of students (46.2%).

Table 8.1: Loughborough Town Centre – Population

	Town Centre		LEP	GB
	No.	%	%	%
All usual residents 16-64	809	100.0%	100.0	100.0
Economically active	366	45.2%	63.1%	63.3%
Employed	204	25.2%	48.0%	47.4%
Self employed	19	2.3%	7.8%	8.9%
Unemployed	33	4.1%	2.7%	2.4%
Full Time Student	110	13.6%	4.6%	4.7%
Economically Inactive	443	54.8%	36.9%	36.7%
Retired	15	1.9%	20.5%	21.4%
Student	374	46.2%	7.2%	5.3%
Looking after home / family	17	2.1%	3.9%	3.9%
LT Sick / Disabled	19	2.3%	3.3%	3.9%
Other	18	2.2%	2.1%	2.2%

Source: Census, 2011

Indices of Deprivation

8.6 As perhaps to be expected for a relatively large town centre, there is a great deal of variation between town centre areas. For example, the town centre contains areas which suffer greatly with employment deprivation whilst other parts of the centre are amongst the least deprived nationally. There is clearly a pocket of very considerable deprivation in the town centre covering many domains.

Table 8.2: Loughborough Indices of Deprivation		
Deprivation Domain	National Decile (1 most deprived)	Leicestershire Rank (1 most deprived)
Overall	1, 3, 3, 6	1, 27, 32, 123
Income	1, 4, 4, 9	1, 62, 60, 279
Employment	1, 5, 5, 10	1, 63, 74, 377
Education, Skills and Training	1, 6, 4, 10	4, 180, 87, 280
Health and Disability	1, 6, 3, 8	1, 88, 14, 241
Crime	1, 1, 1, 2	1, 2, 7, 14
Barriers to Housing and Services	5, 7, 5, 3	98, 177, 108, 57
Living Environment	3, 1, 2, 2	31, 4, 17, 16
Source: English Indices of Multiple Deprivation		

Town Centre Work Day Population

8.7 Table 8.3 illustrates the occupations of the workday population in Loughborough, whereby most workers are employed in 'lower managerial, administrative and professional' and semi-routine occupations. In terms of higher managerial roles, it also has a strong representation (11.8%) similar to that of national averages (11.3%). This may well include people who work at the University but live in Town Centre The centre boasts lower rates in terms of those individuals that have 'never worked and long-term unemployed' (1%) in comparison to LLEP (6.2%) and national (6.2%) averages.

Table 8.3: Town Centre Work Day Population			
Occupation	L'borough	LLEP	England and Wales
Higher managerial, administrative and professional occupations	11.8%	10.2%	11.3%
Lower managerial, administrative and professional occupations	26.9%	20.6%	22.9%
Intermediate occupations	15.2%	14.0%	14.0%
Small employers and own account workers	5.5%	9.6%	10.4%
Lower supervisory and technical occupations	8.4%	8.0%	7.6%
Semi-routine occupations	21.7%	16.1%	15.5%
Routine occupations	9.6%	15.3%	12.2%
Never worked and long-term unemployed	1.0%	6.2%	6.2%
Total Number	4,019	724,309	41.0m
Source: Annual Population Survey (2015)			

Economic Value of Town Centre

8.8 Loughborough's town centre has a GVA of £199.4m, which amounts to 18.8% of the total for all of the market towns included in this study. There are more than 5,000 people employed in the town centre. Average GVA per worker is £39,506 which is around 6% below the County-wide average.

Table 8.4: Value of Town Centre Economic Activity in Loughborough

	Workers	GVA £m	Proportion
Loughborough	5,048	199.4	18.8%
Total	**25,197**	**1,061**	**100.0%**

Source: ONS figures and ERS analysis

Strategic Context

8.9 **Charnwood Regeneration Strategy** identifies the priorities for physical regeneration in the area. It is part of the mechanism for delivering the Council's long term Vision for the Borough. It takes into account the Council's established planning policy framework, its overall corporate strategy and sub regional priorities. The Strategy identifies seven key locations for regeneration activity, including:

- Loughborough Town Centre: Baxter Gate & the Inner Relief Road Corridor;
- Loughborough Town Centre: Devonshire Square;
- Astra Zeneca site & Dishley Grange; and
- Loughborough's Industrial Heritage Quarter.

8.10 The **Loughborough Town Centre Masterplan** developed in 2007 has the following vision:

"Loughborough Town Centre will be a successful, attractive and vibrant place and improve its relative position in the hierarchy of town centres year on year".

8.11 The Masterplan describes the Town Centre as relatively compact, centred on the pedestrianised Market Place and Carillon Centre. The opening of the Rushes Centre extended the core shopping area. Traditional squares and spaces also remain (Bedford Square, Devonshire Square, Derby Square and Ashby Square) although many of these have traffic and parking issues.

8.12 Key issues to be addressed by the Plan include responding to new ways of shopping, the accessibility of the town centre, the quality of its environment and creating new investment opportunities. There is a need to ensure a good mix of uses in new development that will be attractive to a wide range of groups. The evening economy is important and diversification is a key to ensuring that the 'drinking culture', and the potential for anti-social behaviour associated with it, does not dominate. Charnwood Borough Council are currently refreshing the Town Centre Masterplan.

8.13 The **Charnwood Retail & Town Centre Study** (2013 Update) analysed the retail offer of Loughborough and found it to have a good diversity of uses, which enable people's day to day shopping needs to be met. It noted a total of 498 retail units in use in the town centre.

8.14 The LLEP SEP mentions **Loughborough University Science & Enterprise Parks** as an "exceptional opportunity" to develop an internationally significant centre for knowledge based employment. Already one of the largest developments of its kind, the site will be the largest science park in the UK and will provide as many as 4,000 additional jobs and lever private investment of up to £200m. There is a necessity to ensure early linkages are made between this site and the town centre to encourage as many people as possible to use the town centre and are aware of its diverse offer.

Progress against Strategic Objectives

8.15 Significant progress has been made with the Masterplan, with the completion of the Inner Relief Road and bus hubs as well as the creation of new pedestrianised areas and public realm improvements. The former General Hospital site has attracted a major investment in the form of a multi-screen cinema and restaurant complex, scheduled for opening in May 2016, which is encouraging further investment in Baxter Gate. Key areas of the Masterplan still to be carried forward include public realm improvements to Devonshire Square/Bedford Square, the progression of sites for redevelopment off Devonshire Square, Pinfold Gate and Leicester Road, and the related enablement of a multi-storey car park. In addition, Loughborough Eastern Gateway (a development scheme around the Railway) has been completed; there is a view that links to the town centre need to be improved.

8.16 Town centre pedestrianisation in particular was regarded by consultees as a key asset, providing a venue for a variety of activities and events designed to encourage footfall. For example, the Christmas Market is reported to attract very large numbers of people. Consultees reported a sense of the town moving forward and of growing optimism. There is a hope that the quality of the public realm in the core of the town could be extended to other areas.

Other Consultations

8.17 A 2006 survey of Loughborough Town Centre users found a very high level of overall satisfaction with the Town as a place to shop, visit and work in:

- 85% of respondents were satisfied or very satisfied.
- 31% of people thought that the town had got better over the previous 12 months while only 7% thought it had got worse.
- When asked to describe Loughborough the most commonly agreed words "busy", "friendly", "safe", "crowded", "attractive" and "vibrant".

8.18 In terms of what would encourage people to visit Loughborough more often:

- 75% said a wider range of shops and retail facilities,
- 51% said more cultural or entertainment facilities
- 50% said free parking

8.19 The following factors are considered to be important in making Loughborough Town Centre the kind of place it is:

- The large, pedestrianised Market Place - ideal for events
- It is "walkable" and easy to comprehend
- The twice weekly Market and specialist markets in the heart of the Town
- Its rich mix of architecture – Georgian, Victorian, Art Deco and modern
- The presence of an internationally renowned University and a large student population
- The high quality green spaces in the centre - Queens Park, Southfields Park, the Parish Green
- Its mix of quality independent shops and national chain stores
- A wide range of bars, restaurants and cafes and a thriving evening economy
- The presence of civic, cultural, leisure, entertainment and administrative facilities reflecting its status as a sub-regional centre
- The town's ethnic and cultural diversity
- The November Street Fair

8.20 Further comments from the 2006 Business Confidence Survey showed the desire of businesses to see an improved retail offer in the town, as well as lower rents. The retail offer was thought to be dominated by coffee shops, hairdressers, pound shops and charity shops – with a lack of variety and a shortfall of medium and higher-order shops. In addition, it was thought that the reduction of rents/business rates, as well as focusing on raising local awareness through online advertising and deals, would attract more business to the area and improve overall profitability. These views were reinforced in business consultations as part of this study.

8.21 The Business Confidence Survey also suggested crime was an issue with business owners reporting higher than average levels of crime had affected their business (38% of businesses affected compared to 24% regionally and 29% nationally). Crime was heavily biased towards shoplifting (58%) and criminal damage (42%). However, this finding should be balanced against other, later, research which noted no problems for this issue. Consultations for this study revealed growing unease at aggressive begging and a concern that this might discourage town centre users. The BID is actively working with partners including the Police and CBC to address this.

8.22 The 2006 Visitor Satisfaction Survey revealed:

- 29% of visitors to the town described the main purpose of their visit as being for work (relatively high compared to regional and national averages).
- 17% of visitors to the town did so to use services.
- 16% of visitors did so for convenience shopping
- 15% of visitors did so for comparison shopping
- 1% of visitors did so for leisure.

8.23 These surveys and consultations for this research identified a need for a more cohesive public realm throughout the town centre, to assist in leading visitors to the various key attractors. For example, a consistent approach to signage, seating, litter bins etc. as well as the provision of maps at key points. There were also calls for more seating in an attempt to create a more continental atmosphere.

8.24 A series of interviews conducted as part of the Charnwood Retail & Town Centre Study (2013 Update) captured what was required to help Loughborough town centre's competitiveness. Key responses are summarised below.

Leicester, Nottingham and Fosse Park

The close proximity of major shopping centres with free or easy car parking and leisure offer draws spend away from Loughborough. Loughborough should celebrate its uniqueness and ensure it is more easily accessible by car or public transport and provide suitable facilitates to encourage longer stays in the town centre.

Lack of Quality Retail and Leisure Offer

A lack of suitable facilities means the town centre has limited success in drawing higher income residents from more affluent parts of the catchment area.

Lack of Student offer

A factor holding back the daytime economy was thought to be a lack of offer to attract students.

Town Centre Experience

Under-investment means parts of the town centre were looking tired and uninviting. In addition, certain opportunity sites are no closer to delivery, there are cases of declining footfall in certain parts of the town and some independent retailers were struggling to keep businesses viable. The Bid through initiatives such as events are trying to attract footfall to other areas and in the opening of Bleach Yard they are trying to improve the retail circuit to Wards End.

The increasing presence of value shops in prime retail areas

This was thought to be reducing the potential to attract higher spend residents and students. This is not unique to Loughborough and is happening all over the country.

Retail Offer

Retail Composition

8.25 Drawing on the most recent survey undertaken by Experian Goad (June 2015), the town centre comprises approximately 399 retail units. This is significantly fewer than recorded in the Charnwood Retail & Town Centre Study (2013 Update) which it is assumed is due mainly to differences in definition of the town centre, but may also reflect the conversion of some retail units to other uses.

8.26 The town centre is relatively compact, with the main retail offer focused within Carillion Court and the Rushes Centre and around the pedestrianised Market Place. Beyond the primary retail area, Wards End, Market Street, Devonshire Square, Church Gate, Baxter Gate and Biggin Street represent supportive secondary shopping streets.

8.27 A recently opened Morrisons Local store on Devonshire Square is well used with most larger food stores are edge of Town Centre or out of town.

8.28 The centre's convenience goods offer is marginally below average. Closer analysis indicates that this is largely dominated by bakeries, grocery stores and general convenience stores, with limited representation from butchers and off licences.

Table 8.6 Loughborough Town Centre Retail Composition

Retail Category	No. Units	% of Total	UK Average (%)	Variance
Convenience	31	7.8%	9.2%	-1.4%
Comparison	161	40.4%	39.8%	+0.6%
Service	141	35.3%	37.4%	-2.1%
Vacant	62	15.5%	12.4%	+3.1%
Miscellaneous	4	1.0%	1.2%	-0.2%
TOTAL	**399**	**100%**	**100%**	**-**

Source: Experian Goad (March 2015)

8.29 The town centre's comparison goods offer is broadly in line with the national average, with 161 units equating to approximately 40% of all units. This includes representation from within all 15 comparison sub-categories and above average representation across several of these including notably 'florists and gardens', 'sports, toys, cycles and hobbies' and 'men's/boys' wear'.

8.30 In contrast, representation from retailers within the service retail category is below average. Notwithstanding this, the centre is well served by a range of services with representation across all seven sub-categories. There is also above average representation from buildings societies and travel agents.

8.31 Experian Goad survey data indicated that the town centre had an above average vacancy rate with 62 units equating to approximately 15% of all units and 13.2% of floorspace, (compared to a national average of 10.4%). More recently, the vacancy rate has been falling and in January 2016 Loughborough BID reported 8% of units were vacant.

8.32 Overall, Loughborough benefits from a good comparison retail offer which is in line with the national average. There is scope to further enhance its convenience and service offer, particularly in the leisure sector with regards to the latter. As highlighted within the Charnwood Retail and Town Centre Study (2013), the centre cannot afford to be complacent, in light of the strength of the offer in surrounding destinations such as Leicester and Nottingham, and should strive for further improvements where there are opportunities to do so.

8.33 The major national chain stores represented in the town are largely located in Market Place, Carillon Centre and The Rushes. There are many independent shops in the town too with Wards End, Market Street, Devonshire Square, Church Gate, Baxter Gate and Biggin Street being important as secondary shopping streets. Consultees believed that Loughborough has more independents, representing a wider offer and better quality of provision than it is often credited with. This in turn created an attractive and ambience to the centre, which continued to draw in visitors.

8.34 Markets are held every Thursday and Saturday, and it was reported that they generate significant additional footfall and that sales of other retailers/service providers are higher on those days as a result. Consultees reported that the market appeared busy and well-supported by traders and visitors alike (130 traders in February 2011). This helps to create vibrancy around the centre, and consultees believed there is a need for more events to develop this further.

8.35 In addition, footfall figures[17] show that Loughborough had very high levels of footfall at both busy and quiet times compared to the East Midlands and national levels. This is shown in the table below:

Table 8.5: Footfall in Loughborough

	Loughborough	East Midlands	National
Busy	340	171	143
Quiet	204	106	99

Available Retail Expenditure

8.36 Having regard to the results of the household survey of shopping patterns underpinning the Charnwood Retail and Town Centre Study (2013), we have defined the primary catchment area (PCA) for Loughborough as comprising the following Local Authority Wards: Ashby; Garendon; Hastings; Lemyngton; Nanpantan; Outwoods; Shelthorpe; Southfields; and Storer

8.37 Population estimates and forecasts for the PCA have been drawn from the Pitney Bowes GeoInsight database. This provides estimates of population based on projections and the 2011 census for small, localised areas. Overall the population within the PCA is currently 58,733. This is forecast to grow to 60,412 by 2021 and to 62,123 by 2026. This equates to an overall projected growth of 5.8% over the next 10 years.

8.38 Total available expenditure in the survey area in forecast years is a product of both population change and spending growth applying these trend-based projections. The outputs of this analysis in terms of available 'retail' expenditure, is set out within Table 8.7 below.

Table 8.7: Forecast Available Retail Expenditure within Loughborough PCA			
Year	Convenience Goods	Comparison Goods	Total Available Retail Expenditure
2016	£127.6m	£218.0m	£345.7m
2021	£134.6m	£287.6m	£422.2m
2026	£141.9m	£379.3m	£521.2m
% Growth 16'-26'	11.2%	73.9%	50.8%
Source: Turley (2015)			

Current Shopping Patterns

8.39 The results of the household survey (November 2012), which underpins the Charnwood Town Centre and Retail Study (2013), indicates that the town centre retains approximately 28% of convenience goods expenditure (£35.3m) generated within the survey area and approximately 45% of comparison goods expenditure (£97.7m).

8.40 Adopting this as the baseline position, the level of retail expenditure attracted to the town centre is in the order of £133.0m at 2016, equating to a market share within the survey area of 39%. This compares to a combined market share of 40% (£139.1m) currently drawn to other retail facilities located in the PCA including Tesco at Shelthorpe, Morrisons in Maxwell Drive and Regents Place Retail Park and Willowbrook Retail Park.

8.41 Overall, this represents a relatively high level of retention indicating strong localised shopping patterns and relatively low leakage of expenditure to other centres/retail destinations beyond the PCA (around 21%). In addition, the results of the household survey indicate that the Loughborough town centre has a wider than local degree of influence beyond the PCA, particularly within Zones 3, 4, 7 and to a lesser extent 8 of the defined Study Area[18].

//www.hinckleybid.co.uk/" http://www.hinckleybid.co.uk/
[18] Figure 2, Charnwood Retail and Town Centre Study (2013),

Local Perceptions on Potential for Improvement

8.42 Attitudinal questions were asked as part of the household survey, which explored the extent of potential areas for improvement within the town centre.

Table 8.8: Suggested Improvements	
Improvement	Proportion of Respondents
No improvements needed	30%
Bigger choice of clothing and fashion shops	17%
More parking provision	12%
More choice of shops (general)	10%
More department stores and larger stores	9%
More quality / designer stores	6%
Free parking	6%
Cheaper parking	6%
Bigger Marks & Spencer store	5%
More independent shops	4%
Fewer vacant units	4%
Nicer shopping environment	3%
Better links from car parks to town centre	3%
More / improved supermarkets / food retail	2%
Source: Charnwood Household Survey (November 2012)[19]	

8.43 This indicates that almost one third of respondents consider no improvements to the town centre are needed. Areas where improvements were cited, include an improved retail offer (in terms of general retail, fashion retail, independent shops and supermarkets, and the quality of the retail offer), and matters associated with improving car parking provision, the cost of car parking, and linkages between the car parks and the town centre shops.

8.44 Overall, Loughborough is a sizeable centre with a reasonable mix of retail and service uses on offer which is contributing towards retaining relatively high levels of retail expenditure within its core catchment. There is scope to further enhance its overall offer to ensure it remains attractive and competitive in the context of on-going structural changes in the retail market and continuing polarisation towards higher order centres (particularly for comparison goods).

[19] Commissioned by Peter Brett Associates on behalf of the Council to inform the 2013 Retail Study

Summary

8.45 Loughborough has been identified by Charnwood Borough Council as an area for growth, centred on high tech industries linked to Loughborough University. To support this growth the town centre needs to be improved to better cater for the student population and the growing number of more affluent residents who will be attracted to the location.

8.46 Whilst the retail offer is good, local businesses felt that further improvements need to be made to the public realm in order to create a more defined route around the town centre and encourage longer dwell time.

8.47 More generally there is a sense that Loughborough ought to decide what kind of town it wants to be. Whilst strategic stakeholders see it as a small city, businesses regard it as still a market town. In addition, consultees thought it lacked a clear identity: traditional or modern? conventional or quirky? The consensus is that any further public realm or other works ought to adopt a theme, set minimum standards and be consistent.

SWOT Analysis

Strengths	Weaknesses
• Identity linked to the University • Significant student population • Compact Town Centre • High levels of visitor satisfaction • Good mix of independent stores • Successful market • Low vacancy rates	• Potential that 'drinking culture' may inhibit evening economy • Lack of cultural and leisure opportunities • Sense that the centre is dominated by coffee, pound and charity shops • Car parking (cost and capacity) • Poor public transport provision
Opportunities	**Threats**
• Growth in the knowledge economy • Success of the market as an attraction, use it for event space • Create a strong brand/identity • Creation of a retail circuit • Inner relief road, take congestion out of the town centre • Key development sites coming forward • Development of night time economy	• Too much traffic in town centre • Perception of crime quite high • Poor quality public realm • Proximity to Leicester and Fosse Park drawing customers to better shops/leisure opportunities

Potential Projects

8.48 Each of the below are regarded as potentially viable projects, albeit it has not been possible to determine potential costs or the likelihood of securing funding. These projects are aimed at recapturing some existing resident spending, capturing a good proportion of the spending of those who will move into new homes being built in the area and generating higher levels of visitor spending.

8.49 Whilst it is impossible to predict the impact any of these projects might have, a measure of the potential return on investment is that if by 2021 the percentage of retail expenditure currently drawn to other centres/retail destinations could be reduced by one tenth (from 21.0% to 18.9%), this would generate an **additional £9 million** of retail expenditure each year.

Digital Projects

- Further development of the Love Loughborough town centre website, linked to websites for other Leicestershire market towns
- the provision of free wi-fi within the town centre (noting that Phase 1 is scheduled to be installed in Summer 2016)
- Co-ordinating all existing sites into one to create a single platform, such as an electronic network which can be used to inform residents, businesses and key stakeholders of projects and plans in the town. This could be used as a key mechanism to coordinate community activity and keep the sense of community engagement and pride.
- Build on the social media campaign carried out by the BID to local people as well as potential visitors

Quality Enhancement Projects

- Improvements to the main gateways into the Town Centre
- Clearer signage from car parks to the centre
- Improvements to and better linkages between the town's historic public spaces to provide a safer shopping environment and easier access and movement for all.
- Public realm improvements to Wards End/Bedford Square/Devonshire Square.

Regeneration Projects

- Loughborough's 'Ugly Sisters'. The key project relates to the three 1960s developments the appearances of which are blighting the town centre: Devonshire Square & Granby Street Car Park (Charnwood Borough Council is currently commissioning updated plans and costings for this project from the County Council); Former General Hospital & Aumberry Gap (part of which is now moving forward as a multi-screen cinema and family restaurants); and Jocklar House on Swan Street. One or more of these sites may have potential to be designated a Town Centre Investment Zone.
- Generator Project. The adaptation of the former Loughborough College of Art and Design premises to deliver a creative industries hub with the capacity to accommodate about 60 people supported by a central hub and shared café space for wider membership use as a networking facility, touch down space and events venue. Estimated capital cost £2.5 million.

Promotional Projects

- A calendar of events distributed amongst businesses and residents to promote higher levels of awareness of activities in the town centre.
- Find and utilise a figurehead who could be the face of Loughborough and attract new investment and additional footfall

9 LUTTERWORTH

Overview

9.1 Lutterworth is located in Harborough District and is the second largest settlement in the District, after Market Harborough which is the principal town. It is located just off the M1 at junction 20 and the nearest train station is 6 miles away in Rugby. Lutterworth is identified as a Key Centre, which means that it is considered a sustainable location to provide additional housing, employment, retail and community facilities with the District and to serve the surrounding area.

9.2 There are proposals to develop around 2,000 new homes on a site between Lutterworth and Market Harborough (just off Junction 20 of the M1). Five new housing estates are proposed and this will represent a major opportunity for the town centre to benefit from this additional spending power.

9.3 Most of the engineering businesses on which Lutterworth built its modern reputation have now gone. Nearby Magna Park is the source of a substantial number of jobs in warehousing and distribution. There are currently two planning applications in process for major expansions at Magna Park. Despite the large number of people employed at Magna Park, evidence suggests that because of the distance few actually use Lutterworth Town Centre as this involves a car journey.

9.4 A recent planning application has been made for the area of land immediately adjacent to J20 on the M1 which would be a significant new development. .

9.5 A new car parking strategy for the District is in being produced and will include Lutterworth.

Town Centre Population

9.6 The table below presents population data for Lutterworth town centre. The way the town centre boundary has been drawn means only a small number of people live within the town centre boundary. The economic activity rate in Lutterworth town centre (65.3%) is just above the LLEP average (63.1%). Employment is also higher, but so is unemployment, with the proportions of self-employed and students much lower (this is only 13 people, however). The other notable figure is the relatively high percentage of long term sick/disabled people (nearly three times the LLEP average), but again only 16 people.

Table 9.1: Lutterworth Town Centre – Population				
	Town Centre		LEP	GB
	No.	%	%	%
All usual residents 16-74	167	100.0%	100.0	100.0
Economically active	109	65.3%	63.1%	63.3%
Employed	89	53.3%	48.0%	47.4%
Self employed	9	5.4%	7.8%	8.9%
Unemployed	7	4.2%	2.7%	2.4%
Full Time Student	4	2.4%	4.6%	4.7%
Economically Inactive	58	34.7%	36.9%	36.7%
Retired	27	16.2%	20.5%	21.4%
Student	2	1.2%	7.2%	5.3%
Looking after home / family	7	4.2%	3.9%	3.9%
LT Sick / Disabled	16	9.6%	3.3%	3.9%
Other	6	3.6%	2.1%	2.2%
Source: Census Data, 2011				

Indices of Deprivation

9.7 It is clear that Lutterworth town centre is not especially deprived in respect of any of the Indices.

Table 9.2: Lutterworth Indices of Deprivation		
Deprivation Domain	National Decile (1 most deprived)	Leicestershire Rank (1 most deprived)
Overall	8	190
Income	6	98
Employment	7	195
Education, Skills and Training	7	237
Health and Disability	8	194
Crime	5	116
Barriers to Housing and Services	10	359
Living Environment	6	126
Source: English Indices of Deprivation		

Town Centre Workday Population

9.8 Table 9.3 illustrates the occupations of the workday population in Lutterworth. The town centres 'Lower managerial' workday population (26.1%) is double the LLEP average. The proportion of people who have never worked or are long-term unemployed is well below the LLEP average. Lutterworth is a commuter town with many people out-commuting to work and what we do not have evidence of is the number of residents of Lutterworth who work at Magna Park.

Table 9.3: Town Centre Work Day Population – Lutterworth

Occupation	Lutterworth	LLEP	England and Wales
Higher managerial, administrative and professional occupations	8.4%	9.0%	10.2%
Lower managerial, administrative and professional occupations	26.1%	11.2%	20.8%
Intermediate occupations	14.2%	12.4%	12,8%
Small employers and own account workers	7.4%	8.5%	9.4%
Lower supervisory and technical occupations	6.6%	7.1%	6.9%
Semi-routine occupations	12.9%	14.2%	14.1%
Routine occupations	15.3%	13.6%	11.1%
Never worked and long-term unemployed	1.8%	5.5%	5.6%
Total Number	380	724,309	41.0m

Source: Annual Population Survey (2015)

Economic Value of the Town Centre

9.9 Lutterworth's town centre has a GVA of £53.5m, which amounts to 5.0% of the total for all of the market towns included in this study. There are more than 1,200 people employed in the town centre. Average GVA per worker is £42,155 which equates to the County-wide average.

Table 9.4: Value of Town Centre Economic Activity in Lutterworth

	Workers	GVA £m	Proportion
Lutterworth	1,268	53.5	4.8%
Total	**25,197**	**1,061**	**100.0%**

Source: ONS figures and ERS analysis

Strategic Context

9.10 As the second largest settlement, Lutterworth features significantly in the **Harborough District Growth Plan (2014)**. The Growth Plan was prepared in order to support the LLEP LEP Strategic Economic Plan (2014-2020).

9.11 The Open for Business Prospectus dated 2013 serves to strengthen Harborough as a business location. Providing alternatives to out-commuting, attracting inward investment, incentivising business relocation, inception and growth as well as promoting the town's unique selling points are the main aims of the Prospectus.

9.12 To deliver these aims, six intervention strategies have been recommended to Harborough District Council to work towards over the short to medium term, including:

- Enhance the benefits of doing business in the district by improving the visitor economy, improving the town centres and encouraging business, leisure, rural and heritage tourism

9.13 Harborough District Council is currently developing a **New Local Plan** to cover the entire District and its anticipated adoption is March 2017. The New Local Plan will update and supersede the Harborough Core Strategy (2006-2028) adopted in 2011. In particular, the plan presents how much housing and employment development is required in Lutterworth and other centres in the district up until 2031[20].

9.14 The New Local Plan Draft Vision is to see Harborough in 2031 as:

> *"…a vibrant, safe and prosperous District which retains its distinct identity as a predominantly rural area of villages and market towns and where local communities enjoy a high quality of life. Residents will benefit from increased access to suitable housing, a wider range of local better skilled jobs, and good quality services and facilities which promote healthy and safe lifestyles*."

9.15 A total of 14 objectives have been prepared for discussion towards achieving this vision and one in particular pertains to the strategic role of Town and Village Centres. Indeed, Draft Objective 8 aims to:

> *"Support and enhance the vitality and viability of town and village centres, as places for shopping, leisure, cultural, commercial and community activities, recognising their valued role as the heart of their communities and encourage retail, leisure and commercial development in appropriate locations."*

[20] The version of the New Local Plan presented here reflects that made available following publication of the Option Consultation Paper (Sept 2015).

9.16 Lutterworth Vision and Masterplan (2006) set out a series of strategic objectives under four headings:

Economy

- Bring new investment into the town centre, particularly more and better shops.
- Support existing businesses and encourage new businesses, strengthening the traditional heart of the town centre.
- Help create a stronger brand identity and unique selling points.
- Attract people from Lutterworth to visit the town more often.
- Help secure regeneration funding for town centre improvement projects.

Environment

- Make the town centre environment a place for people, not dominated by cars and parking.
- Improve the traditional character of the town centre, focusing on High Street, Market Street, Church Street and Market Place.
- Make the best of the town's heritage buildings and built environment.
- Bring more 'green' into the town centre, such as floral displays and at gateways.
- Improve the streetscape and open spaces in the town centre.

Activities and Uses

- Develop high quality specialist and independent shops and services in the traditional town centre.
- Promote ground floor uses in the town centre to be mainly shops, cafes/ restaurants. 8. Strengthen and improve the quality and management of the market.
- Promote high quality and more diverse evening uses which can have a broad appeal and attract people to the town at night.
- Make new space for community uses in the heart of the town centre to provide a focal point for public uses.

Transport and Access

- Reduce traffic impact in the heart of the town centre, especially from HGVs.
- Improve the quality of signage in the town centre to make it easier to find the way around.
- Improve walking and cycling links to and within the town centre.
- Make the town accessible throughout for people with disabilities.
- Improve the quality of car parks and links to the car parks.
- Improve connectivity between key attractions in the town centre

Retail Offer

Retail Composition

9.17 There is a very limited retail offer and few high quality retailers or eateries. There is a traditional weekly market (on a Thursday), although this has declined to only five or six stallholders on a regular basis. There is also a Farmer's Market on a Saturday which attracts 4-5 stallholders each week. In addition, there are 2-3 speciality markets that visit the town each year.

9.18 Drawing on the data contained within the Market Harborough Retail Study (2013), which was based on the November 2012 Experian Goad survey, the town centre comprises approximately 89 retail units.

9.19 The centre's convenience goods offer comprises a total of 8 units which is broadly in line with the national average. Closer analysis reveals a good range of convenience goods on offer, including representation from bakers, butchers, greengrocers and grocery stores and general convenience stores. This includes representation from Morrisons and Waitrose (the Co-op store having closed and been replaced by a Factory Outlet shop).

Table 9.5: Lutterworth Town Centre Retail Composition

Retail Category	No. Units	% of Total	UK Average (%)	Variance
Convenience	8	9.0%	9.3%	-0.3%
Comparison	39	43.8%	40.3%	+3.5%
Service	35	39.3%	37.9%	+1.5%
Vacant	7	7.9%	12.6%	-4.7%
TOTAL	**89**	**100%**	**100%**	**-**

Source: Table B.1, Market Harborough Retail Study (2013) / 2015 UK Average (Experian Goad)[21]

9.20 The centre's comparison retail offer exceeds the national average by 3.5% although this predominantly comprises independent retailers located along the High Street and Church Street.

9.21 Service uses also marginally exceed the national average (+1.5%). Although the proportion of 'restaurants/cafes/takeaways' and 'hairdressers/beauty parlours' is below the national average, whilst the proportion of banks and financial services, estate agents and travel agents exceeds the national average.

9.22 The vacancy rate is well below the national average (-4.7%) with just seven units identified as vacant. This is a strong indicator of good health and resilience in the face of changing retail trends and consumer shopping patterns.

9.23 Overall, the retail composition of Lutterworth in 2013 indicates a reasonable mix and choice of uses, which enable people's day to day shopping needs to be met. The centre has above average representation from comparison retailers, comprising predominantly independent operators. Whilst there is limited representation from multiples, this is not unusual for a centre of this scale and

[21] Re-weighted to remove 'miscellaneous'

position in the retail hierarchy. The centre benefited from a low vacancy rate in 2013, which if remains today would be regarded as a particularly strong indicator of good health.

Available Retail Expenditure

9.24 Having regard to the results of the household survey of shopping patterns underpinning the **Harborough Retail Study (2013),** we have defined the primary catchment area (PCA) for Lutterworth as comprising Zone 1[22] of the defined Study Area.

9.25 Population estimates and forecasts for the PCA have been drawn from the Pitney Bowes GeoInsight database. This provides estimates of population based on projections and the 2011 census for small, localised areas. Overall the population within the PCA is currently 9,535. This is forecast to grow to 9,711 by 2021 and to 9,922 by 2026. This equates to an overall projected growth of 4.1% over the next 10 years.

9.26 Total available expenditure in the survey area in forecast years is a product of both population change and spending growth applying these trend-based projections. The outputs of this analysis in terms of available 'retail' expenditure, is set out within Table 9.6 below.

Table 9.6: Forecast Available Retail Expenditure within Lutterworth PCA

Year	Convenience Goods	Comparison Goods	Total Available Retail Expenditure
2016	£20.0m	£32.6m	£52.6m
2021	£20.9m	£42.6m	£63.5m
2026	£21.9m	£55.8m	£77.7m
% Growth '16-'26	9.4%	71.1%	47.6%

Source: Turley (2015)

[22] Equivalent to the following wards: Lutterworth Brookfield; Lutterworth Orchard; Lutterworth Springs; and Lutterworth Swift.

Current Shopping Patterns

9.27 The results of the household survey (September 2013), which underpins the Market Harborough Retail Study (2013), indicates relatively high levels of retention for convenience goods expenditure with an estimated retention of 79% (£15.9m) within the PCA. In contrast, the centre achieves a comparison goods market share of 17%, which equates to £5.6m of locally generated comparison goods expenditure.

9.28 Adopting this as the baseline position, the level of retail expenditure attracted to the town centre is in the order of £24.5m at 2016, equating to an overall market share within the PCA of 41%.

9.29 Overall therefore, 59% of retail expenditure generated within the PCA is currently drawn to other centres/retail destinations beyond Lutterworth town centre. This 'leakage' is largely attributed to comparison goods which is not unusual given the proximity of competing centres such as Leicester and the newly opened Elliots Fields in Rugby.

Summary

9.30 Overall, Lutterworth provides a reasonable mix and choice of uses, which enable people's day to day shopping needs to be met. The town centre has a good choice of convenience goods on offer which is reflected in its convenience goods market share (79%). Whilst the centre has above average representation from comparison retailers, this predominantly comprises independent operators with limited representation from multiples. Reflecting this, the centre's comparison goods market share is much lower (17%) and there are high levels of leakage to other competing centres including Leicester and Rugby (including the newly opened Elliots Fields), as well as out-of-centre provision such as Fosse Park.

9.31 In the context of on-going structural changes in the retail market and continuing polarisation towards higher order centres (particularly for comparison goods), it will be challenging for the centre to attract certain multiple operators and this should not be relied upon as a means to boost the vitality and viability of the district centre.

SWOT Analysis

Strengths	Weaknesses
• Historic character • Community spirit • Ability to attract Waitrose and Costa	• Limited good quality retail and hospitality offer • Under-developed evening economy • Congestion and disruption from HGVs • Declining market • Limited attractions for younger people
Opportunities	**Threats**
• Redevelopment of former County Council site • Establishment of a town museum • New housing	• Erosion of strengths • Weaknesses continuing on a downward trajectory

Potential Projects

9.32 Each of the below are regarded as potentially viable projects, albeit it has not been possible to determine potential costs or the likelihood of securing funding. These projects are aimed at recapturing some existing resident spending, capturing a good proportion of the spending of those who will move into new homes being built in the area and generating higher levels of visitor spending.

9.33 Whilst it is impossible to predict the impact any of these projects might have, a measure of the potential return on investment is that if by 2021 the percentage of retail expenditure currently drawn to other centres/retail destinations could be reduced by one tenth (from 59.0% to 53.1%), this would generate an **additional £1.7 million** of retail expenditure each year.

Digital Projects

This would comprise:

- a town centre website, involving the retailers and linking in with Lutterworth Town Council's site which could then be connected to websites for other Leicestershire market towns
- the provision of free wi-fi within the town centre
- a promotional campaign utilising social media (to local people as well as potential visitors)

Regeneration Projects

This would comprise:

- Working with a County-wide key sites officer to facilitate development of the County Council-owned site
- Becoming part of a County-wide market towns town centre Enterprise Zone
- Potential pedestrianisation of Church Street as per masterplan
- Work with partners including the Town and District Council to revitalise the market10.

Market Harborough Overview

10.1 Market Harborough is the main settlement in Harborough District. The town is located in the south of the District, close to border with Northamptonshire. It is 15 miles away from Leicester and 17 miles from Northampton. Market Harborough has been designated a Key Centre for sustainable expansion and development.

10.2 Market Harborough is well connected by transport networks and public services. The town is the only settlement in the District to have a railway station, providing frequent connections to Leicester and direct trains to London in just under an hour, making commuting to the capital feasible and a frequently undertaken option. Of those employed in Market Harborough 18% walk to work and 62% drive to work, evidencing the coexistence of a vibrant local business scene and a significant commuting community.

10.3 A car parking strategy for the District is in production and Market Harborough is an area of focus.

10.4 The town represents a key employment area, supporting many SMEs, larger businesses and self-employed individuals. The outlook is one of a successful entrepreneurial economy which has significant growth potential.

10.5 Over the past five years, Harborough District Council (HDC) has undertaken a number of capital investments in the town centre, namely: Harborough Innovation Centre (£4m), The Symington Building (£7m) and Harborough Market (£650,000).

10.6 In respect of revenue funding, HDC has contributed to the planning of events in the town centre both directly and through enabling groups to deliver events. In addition, there is a community grant fund from which many organisations have benefitted. HDC employs a dedicated Town Centre Co-ordinator on a part-time basis.

10.7 In 2012, Market Harborough was one of 12 successful community schemes across England (and the only town in Leicestershire), awarded funding under the Big Lottery Fund's Communities Living Sustainably programme. Sustainable Harborough aims to inspire people to adapt the way they live and work and connect together to reap financial, environmental and health benefits. The project focused on what local people wanted and created projects that can bring about a more vibrant, inclusive community with lower carbon emissions. The project successfully deployed: retro-fitting of water saving devices, a demonstration EcoHouse to monitor energy at street level and recruitment of energy champions to generate community engagement.

10.8 Market Harborough does not have a Town Council and proposals for a BID were rejected in 2011. There was a Harborough Improvement Team, however this has now ceased, although sub-groups such as the environment group still continue in their own right and there is a part time officer position at the council that focussing on developing Town centre events

Town Centre Population

10.9 Within Market Harborough's town centre 80.2% of the population are economically active which is higher than the LEP and GB average and also higher than most of the other Leicestershire Market Towns in the study. Unemployment within the town centre is slightly below the LEP average and very close to the GB average. The percentage of retirees within the town centre is relatively high compared to the other Leicestershire Market Towns but still far below both the LEP and GB averages. This is because many people live in other areas of the town rather than the centre itself.

Table 10.1: Market Harborough Town Centre – Population

	Town Centre		LEP	GB
	No.	%	%	%
All usual residents 16-64	278	100.0%	100.0	100.0
Economically active	223	80.2%	63.1%	63.3%
Employed	180	64.7%	48.0%	47.4%
Self employed	32	11.5%	7.8%	8.9%
Unemployed	7	2.5%	2.7%	2.4%
Full Time Student	4	1.4%	4.6%	4.7%
Economically Inactive	55	19.8%	36.9%	36.7%
Retired	38	13.7%	20.5%	21.4%
Student	8	2.9%	7.2%	5.3%
Looking after home / family	3	1.1%	3.9%	3.9%
LT Sick / Disabled	2	0.7%	3.3%	3.9%
Other	4	1.4%	2.1%	2.2%

Source: Census, 2011

Indices of Multiple Deprivation

10.10 The three town centre areas of Market Harborough are not ranked particularly highly within the national and Leicestershire Rank indicating low levels of deprivation.

Table 10.2: Market Harborough Indices of Deprivation

Deprivation Domain	National Decile (1 most deprived)	Leicestershire Rank (1 most deprived)
Overall	8, 9, 6	214, 304, 83
Income	7, 9, 6	156, 331, 103
Employment	7, 9, 7	168, 318, 152
Education, Skills and Training	6, 8, 4	190, 279, 97
Health and Disability	7, 9, 4	167, 269, 35
Crime	7, 4, 4	245, 76, 84
Barriers to Housing and Services	8, 10, 10	256, 345, 369
Living Environment	7, 7, 3	176, 147,

Source: English Indices of Deprivation

Town Centre Workday Populations

10.11 Table 10.3 illustrates the occupations of the workday population in Market Harborough. The occupations that stand out are 'semi-routine occupations' (31.6%) which is much higher in Market Harborough than the LLEP and England and Wales averages, and 'Higher managerial, administrative and professional occupations' which is lower than both the LLEP and England and Wales averages. This is a reflection that people employed in those higher managerial positions are living in higher priced accommodation than that found in the town centre.

Table 10.3: Town Centre Work Day Population			
Occupation	Market Harborough	LLEP	England and Wales
Higher managerial, administrative and professional occupations	4.2%	9.0%	10.2%
Lower managerial, administrative and professional occupations	19.6%	11.2%	20.8%
Intermediate occupations	8.8%	12.4%	12,8%
Small employers and own account workers	6.9%	8.5%	9.4%
Lower supervisory and technical occupations	7.1%	7.1%	6.9%
Semi-routine occupations	31.6%	14.2%	14.1%
Routine occupations	6.6%	13.6%	11.1%
Never worked and long-term unemployed	0.8%	5.5%	5.6%
Total Number	884	724,309	41.0m
Source: APS, 2015			

Town Centre Economic Value

10.12 Market Harborough's town centre has a GVA of £138.7m, which amounts to 13.1% of the total for all of the market towns included in this study. There are more than 3,200 people employed in the town centre. Average GVA per worker is £42,805 which is marginally above the County-wide average.

Table 10.4: Value of Town Centre Economic Activity in Market Harborough			
	Workers	GVA £m	Proportion
Market Harborough	3,240	138.7	13.1%
Total	**25,197**	**1,061**	**100.0%**
Source: ONS figures and ERS analysis			

Strategic Context

10.13 As the largest settlement, Market Harborough features significantly in the **Harborough District Growth Plan (2014)**. The Growth Plan was prepared in order to support the LLEP LEP Strategic Economic Plan (2014-2020).

10.14 The Harborough Growth Plan developed 22 projects focused on the programme themes of Place, People and Business. Project 6 and 7 in the Harborough Growth Plan will directly impact upon the strategic development of Market Harborough and its town centre, as demonstrated by Table 10.5:

Table 10.5: Harborough Growth Plan Projects, Market Harborough

Project	Project Description	Purpose
6	Market Harborough Strategic Development and Town Centre Management	To manage traffic movement within and around Market Harborough Town Centre and develop sustainable transport initiatives to complement the growth of the town. To secure a long term approach to town centre management and development.
7	Midland Mainline Electrification Project and Market Harborough Station Gateway	To deliver enhanced station facilities and commercial development opportunities following the upgrade of the Midland Mainline and track realignment around the station, which started in 2014 utilising LLEP funding.

10.15 The **Open for Business Prospectus (2013)** serves to strengthen Harborough as a business location. Providing alternatives to out-commuting, attracting inward investment, incentivising business relocation, inception and growth as well as promoting the town's unique selling points are the main aims of the Prospectus.

10.16 To deliver these aims, six intervention strategies have been recommended to Harborough District Council to work towards over the short to medium term, including:

- Enhance the benefits of doing business in the district by improving the visitor economy, improving the town centre and encouraging business, leisure, rural and heritage tourism

10.17 Harborough District Council is currently developing a **New Local Plan** to cover the entire District and its anticipated adoption is March 2017. The New Local Plan will update and supersede the Harborough Core Strategy (2006-2028) adopted in 2011. In particular, the plan presents how much housing and employment development is required in Market Harborough, Lutterworth and other centres in the district, up until 2031[23].

10.18 The New Local Plan Draft Vision is to see Harborough in 2031 as:

> *"…a vibrant, safe and prosperous District which retains its distinct identity as a predominantly rural area of villages and market towns and where local communities enjoy a high quality of life. Residents will benefit from increased access to suitable housing, a wider range of local better skilled jobs, and good quality services and facilities which promote healthy and safe lifestyles*."

10.19 A total of 14 objectives have been prepared for discussion towards achieving this vision and one in particular pertains to the strategic role of Town and Village Centres. Indeed, Draft Objective 8 aims to:

> *"Support and enhance the vitality and viability of town and village centres, as places for shopping, leisure, cultural, commercial and community activities, recognising their valued role as the heart of their communities and encourage retail, leisure and commercial development in appropriate locations."*

10.20 The district level housing requirement is for 475 new dwellings to be built each year from 2011 to 2031 or a total of 9,500 dwellings over the plan period in the district. As of 31st March 2015 current construction and outstanding planning approvals will create 2658 dwellings in Market Harborough. Option 2 and 3, which focus on high housing growth in and adjacent to Market Harborough and other urban areas in the District, generate the largest figures in this range. Options 6, 8 and 9 which identify Lutterworth as an SDA, generate the lowest levels of required housing development in Market Harborough.

Progress against strategic objectives

10.21 Market Harborough is well on its way to achieving the visions and aspirations articulated in various plans, with several significant capital developments having been undertaken.

[23] The version of the New Local Plan presented here reflects that made available following publication of the Option Consultation Paper (Sept 2015).

Retail Offer

Retail Composition

10.22 Drawing on the most recent survey undertaken by Experian Goad (October 2014), the town centre comprises approximately 280 retail units.

10.23 The centre's convenience goods offer comprises a total of 24 units which is broadly in line with the national average. Closer analysis reveals a good range of convenience goods on offer, including representation from bakers, butchers, greengrocers and grocery stores and general convenience stores. This includes representation from several multiple convenience operators including Sainsbury's, Waitrose, Co-op, Tesco Metro, Aldi and Lidl.

Table 10.6: Market Harborough Town Centre Retail Composition

Retail Category	No. Units	% of Total	UK Average (%)	Variance
Convenience	24	8.6%	9.2%	-0.6%
Comparison	146	52.1%	39.8%	+12.3%
Service	99	35.4%	37.4%	-2.0%
Vacant	9	3.2%	12.4%	-9.2%
Miscellaneous	2	0.1%	1.2%	-0.5%
TOTAL	**280**	**100%**	**100%**	**-**

Source: Experian Goad (October 2014) / 2015 UK Average (Experian Goad)

10.24 The centre has a strong comparison retail offer which is well above the national average. Comprising a total of 146 units, this equates to over half of all units. Closer analysis shows a good range of comparison stores with representation across all sub-categories and notable representation from stores within the higher end clothing and footwear categories.

10.25 The comparison offer includes a mix of national multiple retailers and small independent traders. Most national multiples are located along the High Street. The majority of the small independent traders are located along Church Street, Adam and Eve Street and Coventry Road.

10.26 The centre has below average representation from retailers within the services category. However, this is balanced by the strong comparison offer and is by no means a negative indicator. Closer analysis identifies representation across all sub-categories within the service sector with a notable number of units within the 'restaurant, cafés, fast food' (39 units) and 'hairdressing, beauty and health' (26 units) sub-categories, although the former is well below average and could be enhanced.

10.27 The vacancy rate is well below the national average (-9.2%) with just nine units identified as vacant. This is a strong indicator of good health in current times and shows resilience in the face of changing retail trends and consumer shopping patterns.

10.28 The Harborough Retail Study (2013) identifies constraints in terms of the town centre's historic street layout and surrounding residential areas, which limits the potential to accommodate new development. However, at that time there was also considered potential to explore the redevelopment potential of the certain sites including the Commons car park site, Springfield Retail Park car park (east side) and the land between School Lane and the High Street.

10.29 Overall, the retail composition of Market Harborough indicates that the centre provides a good diversity of uses, which enable people's day to day shopping needs to be met. The centre has above average representation from comparison retailers, which is underpinned by a strong independent sector. The centre performs well in terms of its convenience offer, with several key multiples represented in this respect. In addition, the vacancy rate is well below the national average which, in the current market, is regarded as a particularly strong indicator of good health.

Available Retail Expenditure

10.30 Having regard to the results of the household survey of shopping patterns underpinning the Harborough Retail Study (2013), we have defined the primary catchment area (PCA) for Market Harborough as comprising Zone 5[24] of the defined Study Area.

10.31 Population estimates and forecasts for the PCA have been drawn from the Pitney Bowes GeoInsight database. This provides estimates of population based on projections and the 2011 census for small, localised areas. Overall the population within the PCA is currently 24,733. This is forecast to grow to 26,093 by 2021 and to 27,273 by 2026. This equates to an overall projected growth of 10.3% over the next 10 years.

10.32 Total available expenditure in the survey area in forecast years is a product of both population change and spending growth applying these trend-based projections. The outputs of this analysis in terms of available 'retail' expenditure, is set out within Table 10.7 below:

Table 10.7: Forecast Available Retail Expenditure within Market Harborough PCA

Year	Convenience Goods	Comparison Goods	Total Available Retail Expenditure
2016	£50.4m	£83.1m	£133.5m
2021	£54.5m	£112.4m	£166.9m
2026	£58.4m	£150.7m	£209.0m
% Growth 16'-26'	15.9%	81.3%	56.6%

Source: Turley (2015)

[24] Equivalent to the following wards: Market Harborough – Great Bowden and Arden, Little Bowden, Logan and Welland.

Current Shopping Patterns

10.33 The results of the household survey (September 2013), which underpins the **Market Harborough Retail Study (2013)**, indicates very high levels of retention for convenience goods attracting approximately 90% (£45.5m) of such expenditure generated within the PCA. This reflects the strength and choice of convenience goods provision within the town centre and limited out-of-centre competition.

10.34 For comparison goods, the town centre performs well with a 41% market share within the PCA, which equates to £34.4m of locally generated comparison goods expenditure. This represents a leakage of approximately 59% which is largely drawn to nearby centres including Leicester, Wigston and Corby, and out-of-centre provision such as Fosse Park.

10.35 Adopting this as the baseline position, the level of retail expenditure attracted to the town centre is in the order of £79.9m at 2016, equating to a relatively strong market share within the PCA of 60%.

10.36 Overall therefore, 40% of retail expenditure generated within the PCA is currently drawn to other centres/retail destinations beyond Market Harborough town centre. As highlighted above, this 'leakage' is largely attributed to comparison goods which is not unusual given the proximity of higher order centres such as Leicester. This is also balanced out by the strength of the centre's convenience offer and strong levels of retention in this respect.

10.37 Overall, Market Harborough provides a good diversity of retail and service uses, which enable people's day to day shopping needs to be met. The centre has above average representation from comparison retailers, which is underpinned by a strong independent sector. Reflecting this, the centre benefits from a relatively strong comparison goods market share within the PCA of 60%. The centre has an even more prominent convenience role which attracts a significant 90% of expenditure generated within the immediate catchment. This is a strong position and is reflective of the limited out-of-centre competition in the area which should continue to be resisted.

Summary

10.38 Market Harborough is an attractive market town and a pleasant location for shopping, eating and entertainment. However, it is important that the expansion and its success do not begin to impact adversely on its town centre. Traffic congestion has been highlighted as a particular concern and encouraging more sustainable travel should become a priority to make sure that people continue to enjoy visiting. There are also concerns that despite having a relatively rich cultural and retail offer, Market Harborough does not appeal to young people and more could be done to entice a younger demographic.

10.39 Market Harborough provides a good diversity of retail and service uses, which enable people's day to day shopping needs to be met. The centre has above average representation from comparison retailers, which is underpinned by a strong independent sector. Reflecting this, the centre benefits from a relatively strong comparison goods market share within the PCA of 60%. The centre has an even more prominent convenience role which attracts a significant 90% of expenditure generated within the immediate catchment. This is a strong position and is reflective of the limited out-of-centre competition in the area which should continue to be resisted.

10.40 Market Harborough is performing well, with strong levels of economic activity and low deprivation levels. However, it should be noted that there is a strong presence of semi-routine occupations, filled by workers from outside the region that may be affected by other district level factors. This all supports the perception of Market Harborough as a successful residential, service, leisure and shopping hub with the potential to develop a stronger cultural and leisure offer for both local residents and those within its wider catchment.

SWOT Analysis

Strengths	Weaknesses
• Considered an attractive town • Variety and high quality retail offer • Refurbished market hall • Vibrant night time economy • Sufficient choice of restaurants and cafés • Active community and voluntary sector • Festivals/events – e.g. Arts Fresco attract people into the town centre. • Parks – an asset for the visitor economy • Proximity to London – attracting people with disposable incomes • Low levels of deprivation • Very few vacancies.	• Less aimed at younger demographic • Lack of a vision for Market Harborough • Lack of self-promotion. • Digital and on-line is a challenge. • Traffic congestion • Lack of higher skilled jobs within the town centre area • Lack of coordination and collaboration in terms of voluntary and community organisations and/or businesses. • No link to Foxton Locks (and attendant tourism benefits)
Opportunities	**Threats**
• The establishment of a cultural quarter. • Promotional activities. • Better signage – particularly to support the cultural offer. • A better understanding of external perceptions of Market Harborough and catchment for the town centre. • BID or better collaboration between businesses. • Greater support and collaboration between community and voluntary sector groups playing a role in improving the town centre. • New housing	• Pressure on roads and infrastructure from any future increases in traffic, and the new housing development. • The risk of flooding from the Welland is a concern for town centre businesses. • Any loss of the variety and quality of independent shops – which is what makes Market Harborough unique. • Any loss of green infrastructure or green space within the town.

Potential Projects

10.41 Each of the below are regarded as potentially viable projects, albeit it has not been possible to determine potential costs or the likelihood of securing funding. These projects are aimed at recapturing some existing resident spending, capturing a good proportion of the spending of those who will move into new homes being built in the area and generating higher levels of visitor spending

10.42 Whilst it is impossible to predict the impact any of these projects might have, a measure of the potential return on investment is that if by 2021 the percentage of retail expenditure currently drawn to other centres/retail destinations could be reduced by one tenth (from 40.0% to 36.0%), this would generate an **additional £6.7 million** of retail expenditure each year.

Digital Projects

- the development of a town centre website, linked to websites for other Leicestershire market town
- the provision of free wi-fi within the town centre
- delivery of a promotional campaign utilising social media (to local people as well as potential visitors)

Quality Enhancement Projects

- Utilising results of traffic study that is currently being undertaken, projects may arise that will address issues of traffic congestion and to address future needs as a result of the expected housing growth. Making space and encouraging more sustainable transport in and out of the town (e.g. improved cycle lanes) and anticipating the increased traffic is likely to be a key priority.

Promotional Projects

- Promotion of Market Harborough could be increased. In order to attract a range of visitors i.e. younger population and day visitors from London, the town centre could be doing more to market itself as a destination town. This supports the idea that better coordination is required to reach its full potential and increase its tourism offer.
- Greater understanding of the catchment for Market Harborough – research into who and why people visit Market Harborough and how it might be best promoted to potential visitors. This might link to possible pursuit of Purple Flag accreditation.

11. MELTON MOWBRAY

Overview

11.1 Melton Mowbray has traditionally been the main economic centre within Melton Borough as the home of larger (manufacturing) employers and the main retail and service destination for local people and visitors. The Borough has strengths in respect of a number of the LEP's key sectors, namely food and drink, tourism and distribution/logistics. Melton promotes itself as the 'Rural Capital of Food', based largely on its eponymous Pork Pies but also its wider quality food retail offer. There are a number of food and drink producers within the Borough (perhaps most notably Samworth Brothers on the outskirts of Melton Mowbray, producers of chilled and ambient foods and a major employer). Study consultees thought there was potential to cultivate the food production sector and to link this more closely to the retail offer in the town centre.

11.2 The commercial offering of the town centre is similar to other large market towns. Roughly half (48%) are within the A1 (shops, showrooms) category, 9% are within the A3 category, reflective of the town's increasing restaurant and café culture. A higher percentage of B2 businesses ('general industry') are represented in the town at 10% compared to the national figure of 1%, which is reflective of the Snow Hill Industrial Estate's inclusion in the town centre boundary. On the edge of the town centre is Pera Business Park, offering office and industrial accommodation to SMEs as well as conference facilities.

11.3 Melton Mowbray was one of four towns nationally to take part in the DCLG's Town Centre Investment Management Pilot in 2015, commissioned by Peter Brett Associates. Using the TCIM model and process, the pilot sought to identify means of overcoming the barrier of fragmented ownership within the town centre, thus creating a basis for growth and attracting investment into a specific town centre area. The findings of the TCIM pilot will be included as a model within the report.

11.4 In addition, a Business Improvement District (BID) is in place, The Melton BID was established in June 2011 and seeks to enhance the vitality of the town centre, raising its profile as a tourist and shopping destination and to reduce business costs through business schemes. The BID has: promoted the town as the 'Rural Capital of Food', continued the town's Revive and Thrive Challenge, the 'Think Melton, Taste Melton' and 'Think Melton, Shop Melton' campaigns; and seeks to brand the town's evening economy. The BID faces a re-ballot in September 2016.

Town Centre Population

11.5 Melton town centre has a very small population of 145 residents, over 117 (80.7%) are economically active. Economic activity rates are high for the size of its population with 5.5% being unemployed compared to 2.7% at the LLEP level.

Table 11.1: Melton Town Centre – Population				
	Town Centre		LEP	GB
	No.	%	%	%
All usual residents 16-64	145	100.0%	100.0	100.0
Economically active	117	80.7%	63.1%	63.3%
Employed	91	62.8%	48.0%	47.4%
Self employed	15	10.3%	7.8%	8.9%
Unemployed	8	5.5%	2.7%	2.4%
Full Time Student	3	2.1%	4.6%	4.7%
Economically Inactive	28	19.3%	36.9%	36.7%
Retired	17	11.7%	20.5%	21.4%
Student	6	4.1%	7.2%	5.3%
Looking after home / family	3	2.1%	3.9%	3.9%
LT Sick / Disabled	2	1.4%	3.3%	3.9%
Other	0	0.0%	2.1%	2.2%
Source: Census, 2011				

Indices of Deprivation

11.6 'Crime' should be noted as being a particular issue in the area with three of the ten highest levels of crime deprivation in Leicestershire.

Table 11.2: Melton Mowbray Indices of Deprivation		
Deprivation Domain	National Decile (1 most deprived)	Leicestershire Rank (1 most deprived)
Overall	3, 4, 8	14, 54, 207
Income	3, 5, 9	26, 78, 320
Employment	3, 5, 9	23, 92, 293
Education, Skills and Training	4, 5, 9	86, 166, 346
Health and Disability	4, 7, 10	30, 132, 337
Crime	1, 1, 1	4, 6, 10
Barriers to Housing and Services	4, 4, 5	75, 70, 116
Living Environment	3, 3, 5	33, 37, 98
Source: English Indices of Deprivation		

Work Day Population

11.7 Table 11.3 illustrates the occupations of the workday population in Melton Mowbray. A larger population of Melton Mowbray's work day population are employed in 'lower managerial, administrative and professional occupations' (25.1%) which is significantly higher than the LLEP (20.62%) and national rate (22.9%). There is also a higher representation of intermediate occupations, small employers and semi-routine occupations.

Table 11.3: Town Centre Work Day Population			
Occupation	Melton	LLEP	England and Wales
Higher managerial, administrative and professional occupations	5.1%	10.2%	11.3%
Lower managerial, administrative and professional occupations	25.1%	20.6%	22.9%
Intermediate occupations	18.1%	14.0%	14.0%
Small employers and own account workers	12.8%	9.6%	10.4%
Lower supervisory and technical occupations	7.7%	10.9%	7.6%
Semi-routine occupations	23.5%	22.9%	15.5%
Routine occupations	7.0%	16.2%	12.2%
Never worked and long-term unemployed	0.7%	3.1%	6.2%
Total Number	430	724,309	41.0m
Source: Annual Population Survey (2015)			

Economic Value of Melton Mowbray

11.8 Melton Mowbray's town centre has a GVA of £126.8m, which amounts to 12.0% of the total for all of the market towns included in this study. There are nearly 3,000 people employed in the town centre. Average GVA per worker is £43,460 which is around 3% above the County-wide average.

Table 11.4: Value of Town Centre Economic Activity in Melton Mowbray			
	Workers	GVA £m	Proportion
Melton Mowbray	2,918	126.8	12.0%
Total	**25,197**	**1,061**	**100.0%**
Source: ONS figures and ERS analysis			

Strategic Context

11.9 Melton Borough Council has produced an Economic Development Strategy covering the period 2015-2020 with the vision:

> *"To work in partnership to promote and support sustainable economic growth, making sure Melton is an exciting place and inspiring place to do business"*

11.10 Within this vision there are four strategic priorities, one of which is: 'Improving the vitality of the town and surrounding villages'. Within this priority were a number of key actions over the next five years, such that by 2020 a number of aims will have been achieved, including:

- The Town Centre Masterplan will ensure a first class shopping experience with a unique cultural draw and visitor concept.
- Broader and safer offer of the night-time economy increases evening footfall and improves the vitality of the Town Centre.
- The objectives of the Melton Mowbray Business Improvement District have been achieved.

11.11 The strategic vision and priorities for the town centre will be developed through the **Town Centre Masterplan, Town Centre Vision** and **Town Centre Investment Management** pilot. The Town Centre Masterplan will aim to improve and link retail, heritage and culture offer, the leisure areas and attract the right mix of shops to encourage more people to come into the town, stay longer and spend more. The Masterplan has clear aspirations to retain and improve the primary retail function of Melton Mowbray whilst attracting a variety of complementary uses (for example, heritage and culture) that will contribute to the vitality and viability of the centre and reinforce the distinctiveness of its physical environment. It is recognised that there is a significant difference between those using the centre during the day and during the evening. Ensuring there is a strong offer for the evening which is supported by creating a safe environment, is recognised as a key action supporting this priority.

11.12 The **Melton Local Plan (2014)** seeks to promote and manage development in a way which "consolidates and builds upon the unique reputation, heritage and character of Melton Borough and meets the needs of the local community, benefits the economy and maintains or improves the quality of the local environment". The Plan incorporates a designation for 3,985 new homes to be delivered around Melton Mowbray between 2011 and 2036. It also reasserts the role of Melton Mowbray Town Centre as the focus for retail growth in the Borough. In addition, a BID-backed business-led Town Centre Neighbourhood Plan is in gestation.

11.13 The **Town Centre Investment Management Pilot (2015)** was part of a national initiative supported by the Department of Communities and Local Government (DCLG). It sought to look at developing an asset based approach to managing the town centre. The Pilot programme undertook a partnership approach with local stakeholders including Melton Borough Council, Melton Business Improvement District (BID), Melton Town Estate and Leicestershire County Council (LCC). For all its attributes, Melton Mowbray was seen as lacking key attractors and anchor retailers that drive footfall, increase dwell time and spend levels. The Pilot was also about a change of role for town centres from being purely retail focused to becoming social, cultural and experience led centres, engines of economic growth and the location for new and exciting residential living.

11.14 Fragmented ownership was identified as a barrier to this type of growth and development, hence the Pilot adopted an approach to seek to remove/lower this barrier and at the same time create a basis for growth/attracting investment into the town centre. Specifically, this involved actively managing a critical mass of around 40 property interests by purchasing and/or pooling assets into an investment entity or joint venture vehicle such as a Real Estate Investment Trust (REIT) that allows the stock to be adapted, the mix of occupiers to be curated and the destination to be more effectively marketed.

11.15 The intention was that more active asset management would ensure that an appropriate balance of occupiers was achieved. In addition, the investment would provide commercial returns and as an income producing vehicle could attract fresh funds and reinvest in the public realm as well as ensuring other public assets and services are maintained in keeping with the desired offer.

11.16 The key findings of the national Pilot were that:

- Localism, BIDs and Neighbourhood Plans are important in building consensus around the need for development and significant structural change in the town centre;
- Single or collective ownership and management of a critical mass of properties that can be adapted to meet demand is undoubtedly effective;
- The principles of collective or single ownership can be applied to commercially smaller or less favourable locations, where commercial returns were found to be feasible;
- From consultations with investment funds, property companies and asset managers the TCIM model was seen as attractive to institutional investors as well as local funding partnerships;
- The recognition that an asset managed approach can add to the value and viability of peripheral areas, including housing and businesses around it.;
- Specialist asset management skills are critical to delivering performance; and
- The need for focus and alignment, e.g. the creation and designation of Town Centre Investment Zone (TCIZ), was recommended as a way to signal to investors that local leadership, services and initiatives are aligned with a clear strategy and vision for development, underpinned by a master plan, area action plan or Business Neighbourhood Plan that is endorsed by local communities and businesses.

11.17 In February 2015, Melton Borough Council was successful in being selected as a pathfinder **Food Entreprise Zone (FEZ),** a flagship Government initiative for economic growth to boost food and farming businesses by providing business support, productivity optimisation and simplified planning. It is one of only 17 FEZs in England and the only one in Leicestershire. It is hoped this will reinforce Melton's 'Food Capital' branding and thereby have spin-off benefits for the town centre.

11.18 Melton Mowbray **Business Improvement District (BID)** was established in 2011 and will seek a ballot for renewal in October 2016. The BID seeks to enhance the vitality of the town centre, raising its profile as a tourist and shopping destination and to reduce business costs through business schemes. The Melton BID generates an investment of £142,000 per annum for projects and schemes. The key BID aims are:

- Increased footfall into the town, therefore generating more spend
- A raised profile of Melton Mowbray as a shopping and tourist destination
- Local, regional and national marketing and promotion campaigns
- New events focused on key assets of the town, thus creating a more vibrant town centre

11.19 There are 3 key BID projects within the 5 year BID Business Plan 2011-2016:

- **Think Melton Shop Melton:** Which aims to build on Melton's Heritage encourage local residents and employees to shop locally through targeted campaigns to benefit town centre businesses. Projects have included a Town Centre App, Springboard Footfall Counter, Online Business Directory, 360 Google Tours.
- **BID for Business:** A project offering a range of activities to support businesses (such as business and employee car parking initiatives, and cost reduction pilot scheme). Projects have included Free Trade Recycling Scheme, £250 Business Support Grants, Social Media Training, Free Utility Audits, Free After Three car parking initiative, Business Awards & Community Awards.
- **Visitor Enhancement Scheme:** A project offering activities supporting the visitor economy in Melton Mowbray. Activities include town centre events, marketing and promotion. These activities aim to enhance the visitor experience, develop what the town has to offer and encourage visitors to stay longer, taking overnight stays instead of the current day trip. Projects have included 30,000 Events Guides 2015 & 2016, Sponsorship of Events, Dine Before Nine campaign, Silver Gilt Award East Midlands in Bloom and Silver Award Britain in Bloom Awards 2015, Town Centre Enhancement & Planting Scheme

11.20 A survey of residents carried out in 2012 indicated that there were perceptions of the town centre on an evening as being dark, unsafe and generally unattractive. Nevertheless, a 'Purple Flag' application is in gestation. Purple Flag is an accreditation process similar to the Green Flag award for parks and the Blue Flag for beaches. It is awarded to town and city centres that meet or surpass the standards of excellence in managing the evening and night time economy.

Progress Against Strategic Objectives

11.21 Melton's Economic Development Strategy has aims that it hopes will be realised by 2020. In respect of each aim, the consensus amongst study consultees seemed to be that: the Town Centre Masterplan has not yet delivered a first class shopping experience with a unique cultural draw and visitor concept; there is not yet a broader night-time economy offer and no discernible increase in evening footfall; and the objectives of the BID are being effectively pursued.

11.22 In respect of the town centre economy, study consultees believed that there has been very little progress, although it is thought that decline has been arrested and that this has been an achievement in itself. Housing designations are encouraging and could inject much needed additional demand into the local economy, but lack of developer interest needs to be addressed. The specific aspiration to develop a food enterprise centre (possibly on the cattle market site) has not been progressed, but still merits consideration.

11.23 The **People & Places Town Benchmarking Report (2014)** identified that Melton Mowbray was showing signs of improvement in a number of respects.

- Melton Mowbray continued to attract high visitor numbers in comparison to other large towns nationally, 41% compared to 35% respectively. Whilst visitor figures dropped slightly in 2014 from 44% in 2013 to 41%, tourist figures rose from 15% to 17%.
- Between 2012-13, 37.5% of businesses surveyed experienced turnover growth and 26% reported an increase in profits. Whilst staff numbers remained static, 64% of respondents were planning to expand their business over the next year, with 26% potentially increasing staff numbers.
- Between 2013-14, 44%% of businesses surveyed experienced an increase in turnover, compared to a national average of 41%. In addition, 44% showed an increase in profit, compared to a national average of 37%.
- Key barriers to growth were revealed to be competition (50%), rental values (50%) and car parking costs (50%).
- Highly rated aspects of the town centre included ease of walking (95%), access to services (92%), convenience (84%) and physical appearance (84%). This was notably higher than national statistics, and similar to other East Midlands comparator towns. The cafes/restaurants (74%) and markets (68%) were also rated positively and above both national and East Midland averages. Poorly rated aspects – as they are nationally - included traffic management and car parking.
- Negative aspects of the town centre were leisure facilities (69%), pubs/bars/nightclubs (62%) safety (54%) and car parking (58%).
- Footfall figures increased significantly in 2014, with an average number of 596 recorded on a Tuesday/market day, compared to 279 in 2013 and the national large town figure of 314. Thursday's footfall also increased to its highest level at 258, up from 156 in 2013 and above the national average of 193.

Retail Offer

Retail Composition

11.24 There are some multiples and lots of independent retailers. Sainsbury's opened in the town around two years ago, having reputedly been seeking a site for around 10 years. The relocation of the Borough Council offices provided a suitable re-development opportunity. Morrisons and Tesco already had a presence on the edge of the town centre. Lidl has recently come into the town centre and Aldi has submitted a planning application for a new store. In contrast, the Co-operative closed at the end of January 2016.

11.25 Vacancy rates have seen a gradual fall, down to 7% in 2013 and believed to be around 4% by the end of 2015 – the lowest figure in a decade. Indeed, the town centre has never suffered significant vacancy rates, even during economic downturns, and remains a popular visitor destination (not least for its food and drink offer). Such as they are, vacancies are concentrated in a small shopping centre owned by the Co-operative (the Bell Centre), which might have potential for conversion to craft units.

11.26 Of businesses in the town centre, 66% are classified as 'independent' compared to an average of 60% in other large towns[25]. Furthermore, the BID believes that latterly this percentage has been rising as more new start-ups have set up shop. In 2014 13 new businesses started in the town centre, 11 of which were independents.

11.27 The Cattle Market (which operates every Tuesday) is said to be a significant draw for the farming community. In addition, the town centre hosts a market every Tuesday and Friday and these too generate significant additional footfall, with people coming from as far as Leicester and Nottingham. The town centre market has seen a decline in traders, from 143 traders in 2013 to 116 in 2014, predominantly with a decrease in Saturday traders Nevertheless, the market is thought of being a valuable asset to the town, attracting tourists, visitors and locals. Survey data indicates that the market is thought by 87% of attendees to be 'excellent' or 'acceptable'.

11.28 Drawing on the most recent survey undertaken by Experian Goad (March 2015), the town centre comprises approximately 314 retail units. Retail uses in the centre are largely concentrated on and around Nottingham Street, Market Place, Sherrard Street and High Street being the principal streets.

[25] Town Centre Performance Report, 2014 (nb the national average refers to all those towns taking part in the benchmarking and not the UK national average)

11.29 The centre's convenience goods offer is marginally below average. However, this does not reflect the presence of food stores situated on the centre's periphery including Sainsbury's on Nottingham Road and Lidl on Scalford Road. Until recently, there was also a Co-operative store on Scalford Road.

Table 11.5: Melton Mowbray Town Centre Retail Composition				
Retail Category	No. Units	% of Total	UK Average (%)	Variance
Convenience	22	7.0%	9.2%	-2.2%
Comparison	97	30.9%	39.8%	-8.9%
Service	158	50.3%	37.4%	+12.9%
Vacant	30	9.6%	12.4%	-2.8%
Miscellaneous	7	2.2%	1.2%	+1.0%
TOTAL	**314**	**100%**	**100%**	**-**
Source: Experian Goad (March 2015) / 2015 UK Average (Experian Goad)				

11.30 In contrast, the centre's comparison shopping offer is around 9% below the current national average. Whilst there is scope for this to be improved, this may be challenging in the context of increasing polarisation of these types of outlets towards higher order centres and regional shopping destinations such as Leicester and Nottingham.

11.31 The centre has above average provision of units within service uses, equating to 50% of all units. Whilst there is a reasonable range of services on offer, there are also a noticeable number of hairdressers, fast food takeaways and cafés dominating this category.

11.32 Based on the 2015 data, the centre is performing very well in terms of the number of vacancies. This remains below average and is regarded as a strong indicator of good health, particularly in the current climate.

11.33 Overall, the retail composition of Melton Mowbray reflects an increasingly prominent role as a key service centre for the Borough. With the exception of Morrisons, the main convenience stores are increasingly located towards the centre's periphery and it will be important to support and encourage linked trips to ensure the centre continues to benefit from the attraction of these stores. Whilst there is scope to enhance the centre's comparison retail offer, this is likely to be challenging in current market conditions, particularly in seeking to attract key multiples. Developing a niche offer could assist in overcoming this. In addition, the TCIM Pilot is expected to play a key role in attracting investment into the town centre, to support the town's retail mix and offer

Available Retail Expenditure

11.34 This review of the town centre's current influence across the survey area for convenience and comparison goods is based on the results of the household survey of shopping patterns underpinning the **Melton Retail Study (2015)**.

11.35 Population estimates and forecasts for the survey area have been drawn from the Pitney Bowes GeoInsight database. This provides estimates of population based on projections and the 2011 census for small, localised areas. The population within the survey area is currently 67,472 and is forecast to grow to 69,938 by 2021 and to 72,242 by 2026. This equates to an overall projected growth of 7.1% over the next 10 years.

11.36 Total available expenditure in the survey area in forecast years is a product of both population change and spending growth applying these trend-based projections. The outputs of this analysis in terms of available 'retail' expenditure, is set out within the Table below.

Table 11.6: Forecast Available Retail Expenditure within Melton Survey Area

Year	Convenience Goods	Comparison Goods	Total Available Retail Expenditure
2016	£130.1m	£210.5m	£340.5m
2021	£138.4m	£280.1m	£418.5m
2026	£146.7m	£371.4m	£518.1m
% Growth 16'-26'	12.8%	76.5%	52.1%

Source: Turley (2015)

Current Shopping Patterns

11.37 Not all available expenditure generated within the survey area will be spent within Melton Mowbray town centre. Indeed, the results of the household survey (May 2015), which underpins the Melton Retail Study (2015), indicates that the town centre retains approximately 24% of convenience goods expenditure (£30.5m) generated within the survey area and approximately 28% of comparison goods expenditure (£58.7m).

11.38 Adopting this as the baseline position, the level of retail expenditure attracted to the town centre is in the order of £89.3m at 2016, equating to a market share within the survey area of 26%. This compares to a combined market share of 15% (£52,5m) currently drawn to other retail facilities surrounding the town centre including Sainsbury's, Nottingham Road and B&Q, Bell Green amongst others.

11.39 Overall, this implies that 58.4% of retail expenditure is currently drawn to other centres/retail destinations beyond Melton Mowbray and its immediate surroundings. This ‘leakage’ is largely attributed to comparison goods which is not unusual given the more limited and localised nature of the centre’s comparison goods offer. Leicester in particular, attracts approximately 15% of comparison goods expenditure from within the survey area.

11.40 In contrast, Melton Mowbray has a relatively strong rate of retention for convenience goods although this is largely strengthened by stores located on the town’s periphery. This once again reinforces the need to support and encourage linked trips between these stores and the town centre.

11.41 It should be noted that the household survey does not capture potential visitor expenditure (i.e. associated with tourism) which in the context of Melton Mowbray’s status as a visitor attraction would further boost the centre’s potential to capture associated additional retail expenditure.

Local Perceptions on Potential for Improvement

11.42 Attitudinal questions were asked as part of the household survey, which explored the extent of potential areas for improvement within the town centre.

Table 11.7: Suggested Improvements

Improvement	Proportion of Respondents
Better choice of shops in general	36%
More national multiple (high street chain) retailers	29%
More independent shops	16%
None mentioned	14%
Cheaper parking	13%
Better quality of shops	12%
More clothes retailers	6%
More parking	6%
More accessible car parking	4%
Fewer charity / discount retailers	4%
Improve appearance / environment of town centre	3%
Cleaner streets / removal of litter	3%
Bigger / better supermarket	3%

Source: Melton Household Survey (May 2015)

Summary

11.43 In the context of on-going structural changes in the retail market and continuing polarisation towards higher order centres (particularly for comparison goods), it will be challenging for Melton Mowbray to attract certain multiple operators and this should not be relied upon as a means to boost the vitality and viability of the town centre. There is though considered scope for Melton Mowbray to enhance the range and/or quality of its retail offer through continuing efforts to forge a niche role linked to its attraction as a tourist destination. In this context, Melton is branded as the Rural Capital of Food and successfully attracts a high number of visitors and tourists to the town.

11.44 Whilst it is inevitable that there will continue to be expenditure leakage from the area for certain goods (namely comparison), a combination of improvements to differentiate the town's offer should help to increase its appeal to both local residents and visitors alike which would help to offset such leakage and improve the centre's overall economic performance.

11.45 Interventions over recent years – shop front improvements, landscaping improvements, the establishment of the BID etc. – were all widely welcomed by consultees, although there was a sense that they had arrested decline rather than taken Melton Mowbray forward.

11.46 That said, the market is said to be still declining, in respect of both the number of stallholders and the variety of stalls. It was suggested that there would be merit in promoting opportunities to start-up stallholders. However, there is a view that there is a need for significant investment to upgrade the market, perhaps in the order of £75,000.

11.47 One idea was for local shops to promote themselves on market stalls in order to raise awareness about the breadth and quality of the retails/services offer. Consultees were of the view that it is the independent shops rather than the multiples that will attract people into the town centre and yet they individually lack the ability to promote themselves adequately.

11.48 Another suggestion is the erection of canopies within the town centre, providing protection from the weather and also an architectural feature. Furthermore, the positioning of canopies could help to drive footfall into particular areas.

11.49 Although the closure of the Co-operative is unfortunate, it does provide the opportunity to re-develop the site. No specific proposals have come forward - and it is not even known who, if anyone, is promoting the site to developers – but it would seem suitable for a new hotel, something which is believed to be required to boost the visitor offer. Similarly, the hospital site currently on the market is also a development opportunity.

11.50 There is perhaps an opportunity to build on the town's strengths in the food sector by providing accommodation for food and drink production, which could then be retailed in the town centre.

SWOT Analysis

Strengths

- Proactive town centre managers
- Town estate and town parks
- Tourism
- Melton BID
- Rural capital of food
- High profile and vibrant street markets
- Good town centre image & heritage
- Location of PERA in the town
- Good neighbourhood management
- Good CCTV coverage
- Links with Nottinghamshire/Vale of Belvoir
- Strong Business support
- Strong independent retail mix
- Low vacant unit rate
- Business champions
- Wide range of high profile events
- Farming community
- Strong links with LCC and Welland Market Towns
- Very popular and successful cattle market
- Proactive Council
- Extensive car parking in the centre of town

Weaknesses

- Reliance on major employers (Pedigree, Samworth, Pera
- Transport Links/Rural aspect
- Small representation of national/multiple retail mix
- Poor leisure offer and facilities in town centre
- Lack of accredited accommodation and budget hotel offer
- Coach park facilities for visitors and group travel operators
- Poor and unsafe perception of town centre's evening economy
- Under-utilisation of cattle market on non-market days
- Poor tourism signage
- Marketing opportunities not maximised
- Leakage of spend
- Restricted size of available commercial premises.

Opportunities

- Potential to further exploit Pera as a centre for SMEs
- Development of the cattle market (Southern end)
- Brooksby College site
- Town Centre Neighbourhood Plan
- Conservation area/Historic trails
- Tourism/coach visitors (linked to town estate plans)
- Development of PERA
- Museum
- Economic Development Strategy
- Visitor centre at Wilton park
- Local Plan development/Employment land opportunities
- Enterprise centre
- Development of vacant space above town centre units
- Significant Council land ownership
- Network Rail/London link/open up site
- Expansion plans by some employers
- Nottingham road development
- Some stores currently overtrading
- New housing

Threats

- PERA moving out of the town/borough
- Decline in farming/legislation
- By-pass (could remove passing trade to the town)
- Closure of two major employers (anchor stores)
- National decrease in inward investment by nationals/multiples
- Increasing impact of Internet competition on the High Street
- Increasing number of nationals/multiples going into administration

Potential Projects

11.51 Each of the below are regarded as potentially viable projects, albeit it has not been possible to determine potential costs or the likelihood of securing funding. These projects are aimed at recapturing some existing resident spending, capturing a good proportion of the spending of those who will move into new homes being built in the area and generating higher levels of visitor spending.

11.52 Whilst it is impossible to predict the impact any of these projects might have, a measure of the potential return on investment is that if by 2021 the percentage of retail expenditure currently drawn to other centres/retail destinations could be reduced by one tenth (from 58.4% to 52.6%), this would generate **an additional £24.3 million** of retail expenditure each year.

Digital Projects

This would comprise:

- Utilising the BID web-site there is a need to develop this web-site further with greater tourism links and link to a county-wide market town website.the provision of free wi-fi within the town centre
- delivery of a promotional campaign utilising social media (to local people as well as potential visitors) possibly involving students from Brooksby College

Regeneration Projects

This would comprise:

- Working with a County-wide key sites officer to facilitate development of key sites, such as the former Co-operative and site
- Becoming part of a County-wide market towns town centre Enterprise Zone
- The creation of pop-up shops/market stalls
- Business support for those wanting to commence food and drink production
- Moving forward with TCIM pilot proposals

12. SHEPSHED

Overview

12.1 Shepshed is the second largest town in Charnwood Borough, located around five miles West of Loughborough, on the western side of the M1 motorway.

12.2 Shepshed built its reputation and its wealth on the manufacturing and textiles industries, and this sustained a larger town centre. The current retail climate means that both the service and retail offers have diminished. The town has largely become a dormitory town for those commuting to work in Loughborough and along the M1 corridor. As a result, the employment level (60.9% of the working age population) remains relatively high (the national average is 54.2%).

12.3 Manufacturing still represents one third (32.9%) of total employment, with healthcare a further 15.4% (much of it in nursing and care homes). Employment in retail, professional and business services is relatively low. Most of the businesses and hence employment is based on industrial estates at the edge of the town along the A512.

12.4 The three key areas within the town are: The Bull Ring (the principal gateway); The Market Place (the heritage quarter); and Hall Croft (the 'heart' of the town and central meeting/pedestrian area)

Town Centre Population

12.5 Town centre economic activity (85.7%) is significantly above those for the LLEP (63.1%) and GB area (63.3%). Furthermore, the majority of people who are economically active in Shepshed town centre are employed and this is a positive indicator of the wider economic outlook for the town centre and the people that live and work there. Noteworthy is the high level of self-employed in the town centre (15.3%), indicating a more enterprising population relative to the regional and national comparators.

Table 12.1: Shepshed Town Centre – Population

	Town Centre		LEP	GB
	No.	%	%	%
All usual residents 16-64	189	100.0%	100.0	100.0
Economically active	162	85.7%	63.1%	63.3%
Employed	123	65.1%	48.0%	47.4%
Self employed	29	15.3%	7.8%	8.9%
Unemployed	5	2.6%	2.7%	2.4%
Full Time Student	5	2.6%	4.6%	4.7%
Economically Inactive	27	14.3%	36.9%	36.7%
Retired	10	5.3%	20.5%	21.4%
Student	3	1.6%	7.2%	5.3%
Looking after home / family	7	3.7%	3.9%	3.9%
LT Sick / Disabled	1	0.5%	3.3%	3.9%
Other	6	3.2%	2.1%	2.2%

Source: Census Data, 2011

Indices of Deprivation

12.6 Although Education, Skills and Training might be noted as being a particular issue in the area, this is only relative to other domains, with Shepshed exhibiting few signs of deprivation.

Table 12.2: Shepshed Indices of Deprivation		
Deprivation Domain	National Decile (1 most deprived)	Leicestershire Rank (1 most deprived)
Overall	8, 6	191, 110
Income	7, 6	193, 110
Employment	8, 6	230, 98
Education, Skills and Training	5, 4	147, 119
Health and Disability	7, 4	145, 40
Crime	6, 5	156, 137
Barriers to Housing and Services	9, 9	316, 294
Living Environment	5, 7	77, 182
Source: English Indices of Deprivation (2015)		

Work Day Population

12.7 Table 12.3 illustrates the occupations of the workday population in Shepshed. Shepshed has a low proportion of the work day population who have never worked or are long-term unemployed (1.4%). Shepshed's lower managerial workday population (19.1%) is significantly higher than that of the LLEP, but comparable to that of England and Wales. Furthermore, Shepshed has more than double the proportion of individuals employed in semi-routine occupations (37.9%) than both the LLEP area (14.2%) and England and Wales comparators (14.1%).

Table 12.3: Town Centre Work Day Population in Shepshed			
Occupation	Shepshed	LLEP	England and Wales
Higher managerial, administrative and professional occupations	4.5%	9.0%	10.2%
Lower managerial, administrative and professional occupations	19.1%	11.2%	20.8%
Intermediate occupations	10.7%	12.4%	12,8%
Small employers and own account workers	12.9%	8.5%	9.4%
Lower supervisory and technical occupations	6.2%	7.1%	6.9%
Semi-routine occupations	37.9%	14.2%	14.1%
Routine occupations	7.3%	13.6%	11.1%
Never worked and long-term unemployed	1.4%	5.5%	5.6%
Total Number	356	724,309	41.0m
Source: Annual Population Survey (2015)			

Economic Value of Town Centre

12.8 Shepshed's town centre has a GVA of £18.0m, which amounts to 1.7% of the total for all of the market towns included in this study. There are nearly 500 people employed in the town centre. Average GVA per worker is £37,277 which is around 11% below the County-wide average.

Table 12.4: Value of Town Centre Economic Activity in Shepshed			
	Workers	GVA £m	Proportion
Shepshed	482	18.0	1.7%
Total	**25,197**	**1,061**	**100.0%**
Source: ONS figures and ERS analysis			

Strategic Context

12.9 The **Shepshed Town Centre Master Plan (2013)** was commissioned by Charnwood Borough Council to create a vision and delivery framework that would improve the economic health and vitality of Shepshed Town Centre specifically. It was devised with considerable support from the Town Team in consultation with the wider community. The Town Team is a reference group bringing together the Council with local businesses, residents and community groups. It was established in 2012 for the purpose of creating the Master Plan and directing the regeneration process.

12.10 The Master Plan provides the framework within which detailed interventions can be designed, development proposals can be formulated, funding sought and planning policies prepared. It focuses interventions around a framework of complementary activities combining public realm improvements with strategies to relate character and identity to the town's retail function. It envisages the creation of three destinations along the spine, each with its own character, identity and economic rationale.

12.11 The Bull Ring would be the principal gateway to the town with Field Street consolidated as the traditional "High Street." Improved connections would be achieved with Hall Croft which would be the focal point for new mixed use development, an improved market and enhanced public realm providing a place to meet at the heart of the town. An enhanced Hall Croft would extend the pedestrian spine to link into Shepshed's heritage quarter as defined by the assemblage of traditional shops and public houses clustered around the Market Place. Delivery of the pedestrian spine is to be achieved through a phased programme of improvements to the public realm and encouragement of sympathetic development and supportive planning policies along the route.

12.12 The **Charnwood Local Plan 2011 – 2018 Core Strategy** (adopted November 2015) provides the overarching strategy for delivering growth in the district until 2028 and is based upon urban concentration and regeneration. The Core Strategy builds upon and complements the **Charnwood Sustainable Community Strategy 2008 and the Charnwood Council's Corporate Plan (2012-2016**). Based upon these 3 related frameworks the vision for Charnwood in 2028 is described as:

> "a desirable place to live, work and visit supported by a strong and diverse economy which offers a high quality and sustainable way of life. Landscapes, architecture and heritage will be cared for, access and availability to homes, jobs and services will be improved with Loughborough as the economic, social and cultural heart of the borough".

12.13 The **Council's Regeneration Strategy (September 2012)** has been fully integrated into the Economy and Regeneration aspect of the Core Strategy. The economic vision is to ensure that "Charnwood is open for business", that economic growth is sustainable and that the strategy will improve the district's economic responsiveness to the market in general and economic downturns in particular.

12.14 Regeneration of Shepshed Town Centre has been identified as one of the seven strategic priorities of the Council's Regeneration Strategy, demonstrating the importance of the town to the local economy. The Regeneration Strategy identifies the vision for Shepshed as establishing a:

> *"vital and viable town centre characterised by a mix of businesses, shops, cafes, bars, leisure and entertainment facilities supported by adequate convenient parking facilities and a public realm designed with pedestrian comfort and safety as a priority."*

12.15 The approaches thought likely to contribute towards the regeneration of Shepshed were stated as follows:

- supporting town centre development that increases economic and community activity, including supporting proposals that provide workspace and SME start-up space, supporting developments that improve access to community facilities and meeting identified floorspace needs for retail;
- supporting developments that improve accessibility to the centre through signage, pedestrian and cycle routes, enhanced public transport and highway improvements and traffic management and parking initiatives;
- improving the pedestrian environment, and public realm; and
- supporting development projects identified in the Shepshed Town Centre Regeneration Strategy, notably public realm improvements to the Bullring, Market Place and Hall Croft.

12.16 Grants towards shop front improvements have been available and were reported by study consultees to have made a significant difference to the appearance of a number of buildings and, thereby, the town as a whole.

Progress Against Strategic Objectives

12.17 Modest progress has been made with the implementation of the Master Plan. The adoption of the plan as part of the Local Plan evidence base has provided the policy justification for the negotiation of developer contributions towards public realm improvements within the town centre amounting to £147,000. In preparation for the deployment of that funding as it comes on stream through the completion of enabling development, consultants have been commissioned to draw up detailed proposals and costings for improvements to The Bull Ring, part of Field Street and related entry points to Hall Croft. Those plans will be offered up for public consultation in the Summer of 2016.

Retail Offer

Retail Composition

12.18 Drawing on data set out within the Charnwood Retail & Town Centre Study (2013), Shepshed district centre comprises approximately 70 retail units. These units are dispersed across the centre which is broadly arranged along a north-south axis, extending from Brook Street in the north to Charnwood Road in the south, although there are other intervening uses (including residential) which dilutes any sense of commercial focus. There is an Armstrong Mill factory outlet store on Charnwood Road outside of the Town Centre and there appear to be no linkages to encourage visitors to the store to go into the Town Centre after their visit.

12.19 The centre's convenience goods offer is broadly in line with the national average. This include representation from three multiple operators (Asda, Tesco and Co-op) alongside smaller, more localised outlets.

Table 12.5:Shepshed District Centre Retail Composition

Retail Category	No. Units	% of Total	UK Average (%)	Variance
Convenience	6	8.6%	9.2%	-0.6%
Comparison	25	35.7%	39.8%	-4.1%
Service	31	44.3%	37.4%	+6.9%
Vacant	4	5.7%	12.4%	-6.7%
Miscellaneous	4	5.7%	1.2%	+4.5%
TOTAL	**70**	**100%**	**100%**	**-**

Source: Charnwood Retail & Town Centre Study (2013) / 2015 UK Average (Experian Goad)

12.20 In contrast, the centre's comparison shopping offer is c. 4% below the current national average. This is not unusual for a centre of this scale and position in the retail hierarchy and in the context of increasing polarisation of these types of outlets towards higher order centres and regional shopping destinations such as Leicester.

12.21 The centre has above average provision of units within service uses, equating to 44% of all units. However, the overall range of services on offer appears to be relatively limited with a noticeable number of takeaways and hairdressers dominating this category.

12.22 Based on the 2013 data, the centre is performing very well in terms of the number of vacancies which, if this remains the case today, is broadly half the current national average. This would be regarded as a strong indicator of good health, particularly in the current climate.

12.23 Overall, the retail composition of Shepshed is not unusual for a district centre of this scale and position in the retail hierarchy. However, there is scope to enhance the range and quality of the retail and services on offer, to better align these with local needs and those of potential visitors.

Available Retail Expenditure

12.24 Having regard to the results of the household survey of shopping patterns underpinning the Charnwood Retail and Town Centre Study (2013), we have defined the primary catchment area (PCA) for Shepshed as comprising the following Local Authority Wards:

- Shepshed East; and
- Shepshed West

12.25 Population estimates and forecasts for the PCA have been drawn from the Pitney Bowes GeoInsight database. This provides estimates of population based on projections and the 2011 census for small, localised areas. Overall the population within the PCA is currently 13,997. This is forecast to grow to 14,263 by 2021 and to 14,548 by 2026. This equates to an overall projected growth of 4.5% over the next 10 years.

12.26 Total available expenditure in the PCA in forecast years is a product of both population change and spending growth applying these trend-based projections. The outputs of this analysis in terms of available 'retail' expenditure, is set out within Table 13.6 below.

Table 12.6: Forecast Available Retail Expenditure within Shepshed PCA

Year	Convenience Goods	Comparison Goods	Total Available Retail Expenditure
2016	£31.7m	£49.9m	£81.7m
2021	£33.2m	£65.4m	£98.6m
2026	£34.9m	£85.8m	£120.7m
% Growth 16'-26'	9.8%	71.8%	47.7%

Source: Turley (2015)

Current Shopping Patterns

12.27 Not all available expenditure generated within the PCA will be spent within Shepshed district centre. Indeed, the results of the household survey (November 2012), which underpins the Charnwood Retail and Town Centre Study, indicates that the district centre retains approximately 35% of locally generated convenience goods expenditure (£11.1m) and approximately 9% of locally generated comparison goods expenditure (£4.5m).

12.28 Adopting this as the baseline position, the level of retail expenditure attracted to the district centre would be in the order of £15.6m at 2016, equating to a market share within the PCA of 13%. This implies that 87% of locally generated retail expenditure is currently being lost as 'leakage' to other centres/retail destinations in the surrounding area.

12.29 This 'leakage' is largely attributed to comparison goods which is not unusual given the more localised nature of the centre's comparison goods offer and this, in itself, is also entirely consistent with Shepshed's current role and position in the retail hierarchy. However, we would expect a much higher rate of retention for convenience goods which, by its nature, is more localised.

12.30 The household survey results indicate limited in-flow of expenditure generated by residents living outside the PCA. It should be noted that the household survey does not capture potential visitor expenditure (i.e. associated with tourism) which would clear boost the centre should it attract such visits on a regular basis.

Local Perceptions on Potential for Improvement

12.42 Attitudinal questions were asked as part of the household survey, which explored the extent of potential areas for improvement within the district centre.

Table 12.7 Suggested Improvements

Improvement	Proportion of Respondents
No improvements needed	27%
More choice of shops (general)	21%
More clothes/fashion shops	10%
Specific shops missing from town centre (various)	7%
Banking provision	6%
More/improved supermarkets/ food retail	5%
Nicer shopping environment	5%
More independent shops	5%
More parking provision	5%
Fewer vacant units	3%

Source: Charnwood Retail & Town Centre Study (2013)

12.43 This indicates that just over a quarter of respondents were satisfied with local retail provision. This could also reflect the fact that, certainly for comparison goods, local residents 'needs' are being satisfactorily met by other, accessible centres in the wider area, notably Loughborough which attracts approximately 38% residents' comparison shopping trips from the Shepshed area.

Summary

12.44 In the context of on-going structural changes in the retail market and continuing polarisation towards higher order centres (particularly for comparison goods), it will be challenging for Shepshed to attract certain multiple operators and this should not be relied upon as a means to boost the vitality and viability of the district centre.

12.45 There is considered scope for Shepshed to enhance the range and/or quality of its retail and service offer through encouraging independent, bespoke and specialist outlets which will also help to differentiate it from nearby competitors. This should be supported by efforts to improve connectivity and legibility around a more focused commercial heart within the centre. This will help to concentrate footfall and activity and ensure that operators are able to mutually benefit as a critical-mass.

12.46 Whilst it is inevitable that there will continue to be substantial expenditure leakage from the area for certain goods (namely comparison), a combination of improvements to differentiate the town's offer should help to increase its appeal to both local residents and visitors alike for occasional visits which would help to offset such leakage and improve overall economic performance.

12.47 The scope to redevelop and increase retail floorspace is considered limited given the historic layout of the town centre. Additionally, there are relatively few vacant buildings and a limited amount of land available for development. Consequently, the masterplanning exercise – reaffirmed by consultations and analysis undertaken as part of the research for this study – indicated that a more pragmatic way forward is to pursue social and economic interventions, supported by environmental improvements.

12.48 Charnwood Borough Council has a relatively new core strategy and planning permission for a significant number of new housing units has already been granted, both in Shepshed itself and at a proposed Sustainable Urban Extension at Garendon, between Loughborough and Shepshed. The urban extension is expected to deliver approximately 2,440 new homes, jobs and leisure facilities by 2028. Planning permissions in and around Shepshed will deliver a further 1,200 homes. In combination these developments will bring significant growth in local household spending capacity which could be captured in part by Shepshed town centre to the benefit of businesses specifically and the overall destination in general.

SWOT Analysis

Strengths	Weaknesses
• Active Town Team • Strong community spirit	• Difficult layout of roads and buildings • Very limited good quality retail and hospitality offer • Lack of cultural and leisure opportunities (very limited evening economy) • Over-reliance on hairdressers and take-aways • Market in decline
Opportunities	**Threats**
• Re-development of former Britannia Inn site • Significant new housing developments	• Becoming a purely dormitory town • Inappropriate/sub-optimal development on Britannia Inn site

Potential Projects

12.49 Each of the below are regarded as potentially viable projects, albeit it has not been possible to determine potential costs or the likelihood of securing funding. These projects are aimed at recapturing some existing resident spending and capturing a good proportion of the spending of those who will move into new homes being built in the area.

12.50 It is noted that there were suggestions to demolish buildings in order to open up views and improve access to the Hall Croft area. Whilst this would undoubtedly bring benefits, it seems unlikely that they would exceed the substantial costs of acquiring and demolishing the properties in question.

12.51 Whilst it is impossible to predict the impact any of these projects might have, a measure of the potential return on investment is that if by 2021 the percentage of retail expenditure currently drawn to other centres/retail destinations could be reduced by one tenth (from 87.0% to 78.3%), this would generate an **additional £8.6 million** of retail expenditure each year.

Digital Projects

This would comprise:

- the development of a town centre website linked to the existing Town Council website which then, links to websites for other Leicestershire market town
- the provision of free wi-fi within the town centre
- delivery of a promotional campaign utilising social media (to local people and new incomers in particular)

Quality Enhancement Projects

This would comprise:

- Public realm improvements within Market Place, Hall Croft and The Bull Ring in order to deliver the "pedestrian spine."
- The widening of footpath and narrowing of roads
- Better signage

Regeneration Projects

This would comprise:

- Working up a development scheme for the former Britannia Inn site that is of intrinsic economic vale and adds value to/complements neighbouring uses
- Becoming part of a County-wide market towns town centre Enterprise Zone

Promotional Projects

- Capturing the attention of newcomers could be facilitated by having promotional literature sent to all new homes (or incorporated within the existing 'Shepshed Eye' publication) to make them aware of what Shepshed has to offer, and which will also highlight gaps which could encourage those moving into the area to start a business locally.

13. WIGSTON

Overview

13.1 Wigston Magna is located within the borough of Oadby and Wigston. It is situated just 5 miles to the south of the city of Leicester and is 5 miles from the M1/M69. Wigston is almost indeterminable as a settlement in its own right and only small areas of open land separate it from Leicester. The Borough also includes high streets at South Wigston and Oadby.

13.2 Earliest records of Wigston date back to the Doomsday book. The dominant industry in the town was framework knitting and hosiery manufacture and although this no longer exists, the Framework Knitting Museum displays the heritage of the industry. More recently, the town acts as a service centre for local residents, many of whom commute into Leicester for employment. Wigston has some national retailers operating from the centre along with a selection of independents.

13.3 Wigston town centre is the largest centre in the Borough of Oadby & Wigston. The main shopping area is situated along Leicester Road and Bell Street. There are additional shops located in 'the Arcade' and at the retail warehouses on Bull Head Street to the south of the centre. The catchment of the town is primarily local and due to its location it has strong competition not only from Leicester and Fosse Park, but also Blaby, Hinckley and Market Harborough.

Town Centre Population

13.4 Wigston Town Centre compares favourably in terms of economic activity (64.7%) with the LLEP (63.1%) and national averages (63.3%). However, the unemployment rate is significantly higher than the comparator areas at 6.5% compared to 2.7% and 2.4% for the LLEP area and national averages. There are a number of council owned blocks of flats within the town centre area, together with terraced housing. In terms of economic activity, it is slightly lower in Wigston town centre compared to the comparator areas.

Table 13.1: Wigston Town Centre – Population

	Town Centre		LLEP	GB
	No.	%	%	%
All usual residents 16-64	215	100.0%	100.0	100.0
Economically active	139	64.7%	63.1%	63.3%
Employed	101	47.0%	48.0%	47.4%
Self employed	15	7.0%	7.8%	8.9%
Unemployed	14	6.5%	2.7%	2.4%
Full Time Student	9	4.2%	4.6%	4.7%
Economically Inactive	76	35.3%	36.9%	36.7%
Retired	24	11.2%	20.5%	21.4%
Student	17	7.9%	7.2%	5.3%
Looking after home / family	16	7.4%	3.9%	3.9%
LT Sick / Disabled	12	5.6%	3.3%	3.9%
Other	7	3.3%	2.1%	2.2%
Source: Census, 2011				

Indices of Deprivation

13.5 As the town centre is covered by two areas, it generates two scores. One of the town centre areas clearly has particular issues relating to 'Education, Skills and Training' and 'Health and Disability'.

Table 13.2: Wigston Indices of Deprivation		
Deprivation Domain	National Decile (1 most deprived)	Leicestershire Rank (1 most deprived)
Overall	3, 6	16, 99
Income	3, 6	25, 109
Employment	3, 5	16, 94
Education, Skills and Training	2, 5	41, 123
Health and Disability	2, 6	5, 80
Crime	3, 5	36, 109
Barriers to Housing and Services	8, 7	223, 199
Living Environment	3, 5	38, 74
Source: English Indices of Deprivation (2015)		

Work Day Population

13.6 Table 13.3 illustrates the occupations of the workday population in Wigston. In the town centre there is a higher proportion of the population working in 'lower managerial, administrative and professional occupations' (17.9%) compared to LLEP (11.2%), but slightly lower than England and Wales rates (20.8%). Furthermore, there is a significantly higher representation of semi-routine occupations (20.2%) and also half the representation of higher managerial roles (4.2%) when compared to LLEP and England and Wales averages again linked to the lower quality housing stock which would not attract Higher Managerial workers.

Table 13.3: Town Centre Work Day Population			
Occupation	Wigston	LLEP	England and Wales
Higher managerial, administrative and professional occupations	4.7%	10.2%	11.3%
Lower managerial, administrative and professional occupations	20.4%	20.6%	22.9%
Intermediate occupations	12.4%	14.0%	14.0%
Small employers and own account workers	9.5%	9.6%	10.4%
Lower supervisory and technical occupations	10.9%	8.0%	7.6%
Semi-routine occupations	22.9%	16.1%	15.5%
Routine occupations	16.2%	15.3%	12.2%
Never worked and long-term unemployed	3.1%	6.2%	6.2%
Total Number	550	724,309	41.0m
Source: Annual Population Survey (2015)			

Economic Value of Wigston

13.7 Wigston's town centre has a GVA of £49.9m, which amounts to 4.7% of the total for all of the market towns included in this study. There are more than 1,200 people employed in the town centre. Average GVA per worker is £42,805 which is marginally above the County-wide average.

Table 13.4: Value of Town Centre Economic Activity in Wigston

	Workers	GVA £m	Proportion
Wigston	1,210	49.9	4.7%
Total	**25,197**	**1,061**	**100.0%**
Source: ONS figures and ERS analysis			

Strategic Context

13.8 The **Spatial Strategy (2010)** outlines the vision for the future of Wigston as:

> *"A 21st Century town, benefitting from high quality town centre development and a significant strengthening of the retail and office offer. A sustainable mixed use centre offering shopping, leisure, employment and residential opportunities, as well as civic functions serving the whole Borough."*

13.9 In pursuing this vision, the strategy focused on the town's role as the main shopping and office location in the Borough. Increasing the retail and office offer was expected to help to bring employment into the town as well as support existing and proposed retail provision. In addition, increased residential development was expected to help to activate the town for longer periods during the day and night, and establish more leisure provision. The strategy was designed to ensure that the town does not compete with other centres in the Borough and should achieve some clawback from larger centres.

13.10 Specific objectives were:

- To establish a distinct and sustainable role for Wigston by encouraging the growth of the town's retail, office and civic function;
- To encourage the growth of economic and social benefits for local people by providing service facilities within the town as well as new employment opportunities;
- To improve and diversify the town centre offer by introducing a range of new improved retail floorspace as well as commercial floorspace;
- To provide a safe/legible town centre through well designed new development and improvements to existing environments and the extension of The Lanes forming a 'backbone' to the town's pedestrian network;
- To achieve an attractive and accessible place to shop, live, work and visit by ensuring the highest standards of design and to the delivery of the regeneration of Wigston; and
- To use the planning system and joint working with developers through the development process to deliver high quality and inspirational design in Wigston Town Centre.

13.11 It was felt that in order to promote Wigston town centre, attention needed to be paid to the centre's identity. There was considered to be a need to develop a well-defined and compact core offering, with a distinguishable identity to attract visitors and business from competing centres.

13.12 The **Core Strategy for Oadby and Wigston (2010)** outlined the vision for the Borough as:

> *"People aspire to live in the Borough of Oadby and Wigston because it is a safe, clean and attractive place, with a prosperous economy, vibrant town centres and healthy empowered communities."*

13.13 The Strategy set out a number of issues and challenges that the Council hoped to tackle through the delivery of the Strategy and its associated plans. To some extent these issues are all appropriate to consider as part of the regeneration of Wigston and Oadby town centres:

- The quality of the built environment;
- A more prosperous and dynamic economy;
- Reducing the shortfall in affordable housing;
- The regeneration of Wigston, Oadby and South Wigston;
- Locating development so as to improve public transport and reduce car use; and
- Sustainable design being integral to new development.

13.14 It was noted that Wigston Town Centre had suffered from a lack of investment, which was particularly notable in relation to public realm, quality of design and under-utilisation of land that might be available to support economic growth. This lack of investment (and investment in Leicester City Centre as the prime shopping and business destination) had negatively impacted on footfall in the town.

13.15 The **Wigston Town Centre Area Action Plan Baseline Report (2007)** put forward the view that Wigston has a niche role as a district centre, providing convenience goods, services and local comparison shopping for the south east quarter of the Leicester conurbation. Based on the information outlined in the Baseline Report, the Borough Council has a developed the **Wigston Town Centre Masterplan (2007)** with the aim to achieve the following approximate levels of development:

- 9,000sqm (96,875sqft) new office floorspace including a new health centre;
- 11,800sqm (127,100sqft) new retail space (gross);
- 150 new residential units;
- At least 500 car parking spaces;
- The extension of The Lanes to secure a continuous pedestrian spine in the area; and
- New and improved areas of public realm including the pedestrianisation of Bell Street.

13.16 The **Town Centre Area Action Plan (2013)** was produced to form the planning basis for the determination of development proposals within Oadby and Wigston town centres. The Plan highlights the sustainable development of both towns is crucial to ensure their successful futures.

13.17 The Area Action Plan has a number of spatial objectives in order to regenerate Wigston Town Centre. The Plan sets out Development Control Policies that directly relate to the development of the town. The aim of the policies are to safeguard the vitality of the town, improve access and movement, and encourage more development in the town centre as opposed to more peripheral locations. Policies include:

Presumption in favour of sustainable development: The council will work proactively with applicants to secure development to improve the economic, social and environmental conditions of the town centre.

Town Centre: The council will consolidate the town centre boundaries. Retail, leisure and commercial proposals will be directed towards primary and secondary frontages and allocated development sites.

Primary Frontages For the ground floor of primary frontages planning permission will be granted for non A1 (i.e. non retail) uses providing more than 70% of units within all frontages in Wigston (90% of units on Bell Street) remain in A1 retail use, and no more than three consecutive units are in non-A1 use on the frontages. Proposals not conforming to these requirements will not be granted unless significant regeneration benefits can be demonstrated.

Secondary Frontages: Ground floor secondary uses will be granted for a range of business and retail usages. Food and drink establishments will be permitted as long as they do no impact adversely on vitality and viability of the town as a whole.

Other areas within the town centre boundary: Within the town centre but beyond the primary and secondary frontages proposals for the change of use to residential will be considered favourably. As will other uses such as offices or community facilities. Proposals to change buildings to use that would be better located in the core of the town centre need to demonstrate why they cannot be located in primary or secondary frontage.

Public Realm: All proposals for significant development must include public realm improvements. Impacts on public realm must ensure the pedestrian is prioritised over other modes of transport and that materials/design are of the highest standards.

Transport and Movement: All proposals must fully demonstrate how access will be achieved by the full choice of sustainable transport modes and maximise the opportunity to use alternative means of travel to the private car.

13.18 As part of the Wigston Town Centre Area Action Plan a **Town Centre Business Survey** was conducted. The primary strengths of Wigston Town Centre from a business point of view were the availability of car parking, the variety of shops and the accessibility and compactness of the town centre. 17% of the businesses surveyed thought the town centre had no positive features highlighting weaknesses in quality of the environment/streetscape and vandalism/crime/anti-social behaviour. Businesses thought that by addressing these negative features of the town centre, footfall and trade increases would occur.

13.19 Businesses surveyed also thought that the town's appearance could be improved through a range of small scale physical appearance projects. These included: putting flowers, trees and other landscaping on the shopping streets; and better maintenance of pavements.

Progress against strategic objectives

13.20 The **Oadby and Wigston Annual Monitoring Report 2013-2014** finds that progress against key town centre indicators is below the level targeted.

Table 13.5: Progress Against Key Town Centre Indicators

Policy	Indicator	Actual	Target
Retail 1	Amount of additional retail within the town and district centre boundaries	0	20,428sqm
Retail 2	Percentage of retail units in designated primary shopping areas	Wigston – 79%	Wigston – 70%
Employment 1	Loss of Identified Employment Land	0	No loss
Employment 2	Amount of employment land provided in the Direction for Growth	0	2.5-3.5 hectares
Employment 3	Amount of additional office space provided in the town and district centres	0	5,800sqm
Source: Oadby and Wigston Annual Monitoring Report 2013-2014			

13.21 Public consultation on a Local Development Order for a housing development on Paddock Street is currently underway. The plans include the approximately 150 residential units in a mix of town houses, apartments, retail and leisure (approximately 260 sqm). This development includes the condition to not lose any car parking spaces on the site. It is hoped that this relaxation of planning procedures will entice development to come forward.

13.22 The Borough Council is looking to pursue the comprehensive redevelopment of the Burgess Junction site which would include:

- 9,400sqm new retail floorspace;
- 8,725 sqm new commercial floorspace;
- Multi-storey Car park to provide at least 400 spaces
- Public realm improvements

13.23 Proposals for the Chapel Mill development suggest that the Borough Council will pursue the continued improvement of Bell Street's public realm, as well as development to include:

- A new public town square environment to the west of the existing library
- New retail development approximately 1,765sqm up to three stories in height
- A new public transport area, taxi rank and associated facilities
- A standalone office development on Frederick Street up to three stories in height
- The retention of access to spring lane
- Provision of disabled car parking

Retail Offer

Retail Composition

13.24 The **Oadby and Wigston Retail Capacity Study (2008)** notes that the two most important centres outside the Borough which will be used by local residents are Leicester City Centre and Fosse Park. These two centres have a significant impact upon the provision within the Borough due to their close proximity and superior retail offer.

13.25 Drawing on the data contained within Retail Capacity Study, which was based on 2007 Experian Goad survey data, the town centre comprises approximately 132 retail units. The main shopping area is focused along Leicester Road and Bell Street. This is supplemented by 'the Arcade' and retail warehouses located on Bull Head Street to the south of the centre.

13.26 The centre's convenience goods offer comprises a total of 19 units which exceeds the national average by 5.1%. This includes representation from several multiple convenience operators including Sainsbury's, Co-op, Aldi Iceland and Farm Foods.

Table 13.6: Wigston Town Centre Retail Composition

Retail Category	No. Units	% of Total	UK Average (%)	Variance
Convenience	19	14.4%	9.3%	+5.1%
Comparison	66	50.0%	40.3%	+9.7%
Service	43	32.6%	37.9%	-5.3%
Vacant	4	3.0%	12.6%	-9.6%
TOTAL	**132**	**100%**	**100%**	**-**

Source: Table 2.1, Oadby and Wigston Retail Capacity Study (2008) / 2015 UK Average (Experian Goad)[26]

13.27 The centre's comparison retail offer also exceeds the national average by 9.7% although this predominantly comprises independent retailers located along Leicester Road. There is some representation from multiple comparison retailers, including Boots, Superdrug, Evans and Card Factory. These retailers are largely located along Bell Street where they benefit from proximity to the Sainsbury's foodstore which acts as an anchor. However, there a significant number of Charity Shops.

[26] Re-weighted to remove 'miscellaneous'

13.28 Service uses are below the national average (-5.3%) although this is not in itself an indication of a poorly performing town centre.

13.29 The vacancy rate is well below the national average (-9.7%) with just four units identified as vacant. If this remains the case today, this would be considered a strong indicator of good health and would show some resilience in the face of changing retail trends and consumer shopping patterns.

13.30 Overall, the retail composition of Wigston indicates a reasonable mix and choice of uses, which enable people's day to day shopping needs to be met. The centre has above average representation from convenience and comparison retailers, comprising predominantly independent operators. Whilst there is limited representation from multiples, this is not unusual for a centre of this scale and position in the retail hierarchy. Not relevant

13.31 As a result of the town's small centre there is limited information available as to the rental values. Primary research conducted by the council to inform the Town Centre Masterplan, and research taken from Savills local agents, suggests core retail pitch is achieving rental values of around £31 per square foot. The table below summarises how this rent compares to other areas.

Table 13:7: Comparison of Rental Values	
Centre Zone A Rental Values (per sq ft)	
Oadby	£25
Wigston	£31
South Wigston	£12
Leicester	£210
Market Harborough	£50
Coventry	£175
Loughborough	£80
Lutterworth	£32

13.32 As can be seen, Wigston's (£31) rental value is significant below the larger shopping centres. Wigston rental values are towards the middle of other areas in the study. For example, whilst areas such as Loughborough (£80) and Market Harborough (£50) attract higher rents than Wigston, other areas such as Lutterworth (£32), Oadby (£25) and South Wigston (£12) are either in line or lower than the Wigston Value.

Available Retail Expenditure

13.33 Having regard to the results of the household survey of shopping patterns underpinning the Oadby and Wigston Retail Capacity Study (2008), we have defined the primary catchment area (PCA) for Wigston as comprising Zone 2[27] of the defined Study Area.

13.34 Population estimates and forecasts for the PCA have been drawn from the Pitney Bowes GeoInsight database. This provides estimates of population based on projections and the 2011 census for small, localised areas. Overall the population within the PCA is currently 24,256. This is forecast to grow to 24,639 by 2021 and to 25,118 by 2026. This equates to an overall projected growth of 2.4% over the next 10 years.

13.35 Total available expenditure in the survey area in forecast years is a product of both population change and spending growth applying these trend-based projections. The outputs of this analysis in terms of available 'retail' expenditure, is set out within Table 13.8 below.

Table 13.8: Forecast Available Retail Expenditure within Wigston PCA

Year	Convenience Goods	Comparison Goods	Total Available Retail Expenditure
2016	£44.8m	£70.9m	£115.7m
2021	£46.2m	£91.4m	£137.5m
2026	£48.2m	£119.4m	£167.7m
% Growth '16-'26	7.7%	68.4%	44.9%
Source: Turley (2015)			

Current Shopping Patterns

13.36 Whilst now somewhat dated, the results of the household survey (May 2008), indicates a reasonable level of expenditure retention for convenience goods within the PCA, with a market share of approximately 44% (£19.6m). Closer analysis identifies other stores which are particularly influential in the PCA and present competition to Wigston, including the Asda, Oadby town centre and Tesco, South Wigston.

13.37 In contrast, the centre achieves a comparison goods market share of 24% market share, which equates to £17.0m of locally generated comparison goods expenditure.

13.38 Adopting this as the baseline position, the level of retail expenditure attracted to the town centre is in the order of £36.6m at 2016, equating to an overall market share within the PCA of 32%.

13.39 Overall therefore, 68% of retail expenditure generated within the PCA is currently drawn to other centres/retail destinations beyond Wigston town centre. This 'leakage' is largely attributed to comparison goods which is not unusual given the proximity of competing centres such as Leicester and out-of-centre retail provision including Fosse Park.

[27] Broadly equivalent to the following wards: Wigston – Fields, St Wolstan's, All Saints and Maeadowcourt.

13.40 Overall, Wigston provides a reasonable mix and choice of uses, which enable people's day to day shopping needs to be met. The centre has a good choice of convenience goods on offer, although its market share within the PCA is not as high as it could be, reflective of competition in nearby centres including Oadby and South Wigston. Whilst the centre has above average representation from comparison retailers, this predominantly comprises independent operators with limited representation from multiples. Reflecting this, the centre's comparison goods market share is much lower (24%) and there are high levels of leakage to other competing centres including Leicester, as well as out-of-centre provision such as Fosse Park.

13.41 With changes in the retail market and continuing polarisation towards higher order centres (particularly for comparison goods), it will be challenging to attract certain multiple operators and cannot be relied upon as a means to boost the vitality and viability of the district centre.

Local Perceptions on Potential for Improvement

13.42 The 2008 Household Survey (sample size unknown), commissioned by the District Council asked residents what they liked about the town centre – 19.3% of respondents stated they never visit Wigston for shopping or leisure, and 15.0% said that they liked nothing or very little about Wigston. The factors that did score highly amongst respondents was the good amount on non-food shops (17.1%), good food shops (8.3%) and the attractive environment (5.9%).

13.43 Residents were also asked what they disliked about the town centre. The majority of residents (55.4%) stated there was nothing or very little that they disliked about Wigston town centre. Of those that responded the factors that concluded them to dislike the town centre were; poor range of shops (7.3%), difficulty to park near to the shops (4.1%) and difficult to access (3.8%)

13.44 Respondents were asked what improvements, if any, would encourage a visit to the town centre for them to shop or visit leisure attractions in Wigston more often. Nearly half of all respondents (46.1%) stated that there were no improvements that would make them visit the town centre more. 14.7% were not able to suggest any improvements. Of those offering suggestions 15% state that they would like to see more/better shops, 8.5% wanted better car parking, 3.25% wanted to see cleaner streets and 2.1% wanted more pedestrianised streets.

Summary

13.45 Wigston is a key service centre for Leicester's southern conurbation. The prevalence of convenience units compared to the national average for town centres (due to the presence of stores such as Sainsbury's and Aldi) means that it is well placed to fulfil community shopping needs. The number of independent stores also provides local interest and a unique selling point. This is something that Wigston could capitalise upon, providing the centre with an 'identity' in which to market itself against comparator town centres.

13.46 The closure of the Co-op and the uncertainty about the future of the Post Office within it are current risks in terms of maintaining the attraction of Wigston as a stopping point. There is a perception of a downward trend and vacant sites should be actively marketed to reduce the negative impact of vacant stores.

13.47 The business community in Wigston reports a very difficult trading environment primarily due to the competition from the internet.

13.48 Improvements to public realm are urgently needed to the main street encourage those passing through the town to stop in. These improvements should co-ordinate with those implemented already on Bell Street.

SWOT Analysis

Strengths

- Compact town centre, pedestrian friendly shopping areas e.g. Bell Street
- Free car parking
- Variety of retail offer i.e. national supermarkets
- District centre serving a large and well populated catchment area, as well as generating very high catchment spend (£48 million)
- Key service centre for Leicester's southern conurbation
- Buoyant residential market
- Under average house prices may help to retain younger residents
- Large area of public open space
- Popular community allotments giving residents pride in their town
- Easily accessible location by motorway
- Plentiful leisure facilities, helping to further establish an evening and night-time economy
- Memorial park is a major asset for the Town
- Personalisation of public realm
- Space for overspill activity

Local Development order

Weaknesses

- Strong competition from Fosse Park, and a limited range of national multiples
- Further competition from Oadby (just two miles away)
- Low quality built environment and public realm (no benches etc)
- No street or farmers market (due to market charter).
- Very few offices
- Catchment area insufficient to attract volume users such as cinemas and bowling
- Lack of variation in Townscape
- Large format retail within the town centre
- Quality of the car parking
- Public realm quality overall is poor
- Many alleyways with blank facades
- High levels of unemployment in the town centre
- Pockets of deprivation
- Dependency on the public sector/lower-skilled jobs

Opportunities

- Fledgling night-time economy that could be capitalised on
- Identified demand from national retailers subject to appropriate sized premises being made available
- High percentage of independents potentially gives Wigston a distinctive branding offer
- Bell Street offers larger units, acting as a pull for national multiples.
- Changing trends in the office market may encourage relocation to peripheral towns such as Wigston
- To create more key open spaces
- To integrate the 'Town centre with the Conservation Area'
- To create better links to the existing residential areas and other centres
- Shop front Improvement Scheme
- Development sites to encourage further investment into the Town Centre
- Town scheme Initiatives e.g. grants for reinstating original features to properties
- Development Opportunities
- To build upon tourist offer

Threats

- Large comparison goods retailers likely to go to Leicester city centre or Fosse Park
- Strong independents representation does not necessarily equate to strong, viable businesses
- Lack of suitable larger modern units for expansion of existing traders
- Office demand is limited by the close proximity of Leicester City Centre and in office parks located along the M1
- Leicester and Fosse Park compete for evening/night-time visitors (e.g. leisure, restaurants, etc)
- Quality of the setting is lost
- Areas of un adopted public realm
- The new developments will detract from the existing quality of the architecture

Potential Projects

13.49 The projects below are aimed at recapturing some existing resident spending, capturing a good proportion of the spending of those who will move into new homes being built in the area and generating higher levels of visitor spending.

13.50 Whilst it is impossible to predict the impact any of these projects might have, a measure of the potential return on investment is that if by 2021 the percentage of retail expenditure currently drawn to other centres/retail destinations could be reduced by one tenth (from 58.4% to 52.6%), this would generate an **additional £24.3 million** of retail expenditure each year.

Digital Projects

This would comprise:

- the development of a town centre website, linked to websites for other Leicestershire market town, which could be used to promote events, business offers etc.
- the provision of free wi-fi within the town centre
- delivery of a promotional campaign utilising social media (to local people and new incomers in particular), possibly utilising students from South Leicestershire College.

Quality Enhancement Projects

This would comprise:

- Public realm improvements on Leicester Road, including basic improvements to bins, railing and benches to address business concerns about the quality of the built environment.

Regeneration Projects

This would comprise:

- Delivery of one of the mixed use key regeneration projects listed in Town Centre AAP
- Delivery of the adopted LDO for Long Lanes , Wigston
- Becoming part of a County-wide market towns town centre Enterprise Zone
- Establishing a local business network/group
- A high quality, landmark project (e.g. community arts centre).

Promotional Projects

- Focusing on availability of vacant units

14. CONCLUSIONS AND RECOMMENDATIONS

14.1 Leicestershire's market towns are incredibly important to the County's economy. The town centres alone of the 11 towns covered by this research provide employment for more than 25,000 people and generate a combined Gross Value Added (GVA) of £1.1 billion. Furthermore, they have the potential to contribute additional economic value, provided investments of appropriate types and scale are made in projects that can generate growth.

14.2 The SWOT analysis below summarises Strengths, Weaknesses, Opportunities and Threats that are common to many of the market towns that feature in this report.

Strengths	Weaknesses
- Compact town centres - Variety of retail offer, including good range of independents - Low levels of vacancies - Attractive/historic character - Parks/public open space - Good community spirit/high level of community activity	- Limited cultural/leisure provision - Limited evening economy - Limited good quality retail/hospitality offer - Market in decline - Poor quality/high cost/limited capacity of car parking - Low quality built environment/public realm
Opportunities	**Threats**
- Potential to secure spend from new housing developments - Redevelopment opportunities at key sites - To create better links between areas through improved signage/development of town trails - Public realm improvements - To build on tourist/visitor offer - Build on the number of BIDS within county towns	- Leicester city centre and Fosse Park, including potential expansion of the latter - Traffic congestion

14.3 Whilst the study team has approached this exercise seeking bottom-up, town-specific solutions to the issues faced in each location, it is apparent from our research that there are issues common to multiple towns. Appendix 5 lists all current and potential projects in each town and County-wide in further detail. In respect of strategic alignments, all of the proposed projects accord with relevant local strategies and statutory plans and have the potential to contribute to the ambitions of LLEP.

14.4 We propose the creation of a feasibility/project development fund to enable these projects to be worked up in more detail. At present, very few projects have been costed, hence making a judgement on deliverability difficult.

14.5 Finally, time is of the essence. All market towns are set to grow, some with sizeable new housing designations. Investing in them now will help to retain and maximise related economic benefits; failing to do so may see these towns and the County missing out on this economic potential. Only 3 of Leicestershire's Market Towns have Business Improvement Districts and there could be an opportunity to expand the concept into other towns. BIDs offer a 5 year revenue stream, flexibility, government support and lobbying muscle, local expertise and a focus on results. This gives them a unique ability to innovate and make tangible improvements at a time when local government is struggling to deliver basic services.

Market Towns Digital Project

Free Town Centre Wi-fi

14.6 Acknowledging that this is already being introduced in some towns (e.g. Hinckley), it is vital to establish free wi-fi networks across all market towns. Consumer expectations appear to be rising in this regard, with wi-fi access regarded as a 'must have'. In the short term, this would confer some competitive advantage over towns that do not offer this facility and in the longer term would ensure that Leicestershire is not left behind were competitor towns to follow suit. Discoverability online will lead to increased consumer engagemen . The definition of a clear sense of place needs to be communicated to consumers through numerous channels, where an engaging social media strategy sits alongside high quality public realm spaces with street entertainment and markets. A bustling business district might be served by both good connectivity and a diverse evening and leisure economy offer. These are key objectives Leicestershire's Market Towns need to fulfil. (" The High street Digital Hub "– Clockwork City April 2016).

14.7 Users would be required to register for free wi-fi, enabling towns to build up a database of contacts to whom electronic messages could be sent in a targeted and low cost fashion. The landing page for free wi-fi could be the town website which in turn could be used to identify places of interest to consumers in order to maximise their spending and provide them with a more satisfying visitor experience. This can also be linked to Loyalty Cards to enable retailers to promote particular offers.

Case Study 1
Digital technology is playing an increasingly important role in the way we shop and do business. In particular, the growth of the use of mobile technology continues to outstrip all other forms of marketing and communication. In the UK, 6 out of 10 people now use a mobile device to access the internet, with trends showing that those numbers will increase further. In respect of the Hinckley BID website (www.hinckleybid.co.uk) which attracts in excess of 5,000 visits a month, around 70% of access is via mobile devices.

The public access Wi-Fi in Hinckley provides free public on-line access throughout public spaces to all visitors within the core town centre, to allow them to access the internet. It also enables the BID to gather the basic data of those using the Wi-Fi, allowing it to monitor visitor profiles, frequency of visits etc. This data can then be used by the system to allow the BID team to send messages to visitors via social media, email or SMS (text) - providing details of forthcoming events, promotions or even just to wish regular visitors a 'Happy Birthday.' In the first 12 months the Wi-Fi has attracted more than 4000 registered users all of which can now be contacted through the portal and many of these users have also signed up to follow the BID on its social media platforms, doubling its social media following.

The infrastructure of the wi-fi system provides options to embrace other technologies, such as way find devices and offers cost saving options on systems currently hard wired such as CCTV.

Click and Collect

14.8 Mintel estimated that the value of click-and collect orders grew as much as 42% year on year in 2014, and predicts that in 2015 around 17% of internet retail sales will be collected in-store. New 'click & collect' partnerships (like John Lewis' Collect+ scheme or House of Fraser's multichannel pilot scheme with Cafè Nero as a collecting hub) are an indication that innovative partnerships and the use of 'shared spaces' on the high street have the potential to enhance vitality, and give the increasingly time-poor and convenience-seeking consumer more reasons to visit the town centre.

14.9 These facilities already exist in many of the market towns and are a way of deriving some benefit from the shift towards on-line retail. Going into a town centre to collect goods might lead to some consumers purchasing other items (albeit many will be focused solely on collecting their on-line purchase). Those towns without a click and collect ought to establish one. In all cases, towns might consider schemes whereby incentives (shop discount vouchers, free parking?) are offered to extend dwell times.

Market Towns Quality Enhancement Project

Improving the Townscape

14.10 Visual appearance is considered key to town attractiveness. The "In Bloom" projects are viewed positively by all the towns and beneficial to those involved. In Bloom competitions have environmental and social judging criteria, therefore these groups could be used as a route/partner for some LEP (un)employment projects.

14.11 Similarly, some towns have operated shop front improvement schemes, but consultations with groups of businesses suggested low levels of awareness where they existed. A Leicestershire-wide scheme might offer working efficiencies, consistency of approach and greater awareness/clarity since a number of schemes have previously been delivered, from which experience can be drawn. Many towns are in the process of applying for Heritage Lottery Funding, so again consistency of approach would be helpful.

14.12 The quality of public space is variable, albeit generally improving in most places. Nevertheless, there is scope for more and better quality street furniture (seating, litter bins and signage not least). Given the amount of funding cuts to local authorities, it is unlikely that funding will be available to carry out public realm schemes, unless they can be linked to wider regeneration schemes for the whole of the town centre, hence the importance of this study to demonstrate the importance of the appearance of the public spaces.

14.13 Derelict buildings and vacant buildings can be an eyesore and serve to depress confidence, being seen as a sign of failure. There are good examples elsewhere of derelict buildings being dressed/camouflaged to improve their appearance (or at least minimise their negative impact) and a number of towns such as Loughborough use vinyl stickers to dress empty shop units. Vacant buildings might be suitable for pop up shops, giving retailers (including designer/makers) new (lower risk) opportunities, giving consumers more choices and breathing new life into empty premises.

Case Study 2

ERDF monies were received for the public realm schemes in both Oadby and Wigston town centres. This was justified on the grounds of the boost to the local economy through inward investment, commercial developments and increased footfall that new public realm schemes would generate. An £830,000 scheme included new paving, raised tables to enable streets to be used for events, new bus shelters, litter bins and seating to create a modern streetscene more in keeping with the 1960's architecture in both centres rather than the traditional street furniture previously used. The new paved area in Oadby has already been utilised for more events including a classic car show. The funding for the scheme was a partnership between Oadby and Wigston Borough Council and Leicestershire County Council.

Public Art

14.14 Whether permanent or temporary, public art can play an important role in helping to convey the image of a town and attract visitors. Public art trails have been used to good effect to attract and retain visitors. In almost all cases, Leicestershire's market towns exhibit a complete absence of public art – Shepshed has some small examples of public art in Kirkgate and can be a good way of involving Community Groups in the Town Centre via the design of the art as a means of giving people interesting things to look at and/or which can form a pleasant backdrop to shopping/leisure experiences.

Case Study 3
Appropriate and well considered investment in public art has been shown to generate visitor interest, leading to greater expenditure and thereby supporting employment. For example, the economic impact assessment of The Angel of the North demonstrated the value to the local economy in terms of its role as a visitor attraction and as a symbol of regeneration, helping to attract further public and private sector investment. Benefits ranged from a nearby pub becoming a hotel and investing in the development of a new accommodation block to businesses reporting that levels of recognition had increased markedly through association with a local landmark that has become famous internationally.

Market Towns Regeneration Project

Key Sites Officer and Fund

14.15 In a number of towns there are notable and longstanding derelict buildings/sites which are blighting the townscape as well as representing unrealised assets for the town. In many cases contacting or even identifying owners is reported to have proven very difficult if not impossible. Furthermore, the closure of a number of Co-operative stores (in Coalville, Hinckley, Melton and Wigston) and rumoured threats to a number of other stores in some towns suggests this problem is likely to become even worse.

14.16 In respect of the multiple retailers in particular, there would appear to be considerable merit in having a single individual representing the interests of Leicestershire's market towns. This would offer scope for better co-ordination, more cost-effective use of officer time and, prospectively, more meaningful engagement (with property owners only having to deal with one person in order to cover a number of sites).

14.17 More generally, having a dedicated resource and one which offers property-specific expertise would appear more likely that substantive progress on these issues is achieved. By employing an officer to work across several towns/sites this would be affordable and economies of scale would be achieved.

14.18 The main aim of the Key Sites Officer would be to bring abandoned properties/sites back into productive use. In some cases, this might involve supporting owners to bring forward their own re-development schemes and in some cases facilitating the sale of sites to new owners. In either context, a key sites officer could play an important role in promoting and providing ready access to JESSICA funds. Indeed, there may well be merit in allocating dedicated (and significant funding) as pump priming for schemes in the form of a Key Sites Fund.

Pop Up Shops

14.19 There may be scope for partnerships with local colleges to provide pop up shop/market stall opportunities to students in fashion, crafts, jewellery, food & drink etc. Melton Mowbray for example has previously used empty properties as Art Galleries and created a street trail.

Town Centre Enterprise Zones

14.20 Business rates are a major component of operating costs for town centre occupiers. Whilst retailers may not be able to benefit directly, the creation of Town Centre Enterprise Zones could help to attract non-retail businesses, bringing new vitality, people and spending power into town centres. The last round of Enterprise Zone bids encouraged rural applications and multi-site bids. If the next round adopts a similar approach, there would be considerable merit in a market towns bid covering multiple locations.

Town Centre Investment Model

14.21 The Town Centre Investment Model pilot in Melton Mowbray (and nationally) has demonstrated the merit in active management of a critical mass of properties in key parts of a town centre. This approach sees a change of role for town centres from being purely retail focused to becoming social, cultural and experience led centres, engines of economic growth and the location for new and exciting residential living. This is a radical approach which could involve the local authority playing a leading role in site assembly, possibly using its CPO powers and acting as a funder.

Gateways

14.22 The means by which town centres are accessed give rise to a variety of experiences. In some cases, there is a definite sense of arrival, whilst in others it is unclear as to whether or not the heart of the town centre has been reached. Consistent with the development of a brand and creation of a sense of place, there is scope in many towns to undertake work at key gateways to enhance the visitor experience. This again demonstrates the need for a key sites officer to work on these projects.

Revitalisation of Markets

14.23 It is apparent that there is a need to breathe new life into traditional markets. This element of the project would establish a county-wide programme to identify and implement bespoke interventions which improve market success factors e.g. location, style, business model. It might also incorporate a touring market programme across all towns (perhaps with a themes, such as food and drink). The intervention is likely to involve a single post, liaising with local market managers and performing this role where no local manager exists. Many markets are being run as private enterprises including Market Harborough and other towns need to explore this option.

Market Towns Business Support Project

14.24 Whilst it is acknowledged that some businesses are run to suit lifestyles rather than maximise income, there would appear to be scope to encourage a review of business practices. For example, by modern standards, some opening hours are bizarre (including early afternoon/Saturday afternoon closing). That is even before the notion of early evening opening is explored. The stark reality is that consumers want convenience and retailers/service providers need to respond accordingly. Therefore, there may be merit in a Business Support Project for the retail and hospitality sectors around: adapting to digital, getting customer feedback, understanding your market etc. Some towns such as Loughborough have already utilised companies such as Kerrching to carry out mystery shopper trips and business appraisals with good success

14.25 Indeed, wider evidence suggests that we are moving towards a phase in which the distinction between the online and offline world is becoming increasingly blurred, and whilst the big stores (not least through click and collect operations) have responded to this, there is a need to ensure that independents are digitally literate/using social media. In Hinckley only 25 % of businesses have a web-site or carry out on-line sales.

14.26 LLEP has a newly established Business Gateway, providing a single conduit for business support. Retail as a sector has always been excluded from applying for funding under such initiatives. Some individual towns have utilised local companies such as Kerrching to carry out healthchecks and mystery shopper visits, but a County-wide scheme could prove to be very beneficial. Loughborough offers a package of support to new businesses wishing to re-locate and others such as Melton Mowbray offer start up grants.

Market Towns Promotional Project

Brand Development

14.27 Many of the market towns appear to have something of an identity crisis. It is unclear as to what functions they perform or indeed what kind of towns they want to be. In each case there is a need for a clear vision, an agreed strategy and an action plan to deliver that vision. This process should also enable each town to achieve clarity as to its functions and aspirations which in turn would lead to the emergence of an identity/its niche as the basis for brand development.

Festivals and Events

14.28 Town centre businesses crave footfall and festivals and events have the potential to deliver this. Some towns already operate a pretty full programme of activities but there is a need to engage and involve businesses more effectively to enable them to get more out of the events in terms of sales. Other towns with no town centre focussed organisation carry out little or nothing in relation to festivals and events. There is an opportunity to involve community groups to carry out events utilising the town centre space to create vibrancy and drive footfall.

14.29 There is scope to organise a programme of activities within each town and involving multiple towns. This might most efficiently be undertaken by a festival/events co-ordinator operating across the County and establishing working relationships with all relevant parties (including the Police, highways authorities etc.).

14.30 Alternatively, there would be merit in creating an information pack for relevant officers within local organisations providing them with a guide to the organisation of different types of events. However, this would not address the issue of capacity, build up expertise in event organisation nor cultivate effective working relationships with key bodies.

Case Study 4
Utilising funding from East Midlands Development Agency (emda) a series of events was rolled out across 10 Leicestershire Towns: Leicestershire by the Sea, followed by Jurassic Leicestershire then in the final year Pirates of Leicestershire. These all involved putting giant sandpits into the town centre and carrying out associated activities. Some events were one day others lasted a week. Leicestershire County Council purchased the initial infrastructure of sandpits, deckchairs, safety mats, buckets and spades etc. Utilising Highway Department within LCC this then moved around the towns and it was then up to each town if they carried out street trails, window dressing competitions or associated activities. By sharing infrastructure costs, risk assessments etc. and carrying out joint marketing activities, this substantially reduced costs. The infrastructure was then passed to one of the towns to co-ordinate once the funding ran out and the sandpits still exist today.

Improve Online Presence of Towns

14.31 Each town ought to have a dedicated promotional website, each linked to the others. This should be separate from district/borough and town council websites. There would be merit in sourcing these from a single supplier in order to achieve consistency in design and functionality as well as to minimise costs.

14.32 Websites could promote each town generally as well specific retail/leisure/hospitality offers. In doing so, this would highlight to consumers what the town has to offer and to other service providers possible gaps in the market, which may help to encourage new investment. These websites need to be linked to the Destination Management Organisation (Leicestershire Promotions Limited, LPL) to utilise the town centres as linked trips relating to tourism.

14.33 Linked to free wi-fi (see below), websites could be the landing page for town centre visitors accessing free wi-fi. Linked to a town app, the website could also offer visitors information on where to go to shop, eat, drink etc. based on their stated preferences.

Case Study 5
The Love Loughborough website was put in place once the BID had established the brand. An early campaign (Love Loughborough's Summer Love Bus) sought to promote: bus travel as a mode of transport into the Town Centre; Loughborough as a destination for shopping and leisure during school holidays; and Love Loughborough's Loyalty Card and participating BID businesses. The results included an increase in daily website visits of more than 50 per cent

In its first full month of use (May 2012- the website attracted 773 visitors. In May 2013 it attracted 3,936 visitors and this rose further to 6,423 visitors in May 2014 and 8,107 visitors in May 2015. The website, alongside other promotional campaigns, has promoted the Loyalty Card which has grown from nothing in 2012 to 13,000 now.

Showcasing Local Products/Produce

14.34 This could both give due recognition to the industrial heritage of the towns - Earl Shilton and Barwell had shoe factories, and Hinckley hosiery, for example – and help bring forward a new generation of designers/makers. This could be linked to Creative Leicestershire and could be linked to the re-invigoration of local markets.

Joint Marketing/Independents

14.35 Possibly linked to the above, there is scope to do more to harness the collective power and appeal of independent retailers and service providers. Independents are struggling to compete on cost when compared to the internet or bargain/£ shops. This suggests a need to identify the added value characteristics of independents/groups of independents and use this as the basis for collective marketing (e.g. locally sourced foods and specialist foods).

Town Trails

14.36 A lower tech alternative or complementary approach to the above would be to establish and promote town trails. This could take a number of forms:

- Town centre maps (or even interactive screens) positioned at key points in the town, which could be replicated in promotional leaflets.
- Painted walking routes leading people to particular attractions
- Improved signage that could route visitors to particular areas (especially important where shops/services would otherwise be difficult to find).

14.37 There could also be trails that combine visits to several towns. This could exploit common themes (such as food and drink or Heritage) or highlight proximity. Journey times between some towns are relatively short and whereas they might regard themselves as competitors, there may well be scope to develop complementary offers.

Printed Materials

14.38 As alluded to above, there would be merit in publishing leaflets for general distribution, relating both to individual towns and collections of towns. These could prove especially useful in the context of the many (and sizeable) new housing developments. It is essential that those moving into or near market towns are made aware of what is available locally if the potential benefits of the additional spending power they will bring are to be taken advantage of. From a visitor perspective the leaflet could also be digital and linked to the DMO.

14.39 There may be merit/scope to involve local people in putting such materials together (perhaps involving schools, colleges, community groups etc.), which in itself may help to engender a greater sense of local pride.

Business Improvement Districts (BIDs)

14.40 The experience of Hinckley, Loughborough and Melton Mowbray is that there would be merit in establishing BIDs in towns that do not have one currently. This will ensure that each town has a body whose focus is improving the prosperity of the town and increasing footfall and spend. BIDs can also be formed for specific sectors such as Tourism which could be linked to 14.36 and 14.38 above. BIDs offer a 5 year revenue stream, flexibility, government support and lobbying muscle, local expertise and a focus on results. This gives them a unique ability to innovate and make tangible improvements at a time when local government is struggling to deliver basic services.

Media campaigns

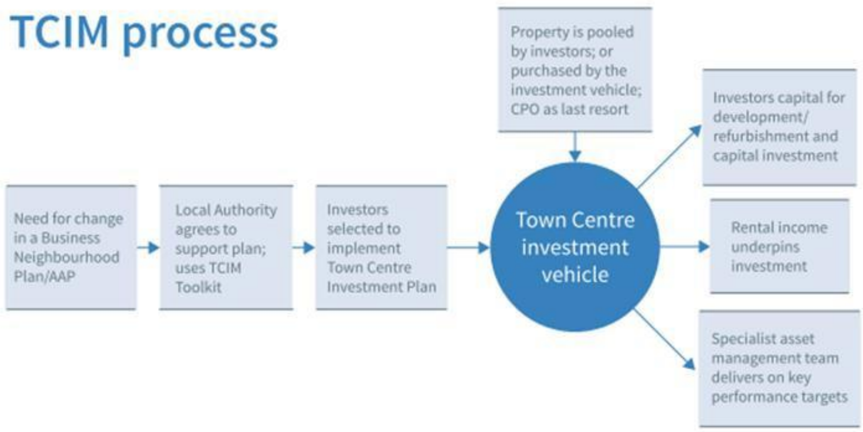
14.41 Whilst traditional advertising is relatively expensive, social media offers a much lower cost alternative. Furthermore, if a number of the above projects come to fruition, this would offer the opportunity to attract significant press coverage.

Project Priorities

14.42 Of the 20 projects listed above, we have selected three below that might be progressed as a priority.

Project: Key Sites Officer/Fund
Background Across the County there are a number of sites/buildings which have been unused or under-utilised for a considerable period, often occupying key locations. Furthermore, the number of such sites/buildings is increasing as retailers (most notably the Co-operative) close outlets.
Evidence The lack of re-development activity (or even proposals) is a clear demonstration that the market has not responded to any potential opportunities. This may be due to lack of awareness of the opportunity, a perception that the risk/reward ratio is unfavourable or knowledge that the risk/reward ratio is unfavourable. In each case local stakeholders recognise the opportunity for re-development to stimulate new economic activity and are aware of the negative impact of redundant buildings on the town centre, being a blight on the townscape and symbolising failure/under-performance.
Rationale The issue pertaining to such buildings/sites often have commonalties and therefore having a single officer with relevant expertise would ensure that issues are tackled effectively and efficiently. Development opportunities could be promoted as a package rather than individually (and prospectively competitively). With cuts to local government funding it is unlikely that each of the seven districts could afford a person with the calibre of skills required and a single person co-ordinating at a county level could have more impact with developers having knowledge of multiple sites. In addition, each District/Borough Council has to liaise separately with the Co-operative (and other owners of multiple sites/properties). This is time consuming and inefficient. Furthermore, it is a responsibility that is a small part of one or more people's jobs; there is no dedicated resource. In order to facilitate development there may be a need for public sector investment to ameliorate developer risk and/or provide access to loan funding.
Basis of Project The project would involve: the appointment of a Key Sites Officer with a high degree of experience/expertise; the creation of a Key Sites Panel; the establishment of a feasibility fund (to explore the business case for re-developing nominated sites and the technical issues related to their re-development); the creation of a development grant fund; and access to loan funding via LLEP's LGF Local Growth Fund Programme.
Timescale and Resources The development process invariably takes a significant length of time and as such the initial phase of the project would need to run for a minimum of three years, and ideally five years. Based on experience elsewhere, the funding needs to be sought from public funding programmes for individual projects as they arise and private sector contributions.
Potential Deliverables The outputs and outcomes would depend on the types of development undertaken and the final uses. Broadly speaking, such a fund might support the creation/accommodation of up to 1,000 jobs (gross).

Project: Town Centre Investment Model
Background The Town Centre Investment Management Pilot in Melton Mowbray was part of a national initiative supported by the Department of Communities and Local Government (DCLG). The programme was managed by a team of project consultants and overseen by a steering group which included institutional investors. The pilot in Melton undertook a partnership approach involving Melton Borough Council, Melton BID, Melton Town Estate and Leicestershire County Council. For all its attributes, Melton Mowbray was seen as lacking the key attractors and anchor retailers that drive footfall, increase dwell time and spend levels. The pilot was also about a change of role for the town centre from being purely retail focused to becoming cultural, leisure and social experience-led centres, engines of economic growth and the location for new residential living.
Evidence At the heart of this pilot scheme was the design of a model and mechanism to overcome the barrier of fragmented ownership and at the same time create a basis for growth whilst attracting inward investment into town centres. The advice provided and reported indicated that more active management of a critical mass of properties would ensure that an appropriate occupier line up would be achieved, both in terms of the mix of retailers, as well as leisure, employment and residential uses. The investment would provide healthy commercial returns with projected rental yields at between 8-14% per year dependent on the completed scale of intervention over a 10 –15 year term. As an income producing vehicle, it could attract fresh funds and reinvest in the public realm as well as ensuring other public assets and services are maintained in keeping with the desired offer. Furthermore, by providing greater focus and incentive into the tenant mix the area would help to grow and expand the portfolio of local independent businesses whilst also attracting appropriate national brands. Occupation costs can also be influenced to ensure that businesses are given the best opportunity to thrive in the short, medium and long term. The key findings of the pilot concluded that: • From consultations with investment funds including M&G Real Estate, Aviva etc, property companies and asset managers the TCIM model was seen as attractive to institutional investors as well as local funding public-private partnerships involving local authorities; • The recognition that an asset managed approach can add to the value and viability of peripheral areas, including housing and businesses around it; • Specialist asset management skills are critical to delivering performance; • The principles of collective or single ownership can be applied to commercially smaller or less favourable locations, where commercial returns were found to be feasible. • The collective and single ownership and management of a critical mass of properties that can be adapted to meet demand is undoubtedly effective, as evidenced in over 20 case studies reviewed by the pilot; • Localism, BIDS and Neighbourhood Plans are important un building consensus around the need for development and significant structural change in the town centre; and • The need for focus and alignment, e.g. the creation and designation of Town Centre Investment Zones (TCIZ) by working with the LLEP was recommended as a way to signal to investors that local leadership, services and initiatives are aligned through a clear prospectus for investment and vision for development, underpinned by a master plan, area action plan or Neighbourhood Plan that is endorsed by local communities and businesses

Rationale As towns grow, many through a series of urban extensions, there is a greater imperative to intensify the offer within a town centre, to increase their residential and employment base as well as the social, cultural and leisure offer to create a network of streets and spaces of which local communities and businesses can be proud. Fragmented ownership was identified as a real barrier to this this type of growth, particularly where short-termism is encouraged through a focus on immediate returns and investment outcomes without regard for wider impacts or longer term implications linked to the profile and reputation of the town. Hence the Pilot adopted an approach that sought to remove/lower this barrier and address market failures whilst at the same time create a platform for sustainable growth and inward investment. Most importantly, town centre retail is contracting at a time when an investment deficit is occurring in the built environment, in this instance fragmented ownership can further compound or even prevent adaptation and can pose significant risks to economic growth.
Basis of Project  A need for change is identified by local stakeholders including local businesses and the local community through, for example, a Neighbourhood Plan. The Council can take a facilitative role supporting the production of an Investment Plan or Prospectus as well as undertaking a more direct investment interest. Early stage funding would be needed to support the set up costs of the vehicle (including legal and procurement estimated at £200,000) and potentially gap funding with land assembly and intervention costs. Expert asset managers would deliver the active management of a critical mass of around 40 properties. Positive ROI can be achieved at varying scales by purchasing and/or pooling assets into an investment entity or joint venture vehicle (e.g. Real Estate Investment Trust). This would enable stock to be adapted to meet demand, the mix of occupiers to be curated and the destination to be more effectively marketed. The pilot study indicated that a sub-regional fund covering multiple market towns may be more appealing and offer greater returns to institutional investors, further work would be needed to test the investment opportunity.
Timescale and Resources Resources: £50,000 pilot funding, provided by Melton Borough Council, Leicestershire County Council, Melton BID, Melton Mowbray Town Estate Timescale: April 2015-March 2016
Potential Deliverables Information has been provided on what the Pilot delivered but this is commercially sensitive and cannot be included in this document.

Project: Free Town Centre Wi-fi
Background Consumer expectations are now such that wi-fi access is regarded as a 'must have'. In the short term, this would confer some competitive advantage over towns that don't offer this facility and in the longer term would ensure that Leicestershire is not left behind were competitor towns to follow suit.
Evidence In the UK, 6 out of 10 people now use a mobile device to access the internet, with trends showing that those numbers will increase further. In respect of the Hinckley BID website (www.hinckleybid.co.uk) which attracts in excess of 5,000 visits a month, around 70% of access is via mobile devices. The public access Wi-Fi in Hinckley provides free public on-line access throughout public spaces to all visitors within the core town centre, to allow them to access the internet. It also enables the BID to gather the basic data of those using the Wi-Fi, allowing it to monitor visitor profiles, frequency of visits etc. This data can then be used by the system to allow the BID team to send messages to visitors via social media, email or SMS (text).
Rationale Whilst some multiples (most notably cafés) offer free wi-fi, most town centres as a whole do not and there is no indication of the private sector stepping in, given there is little or no prospect of a sufficient return on the required investment. The Connected customer requires content that is engaging and most importantly continually refreshed. It is not enough to just install wi-fi , apps or set up social media accounts "story tellers are required to make best use of the digital tool box to sell the place and well as showing SME's how they can contribute to creating the sense of place.
Basis of Project Users would be required to register for free wi-fi, enabling towns to build up a database of contacts to whom electronic messages could be sent in a targeted and low cost fashion. The landing page for free wi-fi could be the town website which in turn could be used to identify places of interest to consumers in order to maximise their spending and provide them with a more satisfying visitor experience.
Timescale and Resources Initial costs to install the Wi-Fi in the case of Hinckley was £30,000 and then £7000 per annum running costs. Installation costs are obviously dependant on the number of transmitters required to cover the town centre. There is evidence that the private sector is willing to invest in free wi-fi – Leicester City centre recently put out a tender for a provider and BT are fulfilling this – what Leicester haven't achieved as part of this package is the data collected, when someone logs into the system and hence its use as a Marketing Tool.
Potential Deliverables In the first 12 months free Wi-fi in Hinckley town centre attracted more than 4,000 registered users all of which can now be contacted through the portal and many of these users have also signed up to follow the BID on its social media platforms, doubling its social media following.

APPENDIX 1: FOCUS GROUP DISCUSSION PARTICIPANTS

Focus Group Participants			
	Stakeholders	Businesses	Total
Ashby	3	11	14
Blaby	2	11	13
Coalville	6	16	22
Earl Shilton & Barwell	6	6	12
Hinckley	4	22	26
Loughborough	16	8	24
Lutterworth	3	2	5
Market Harborough	4	5	9
Melton Mowbray	5	9	14
Shepshed	14	12	26
Wigston	2	7	9
Total	65	109	174
Source: ERS			

APPENDIX 2: TOWN CENTRE CENSUS OUTPUT AREA

Town centre areas were defined at 2011 Census Output area in consultation with each District Council.

Town Centre boundaries were first provided by District Councils. These boundaries were then mapped against Census Output Areas to facilitate the collection of Census 2011 data for each town.

Each output area contains a 'Population Centroid' which shows the centre of the population in an Output Area. Where a centroid fell within the town centre boundary the Output Area was included in the analysis. Exceptions to this process were Lutterworth and Wigston. In both cases, in the absence of any centroid being located within the town centre, the Output Area with the centroid located closest to the town centre boundary was included.

Using this process the following Output Areas were included in the analysis.

Town Centre: Census Output Area:		
Local Authority	Output Area	Market Town
North West Leicestershire	E00131513	Ashby de la Zouch
North West Leicestershire	E00131518	Ashby de la Zouch
North West Leicestershire	E00131524	Ashby de la Zouch
North West Leicestershire	E00131542	Ashby de la Zouch
Hinckley and Bosworth	E00131035	Barwell
Hinckley and Bosworth	E00131038	Barwell
Hinckley and Bosworth	E00131039	Barwell
Blaby	E00130192	Blaby
Blaby	E00130195	Blaby
North West Leicestershire	E00131588	Coalville
Hinckley and Bosworth	E00131128	Earl Shilton / Barwell
Hinckley and Bosworth	E00131035	Earl Shilton / Barwell
Hinckley and Bosworth	E00131038	Earl Shilton / Barwell
Hinckley and Bosworth	E00131039	Earl Shilton / Barwell
Hinckley and Bosworth	E00131173	Hinckley
Charnwood	E00130502	Loughborough Town Centre
Charnwood	E00173305	Loughborough Town Centre
Charnwood	E00173306	Loughborough Town Centre
Harborough	E00130867	Lutterworth
Harborough	E00130901	Market Harborough Town Centre
Melton	E00131473	Melton Mowbray
Charnwood	E00130625	Shepshed
Oadby and Wigston	E00131951	Wigston

APPENDIX 3: TOWN CENTRE WORKPLACE ZONE

Town Centre boundaries were first provided by District/Borough Councils and then mapped against Census Workplace Zones (as opposed to areas) to facilitate the collection of Census 2011 data for each town.

Each Workplace Zone area contains a 'Population Centroid' which shows the centre of the population in Workplace Zone. Where a centroid fell within the town centre boundary the Workplace Zone was included in the analysis. An exception to this process relates to Barwell where, in the absence of any centroid being located within the town centre, the Workplace Zone with the centroid located closest to the town centre boundary was included.

Using this process, the following Workplace Zone were included in the analysis.

Town Centre: Census Workplace Zone:		
Local Authority	Workplace Zone Area	Market Town
North West Leicestershire	E33014385	Ashby de la Zouch
North West Leicestershire	E33014386	Ashby de la Zouch
North West Leicestershire	E33014387	Ashby de la Zouch
North West Leicestershire	E33014389	Ashby de la Zouch
North West Leicestershire	E33014390	Ashby de la Zouch
North West Leicestershire	E33014391	Ashby de la Zouch
North West Leicestershire	E33014386	Ashby de la Zouch
Hinckley and Bosworth	E33016454	Barwell
Blaby	E33016243	Blaby
North West Leicestershire	E33014406	Coalville
North West Leicestershire	E33014407	Coalville
North West Leicestershire	E33014410	Coalville
North West Leicestershire	E33014411	Coalville
North West Leicestershire	E33014413	Coalville
North West Leicestershire	E33014414	Coalville
North West Leicestershire	E33014415	Coalville
Hinckley and Bosworth	E33016453	Earl Shilton / Barwell
Hinckley and Bosworth	E33014361	Hinckley
Hinckley and Bosworth	E33014362	Hinckley
Hinckley and Bosworth	E33014363	Hinckley
Hinckley and Bosworth	E33014364	Hinckley
Hinckley and Bosworth	E33014365	Hinckley
Hinckley and Bosworth	E33014368	Hinckley
Hinckley and Bosworth	E33014369	Hinckley
Hinckley and Bosworth	E33014373	Hinckley
Charnwood	E33014308	Loughborough Town Centre
Charnwood	E33014325	Loughborough Town Centre
Charnwood	E33014326	Loughborough Town Centre
Charnwood	E33014327	Loughborough Town Centre
Charnwood	E33014328	Loughborough Town Centre

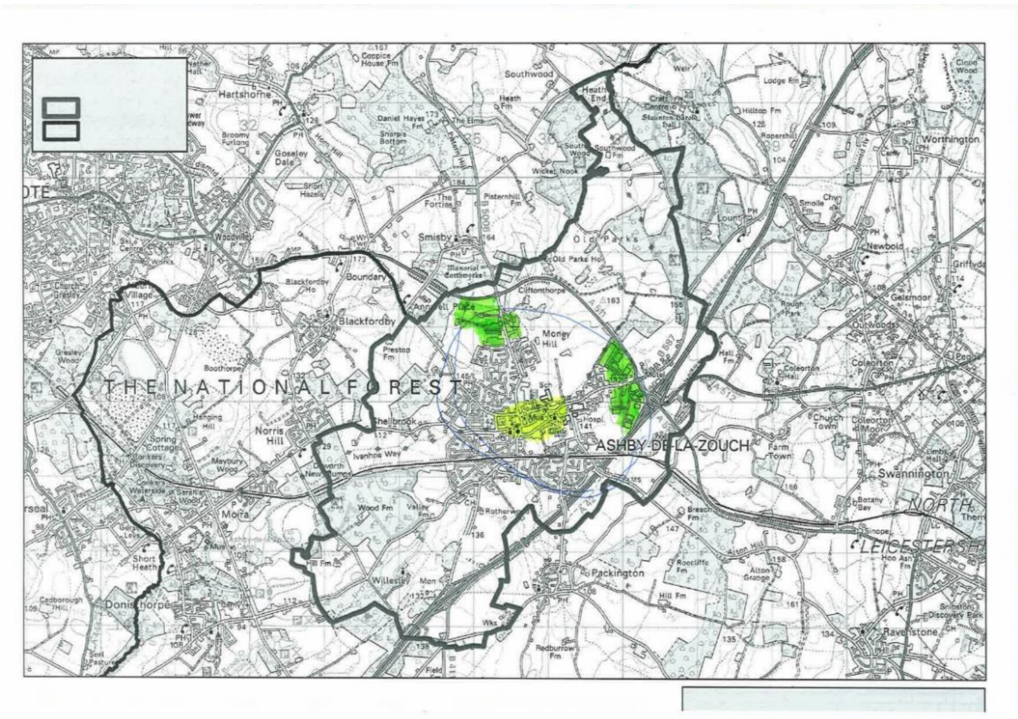
Town Centre: Census Workplace Zone:		
Local Authority	Workplace Zone Area	Market Town
Charnwood	E33014329	Loughborough Town Centre
Charnwood	E33015147	Loughborough Town Centre
Charnwood	E33015148	Loughborough Town Centre
Charnwood	E33015149	Loughborough Town Centre
Charnwood	E33015150	Loughborough Town Centre
Charnwood	E33016273	Loughborough Town Centre
Harborough	E33014339	Lutterworth
Harborough	E33014341	Lutterworth
Harborough	E33014342	Lutterworth
Harborough	E33014345	Market Harborough Town Centre
Harborough	E33014346	Market Harborough Town Centre
Harborough	E33014347	Market Harborough Town Centre
Harborough	E33014351	Market Harborough Town Centre
Harborough	E33014352	Market Harborough Town Centre
Harborough	E33014353	Market Harborough Town Centre
Harborough	E33014354	Market Harborough Town Centre
Melton	E33014370	Melton Mowbray
Melton	E33014371	Melton Mowbray
Melton	E33014372	Melton Mowbray
Melton	E33014373	Melton Mowbray
Melton	E33014379	Melton Mowbray
Melton	E33014382	Melton Mowbray
Melton	E33016512	Melton Mowbray
Charnwood	E33016284	Shepshed
Oadby and Wigston	E33014437	Wigston
Oadby and Wigston	E33014440	Wigston

APPENDIX 4: TOWN CENTRE MAPS

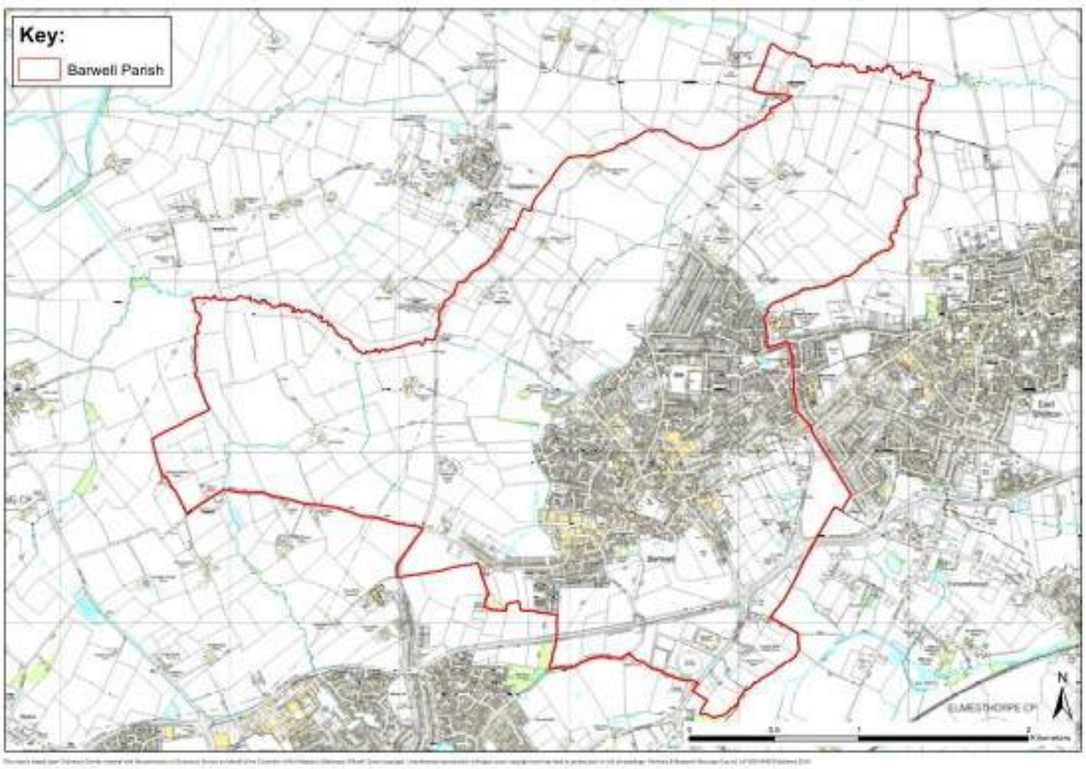
The maps on the following pages do not relate to the definitions in either Appendix 2 or Appendix 3, but have been supplied by the respective Borough/District Councils as representations of functional town centres rather than those defined according to statistical boundaries.

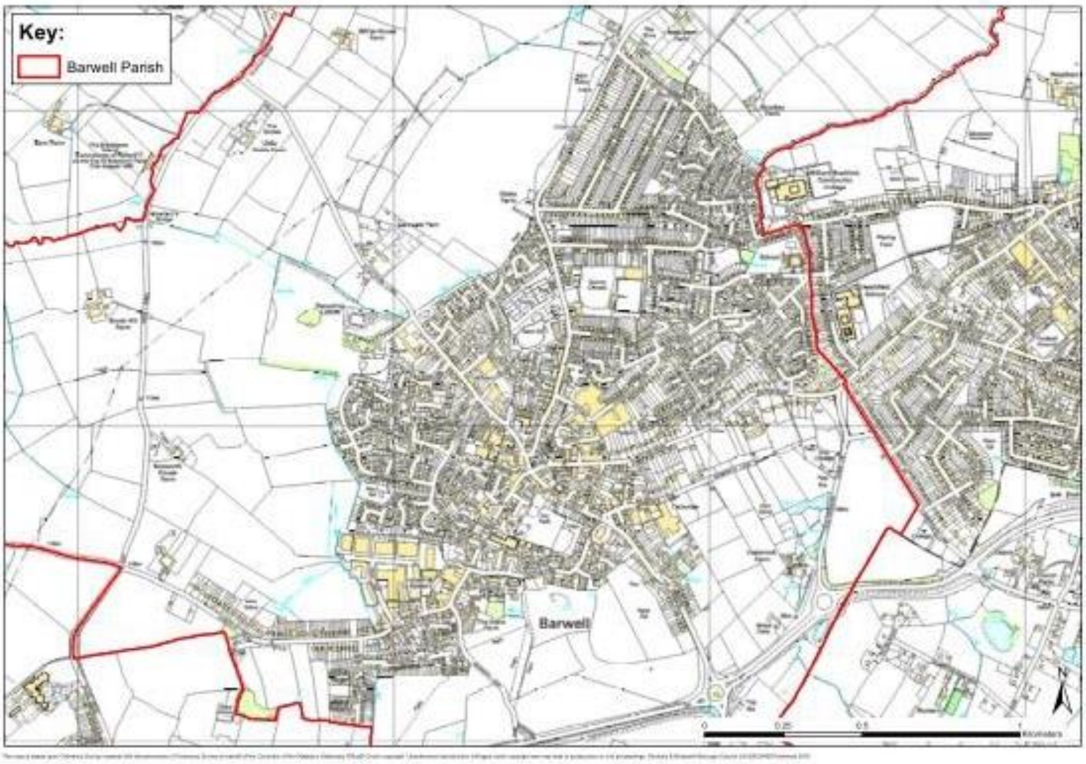
Coalville

Ashby



Barwell

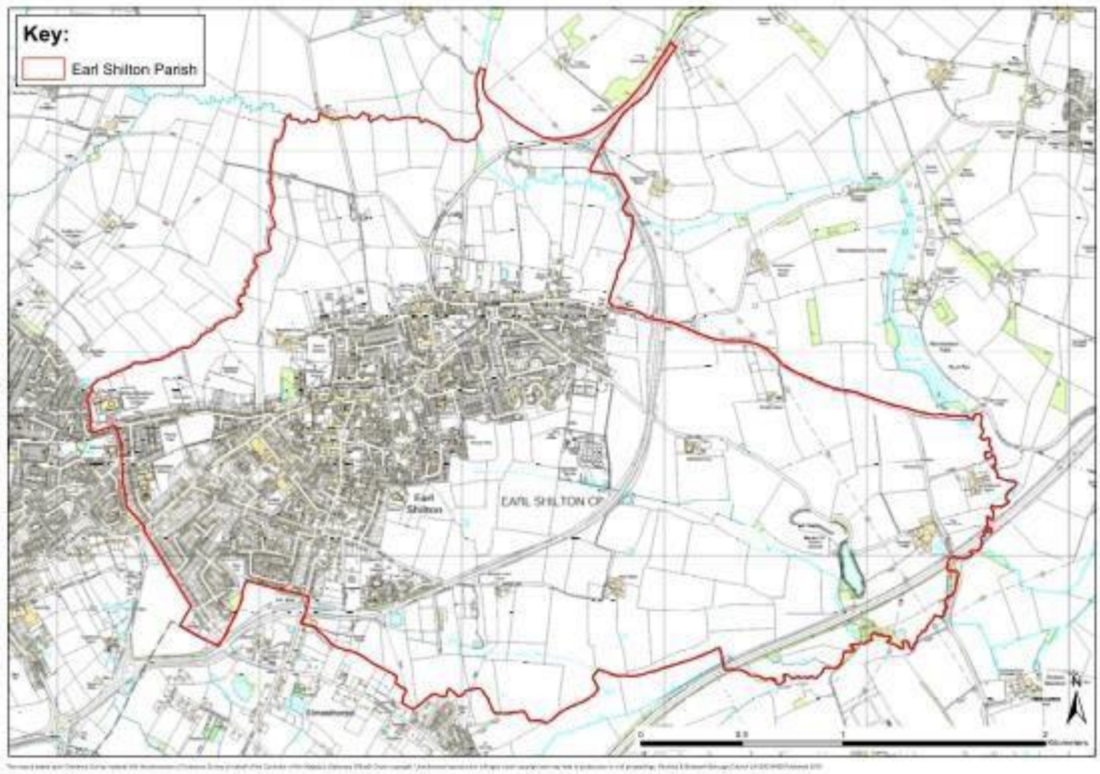

Key:
Barwell Parish
Barwell
ELMESTHORPE CP
N
Kilometres

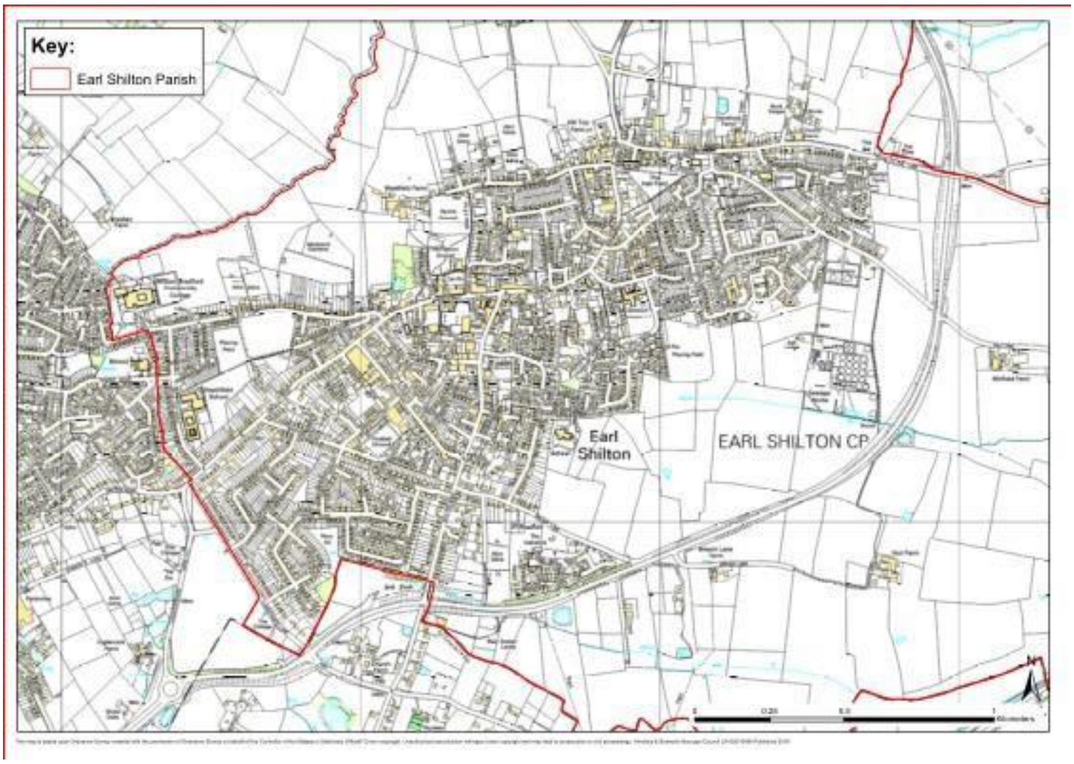

Key:
Barwell Parish
Barwell
N
Kilometres

Blaby

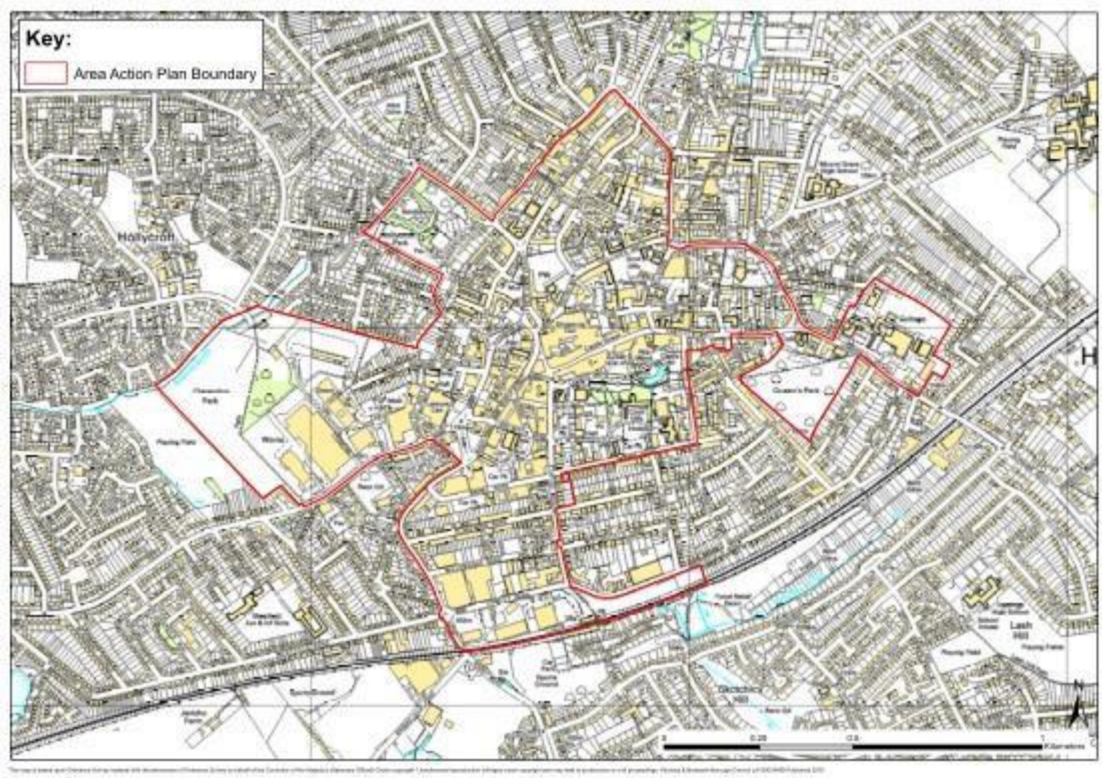

This map is reproduced from Ordnance Survey material with the permission of Ordnance Survey on behalf of the Controller of Her Majesty's Stationery Office (C) Crown copyright. Unauthorised reproduction infringes Crown copyright and may lead to prosecution or civil proceedings.
BLABY DISTRICT COUNCIL
Appendix A - Blaby Town Centre Masterplan Study Area
O. S. Map Ref. :- SP5697
Date :- 12 January 2007
Scale :- 1:5000
N

Earl Shilton

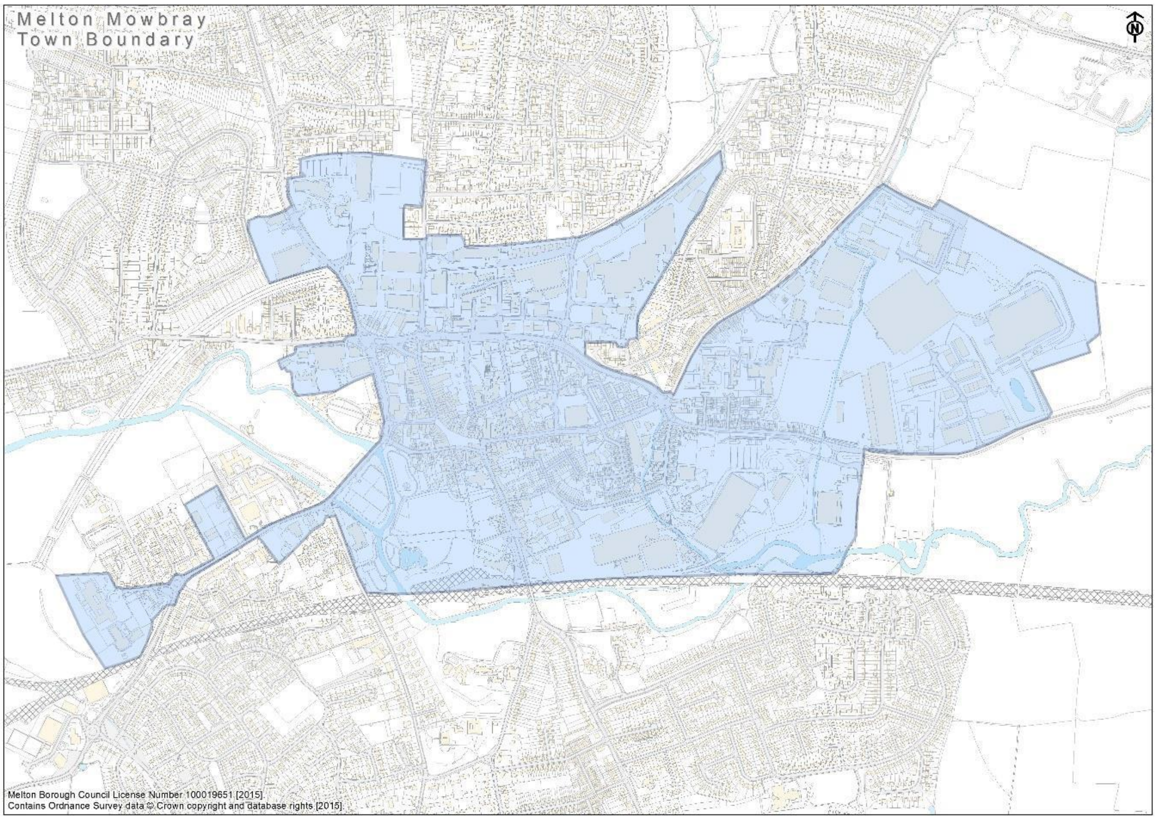




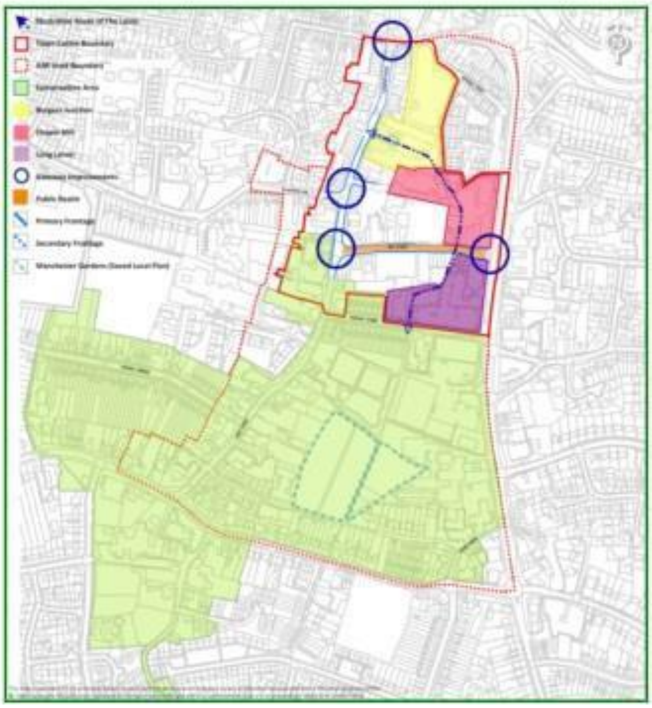
Hinckley



Melton Mowbray



Wigston



APPENDIX 5: PROJECT PROFORMAS

ASHBHY-DE-LA-ZOUCH

Ashby - Current Projects						
Project Name	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Ashby Life	Private – Ashby Life Ltd?		Free local newspaper – forthcoming events, social media		None required as revenue raised through advertising space	

Ashby - Potential Projects							
Project Name	**Strategic Links**	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Shop Front Scheme	**SEP**: Business; **SGP**: Food and Drink Manufacturing; Tourism and Hospitality	Ashby Town Council/NWLDC	Conserve, enhance and upgrade design and character of shop fronts	Upgrade /replace existing windows, doors, lighting, signage and upper floors		None secured – Heritage Lottery	Ongoing
Ashby Open Space plan	SEP: Place SGP: Tourism and Hospitality	Ashby Town Council/NWLDC	76 acres public space – needs comprehensive plan/strategy make better use space including from tourism angle	Feasibility study required		None secured- potential land fill tax Veolia and Biffa.	
Ashby Tourism Branding	SEP: Place SGP: Tourism and Hospitality	National Forest, Town Council, District Council, English Heritage	Make better use Towns offer, including Castle	Signage, Literature , web-site etc, town trail		None secured- National Forest	

Ashby Train Station, reopening of Leicester to Burton Railway line	SEP: Place SGP: Tourism and Hospitality	Network Rail, Ashby Town Council, NWLDC, LCC	To improve rail connectivity	Feasibility Study carried out		None secured – Network Rail and Infrastructure grant through LLEP LGF grants	
Develop capacity and support for Ashby Town Traders	SEP: Business SGP: Tourism and Hospitality	Private sector	Expand business community; improve business communication; formal platform.	Website for offers, local news, events, etc.		None needed traders need to have appetite to form a Town Centre partnership or secure a BID	
Investor Prospectus	SEP: Business, Place	Public sector	Establish greater business culture and create diversity of employment	Business marketing campaign and support		None secured- link to ERDF bid led by City / County for Inward investment	

BLABY

Blaby - Current Projects						
Project Name	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Town Centre Partnership	Blaby District Council	Develop a partnership of relevant stakeholders to ensure the development of the town centre	Develop actions plan, based on consultations			Partnership established
Inclusive Play Area	Blaby Parish Council	Provide public green space, something different	Develop an inclusive play area		Secured from Big Lottery Fund (£50k)	Completed
Blaby Festival	Blaby Parish Council	Increase number of activities in the centre	Affordable entertainment			Being delivered

Blaby – Potential Projects							
Project Name	**Strategic Links**	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Shop Front Scheme	SEP: Business SGP: Food and Drink Manufacturing; Tourism and Hospitality	Blaby DC	Conserve, enhance and upgrade design and character of shop fronts	Upgrade /replace existing windows, doors, lighting, signage and upper floors		None secured	
British Legion site	SEP: Business; Place ESIF: Employment	Private/public partnership	Development of car park, relocation of British Legion	New courtyard with A3/retail and office above		None secured - needs someone to work with site owners to attract developers	

Johns Court	SEP: Business; Place SGP: Hospitality and Tourism ESIF: Employment	Public/private partnership	New retail and leisure development, plus extend/enhance Waitrose store	new courtyard shops , library and community centre.		None secured – needs someone to negotiate with Waitrose and other landowners to determine their aspirations	
Bouskell Park Entrance	SEP: Place SGP: Tourism and Hospitality	BDC/Blaby Parish Council	Enhance attractiveness of park	New entrance, signage, sculpture trail , restoration ice house , visitor centre and exhibition		None secured	
Public Realm improvements	SEP: Place SGP: Tourism and Hospitality	BDC,BPC, LCC	Improve appearance and functionality of the town centre	Raised table at Cross St junction to create space public events, new pavements, street furniture		None secured	
Farmers Market	SGP: Food and Drink Manufacturing; Tourism and Hospitality ESIF: Rural Activities	BDC, Traders	Re-invigorate the market by attracting more footfall	Improve and promote more effectively		None secured	
Renovation of Blaby Hall	SEP: Business; Place ESIF: Employment	Private/Public	Bring vacant property back into productive use	Opportunity to develop commercial or business space		None secured - feasibility study required to understand future options	

COALVILLE

Coalville - Current Projects						
Project Name	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Coalville Project ("Building confidence in Coalville"):						
Coalville Conservation Area	NWLDC	Designated area of town centre is now a conservation area	Protecting building and industrial heritage			Ongoing
Coalville Market Hall	NWLDC	Regenerate indoor Market Hall	Some improvements to lighting, interior design and facilities implanted in recent years. Improvements to management and Market Hall building and its marketing to improve its viability and impact on footfall in the town centre. Study commissioned at start of 2016.		NLWDC funding study.	
Pick and Shovel Pub (now Royal Oak Court)	NWLDC	Demolition of redundant building, replaced affordable housing development	14 new dwelling	2.2million	Approved (HCA / private sector / NLWDC)	Complete.
Shop Front Improvement Scheme	NWLDC	Improve appearance, enhance character and identity within the area	Grants to local shop owners on Hotel/high Street – 50% to 90% of costs, in conservation area		NLWDC / Potential future Heritage Lottery bid	Ongoing
Stenson Square	NWLDC / private sector	Develop Stenson Square (as expressed in Four Squares Investment Plan 2010)	Feasibility study into bestuse of space		NWLDC (may require LCC / LLEP funding to take forward)	Ongoing

Marlborough Square	NWLDC / LLEP / private sector	Improve the look, feel and use of Marlborough Square (as expressed in Four Squares Investment Plan)	Feasibility studies into changes to highways and built environment to achieve goals of "Building confidence in Coalville" project	TBD	NWLDC (may require LCC / LLEP funding to take foward)	Ongoing
Women's Business Network		To support businesses and feed into regeneration			None needed just willingness of businesses to meet.	Ongoing

Coalville – Potential Projects							
Project Name	**Strategic Links**	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Former Ford Garage site	SEP: Business; Place ESIF: Employment	Private sector led	New retail units			Private developer will fund	Planning Permission granted
Four Squares and Streets (public squares project)	SEP: Place SGP: Tourism and Hospitality	Public/private partnership will need to be formed	Improve retail circuit, outdoor seating, and car parking	Various feasibility studies underway to help council decide on shape of future programme and investment needed	TBD	TBD Will involve NWLDC/LCC/ LLEP/other public and private partners	Feasibility studies underway.
Belvoir Centre expansion / redevelopment	SEP: Business; Place SGP: Tourism and Hospitality ESIF: Employment	Private sector led and owned	Increase the retail offer			Private sector	Unlikely to happen as number of long term unfilled units in existing centre

Restoring derelict units/ in fill developments	SEP: Business; Place ESIF: Employment	Public/private	Provide additional retail and commercial space			Will need to be led by a private developer	As and when they occur
Leisure centre in town centre	SEP: Business; Place SGP: Tourism and Hospitality ESIF: Employment	Public	Reinvigorate the town centre and bring in additional footfall			Led by NWLDC in conjunction potentially with a private sector company	
New Stephenson College accommodation	SEP: People; Place	Stephenson College/ other public sector	Increase number of students living and utilising the town.			Dependant on review of Further Education sector later in year	
Our Heritage	SEP: People SGP: Tourism and Hospitality	Public / heritage groups	Celebrate the town's heritage	Physical and virtual archive of pictures, plans and voices, underpinning a community archive, heritage trails and education / engagement activities		Potential Heritage Lottery Fund application /NWLDC/other match funding.	

EARL SHILTON AND BARWELL

Earl Shilton and Barwell - Current Projects						
Project Name	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
SUE	Public levering in private sector investment	Increase the local population and support local and surrounding area	Land assembly Planning orders Development appraisals Site marketing		Private sector led	Long

Earl Shilton and Barwell - Potential Projects							
Project Name	**Strategic Links**	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Public Realm Improvements	SEP: Place SGP: Tourism and Hospitality	HBBC, LCC and Section 106 from both SUEs as mitigation measures	Complete existing project in Earl Shilton – North side Wood Street Barwell – entire village centre			HBBC, LCC and Section 106 from both SUEs as mitigation measures	Determined by SUE timetable
Hardy and Draper site (ES)	SEP: Business; Place ESIF: Employment	Private sector led	New building mixed use – more in keeping with surroundings			Private sector led	
Quality Hotel site (ES)	SEP: Business; Place ESIF: Employment	Private sector led	New buildings mixed use development			Private sector led	
Library/Methodist Church (ES)	SEP: Place; People	Public/private (Initial plans drawn up by Methodist Church)	Key site in centre village potential to act as Community hub			Potential Reaching Communities fund through Big Lottery	Project struggling to progress

Co-Op and its car park (ES)	SEP: Place ESIF: Employment	private	Build new retail units on part under-used car park			Private sector needs lead	
Development site Wood Street and Land Society Lane (ES)	SEP: Place ESIF: Employment	Private	Encourage mixed use develop retail/residential			Private	Development site Wood Street and Land Society Lane (ES)
Constitutional club (B)	SEP: Place ESIF: Employment	Private	New retail development and replacement of club building			Private	Constitutional club (B)
Top Range Motors (B)	SEP: Place ESIF: Employment	private	Mixed use development			Private	Top Range Motors (B)
Co-Op (B)	SEP: Place ESIF: Employment	Private	Residential or office space			Private	Co-Op (B)
6-12 High Street (B)	SEP: Place SGP: Tourism and Hospitality; Professional and Financial ESIF: Employment	Private	Retail leisure or healthcare facilities			private	6-12 High Street (B)

Green infrastructure project	SEP: Place SGP: Tourism and Hospitality	Public and private through S106	Better connectivity between SUEs and town; improved appearance of town centre; more open space for leisure; link the countryside with the town centres	Development of a green space strategy linked to the SUE		Part of S106 agreement with developer	Green infrastructure project
Creation of shared space on Wood Street (ES)	SEP: Place	Public	Traffic calming Better legibility Improved appearance for town centre	Development of highway design		public	Creation of shared space on Wood Street (ES)
Public Art Project (ES)	SEP: Place SGP: Tourism and Hospitality	Public/Private/Education	Create pockets of interest along Wood Street, could link into a town trail	Seek funding Engage artist Work with local schools and colleges to develop designs		Public/private/education	Public Art Project (ES)
Provision of a prime retail site (ES and B)	SEP: Business; Place ESIF: Employment	Public/private	Need the ability to attract a national retailer to the area	Support the growing population as a result of SUE. Need to identify key development sites		HBBC with a developer	Provision of a prime retail site (ES and B)
Shop front improvement Scheme	SEP: Business; Place SGP: Tourism and Hospitality	Public/private	More uniform and attractive shop fronts; to increase trade	50% grants to private businesses to improve their premises		Potential heritage lottery bid	

Gateway project	SEP: Place SGP: Tourism and Hospitality	Public	Designated gateway development to identify the entrance to the towns and showcase it as a destination				
Community web page	SEP: People ESIF: Social Inclusion; Skills development	CVS/Town Council	Raise awareness Promote events and local businesses Possibly include discounts and vouchers	Develop a website or social media page		CVS/Town Council	

HINCKLEY

Hinckley - Current Projects						
Project Name	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Crescent Development	HBBC/Private sector – Tin Hat Partnership	Provide multi-screen cinema, Sainsbury's supermarket, range of larger retail units, family restaurants and Bus interchange	In final stages of occupancy 70% let	£60m	Delivered	First Opening Oct 2015
Leisure Centre Argents Mead	HBBC	Provide new leisure centre and Olympic standard swimming pool on former Council offices site	Final fit out stage	£15.1m	Delivered	Construction started Oct 2014. Due open May 2016
Regent St	HBBC, LCC and Hinckley BID	Re-introduce traffic into area that is part– pedestrianised currently		£75k	HBBC, LCC and Hinckley BID	Work due to commence April 2016
Vicarage retirement complex	Private sector (Mc Carthy and Stone)	Development of retirement accommodation	New development adjacent to new Leisure centre and Crescent Development		Private sector (Mc Carthy and Stone)	Under construction

Hinckley - Potential Projects							
Project Name	**Strategic Links**	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Former Co-Op site Castle Street	SEP: Business; Place ESIF: Employment	Private	Encourage further retail use or Hotel to include former car park			Private sector or public sector prudential borrowing	

Consolidated car park top end of town centre	SEP: Place	Private or public	Create a large public car park at top end of town	Could use land off New Buildings and combine with residential development		HBBC and/or developer	
Former Leisure Centre on Coventry Road	SEP: Place	Currently in public ownership – will encourage private developer	Key gateway site will encourage residential development			HBBC and/or developer	
Britannia Centre	SEP: Place SGP: Tourism and Hospitality	Private ownership	Revitalise dated facilities	Re-fit and extend		Private sector led	
Redevelopment of the railway station site	SEP: Place SGP: Tourism and Hospitality		Bring back into productive use	Deliver transport interchange and improve facilities		Network Rail and/or HBBC and LLEP funding	Determined by funding
Introduce VMS (Variable Measure Signage) for car parks	SEP: Place	HBBC	Improve perception about cap park availability and improve distribution of car capacity.	Install intelligent signage at key junctions with information about capacity and in town centre car parks.		Being considered by HBBC. Would need additional funds from a partner. Potential LLEP funding bid.	Determined by funding
Public Realm Improvements	SEP: Place SGP: Tourism and Hospitality		Improvements to Castle Street, the Market Place Regent Street	Consistency across all areas i.e. signage, shopfronts, etc.		HBBC, LCC and/or LLEP	Determined by funding
Concordia Theatre	SEP: Business, Place ESIF: Employment	Private ownership	Provide new accommodation	Mixed use office and commercial space, public open space and car park		Need to attract a developer	Feasibility study required

Continued support for BID	SEP: Business SGP: All sectors ESIF: Innovation; SME Competitiveness; Employment; Skills Development		Key role in supporting local businesses	More communication about benefit of BID to business (e.g. loyalty card schemes)		Levy from businesses and LCC /HBBC	Next renewal due to 2019
Townscape Heritage Initiative in Town Centre	SEP: Place SGP: Tourism and Hospitality	Public/private	Improved built environment revitalising town centre	Grant application being compiled		A bid to Heritage Lottery Fund by August 2016	
Hansom Cab	SEP: Place SGP: Tourism and Hospitality	Hinckley Museum	Extension to museum to house the restored Hansom Cab	Exploring Heritage Lottery Fund application for an extension to house the restored Hansom Cab. Temporary location also being sought.		Exploring Heritage Lottery Fund application	

LOUGHBOROUGH

Loughborough Current Projects						
Project Name	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Generator project	The Generator CIC (Loughborough University)	To establish a hub for creative design business development and support	Conversion of the former Collage of Art and Design premises obtained on a 25 year peppercorn lease to provide accommodation for up to 60 people engaged in the creative industries together with a membership drop in café / networking / exhibition / event facility	£2.5 million	Application made to HLF for £1.2 million In principle support from LLEP – LLEP Open Call pipeline project	Timetable subject to securing funding
Loughborough University and Enterprise Parks	Public Private Partnership	Centre for knowledge based employment, largest science park in the UK	Provide 4,000 additional jobs through delivery of additional space for innovative business and grow on capacity alongside high tech manufacturing and ancillary facilities over an 85 ha site to the west of Loughborough	Phase II - £21 million (Grow on space, access road and electricity sub station)	Identified as a pipeline project in the LLEP Open Call	Grown on space deliverable by 2019 – wider infrastructure by 2021.

Loughborough Potential Projects							
Project Name	**Strategic Links**	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Town Centre WiFi	SEP: Place SGP: Tourism and Hospitality	Loughborough BID	To improve footfall and enable targeted marketing	Phase I - Installation of WiFi to town centre core area Phase II – Installation of WiFi to extended town centre area	£24,000 capital £2,400 pa revenue £54,000 capital £8,200 pa revenue	LCC / BID partnership To be agreed	Projected commissioning early 2016 Subject to successful deployment of Phase I
Developing a retail circuit/town centre experience	SEP: Place SGP: Tourism and Hospitality	Public	Improvements to and better linkages between the town's commercial/public spaces	Provide clear route for shoppers, signage between retail areas and car parks		LCC/CBC	
Developing an events calendar	SEP: Place SGP: Tourism and Hospitality	Private led	Increase visitor numbers to the centre, increase awareness of activities	Distribute amongst business/residents to promote awareness of activities in the centre		BID/CBC/ Events organisers themselves	On going
Wards End / Devonshire Square public realm	SEP: Place SGP: Tourism and Hospitality	CBC / LCC	To encourage higher footfall and dwell time in order to restore the vitality and commercial viability of the southern area of the town centre	Improve pedestrian safety and comfort through the widening of pavements, rationalisation of road space and improvements to the public realm including a gateway feature	£800k (est)	No capital funding in place – LLEP Open Call pipeline project	

Car parking	SEP: Place	CBC/private	To provide adequate off street car parking to meet projected growth in demand	Provision of a 200 – 300 space multi-storey car park – identified in car parking strategy (December 2016)v	£1.3 - £1.9 excluding land acquisition		
Baxter Gate and Aumberry Gap regeneration site	SEP: Place; Business ESIF: Employment	Private sector	To extend/enhance the range of shops businesses and supporting facilities to sustain and improve Loughborough as a shopping destination including the creation of a gateway feature on the southern entry point to the town centre	Redevelopment of aging commercial properties with a frontage to High Street together with the development of adjacent under used and vacant land (at Aumberry Gap).			A long standing identified opportunity site for redevelopment with phase I (multi screen cinema and restaurant complex) scheduled for completion in May 2016– lines of communication open with the owner of the Aumberry Gap site.
Devonshire Square regeneration site	SEP: Place; Business ESIF: Employment	Private sector	To extend and enhance the range of shops businesses and supporting facilities to sustain and improve Loughborough as a shopping destination	Redevelopment of 1960s commercial units fronting Devonshire Square currently understood to be in receivership to improve the local offer along with connectivity to the Granby Street car park and Queen's Park			Long standing identified opportunity site

Loughborough – Jocklar House regeneration site	SEP: Place; Business ESIF: Employment	Private sector	To secure the redevelopment of a commercial building fronting Swan Street which currently detracts from the quality and character of the	Aspirational objective to enhance town centre offer and improve visual amenities			
Promote a figurehead	SEP: Place; Business SGP: Tourism and Hospitality ESIF: Employment	Private/Public	Face of Loughborough	▪ Attract new investment ▪ Increase footfall ▪ Aid coherent message ▪ Voice of businesses/residents ▪ Oversee activities			

LUTTERWORTH

Lutterworth Current Projects						
Project Name	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**

Lutterworth Potential Projects							
Project Name	**Strategic Link**	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Lutterworth – Pedestrianisation Church St	SEP: Place	Public	In Town centre Masterplan as an option – traders unsure of potential impact				
Former Council buildings	SEP: Place ESIF: Employment	Public – Lutterworth Town Council	Redevelopment of vacant premises for business and/or other town centre use				
Develop the museum offer	SEP: Place SGP: Tourism and Hospitality	Public – Lutterworth Town Council, HDC	To build upon the heritage and cultural offer and increase town centre visitors				
Lutterworth Town Centre Development	SEP: Place ESIF: Employment	Public (Lutterworth Town Council, HDC, LCC, LLEP)	To reduce town centre HGV movement, to support infrastructure for business growth (management, heritage, leisure and business tourism)	Project supporting infrastructure for business growth			

MARKET HARBOROUGH

Market Harborough Current Projects						
Project Name	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Arts Fresco Festival	Harborough District Council, Arts Council England, local businesses	Encourages visitors and increased footfall within the centre	Street theatre and other performances			Annually
Sustainable Harborough	Sustainable Harborough (supported by LCC, RCC, BLF, Environment Agency, etc.)	Inspire people to adapt the way they live/work and connect tougher to reap financial, environmental and health benefits	Retrofitting of water saving devices, recruitment of energy champions, demonstration EcoHouse to monitor energy, community engagement		Big Lottery Fund's Communities Living Sustainably Programme	
Town Transition Market Harborough		Bring together interested parties to work together to the town more sustainable both environmentally and economically	Recent projects include a Community Apple Press, investigating the feasibility of establishing a community owned Energy Supply Cooperative and Sustainable Harborough			

Market Harborough Potential Projects							
Project Name	**Strategic Links**	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Station Improvements	SEP: Place	Public/Private (Network Rail)	Enhanced station facilities	Refurbishment plus lengthening platform		LLEP LGF funding	about to commence
Strategic Development	SEP: Place	Public	Manage traffic movement and develop sustainable solutions to complement growth				
Further Developing the visitor economy	SEP: Place SGP: Tourism and Hospitality, Food and Drink Manufacture ESIF: Rural Activities		Promotional activities, building on the success of the 'Food and Drink Map' and Farmers Market				
Collaboration with Magna Park business community	SEP: People; Business ESIF: Social Inclusion	Public/Private partnership	Better integrate distribution centre into the local economy				
Development of Cultural Quarter	SEP: Place SGP: Tourism and Hospitality	Public/private	Bringing together establishments around Church Square to hold creative events	Refurbishment of Old Grammar School (complete)			

MELTON MOWBRAY

Melton Mowbray Current Projects						
Project Name	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
'Purple Flag' application	MBC, BID, Leicestershire Police, business and organisations within the town	To gain acknowledgement as a town centre that meets/ surpasses the standards of excellence in managing the evening/night time economy	Develop an evening package, including offers for visitors, that supports the evening/ and night time economy	£1500	MBC Secured	In process, application June 2016
Food Enterprise Zone	Defra	To further the Rural Capital of Food brand, local tourism and the food and rural economy of the sub-region. Reinforce all four themes of Melton's Blueprint for Tourism 2015-2018	A flagship Government initiative for economic growth to boost food and farming businesses through benefits like simplified planning, business support and training opportunities.	£50,000	Secured	Approved February 2015
Melton Livestock Market re-development	Melton BC	Secure the livestock & associated markets in the edge of town location for the next 20 years to help retain the unique character and identity of Melton Mowbray as the rural capital of Food & Drink	Construction of new livestock auction building and demolition of dilapidated cattle sheds. Reconfiguration of cattle market to improve traffic flows, site safety & improve potential for intensification of use of the site on none market days. New lease to be granted to Market auctioneers on completion of development	£5.5m	Awaiting final confirmation from LLEP for £3.5m funding from Growth Fund for 2016/17	Project is on target for start in May /June 2016

Melton Mowbray – Brooksby Melton College	Private sector	Development of Brooksby Melton College Site on Asfordby Road, including new provision of training facilities and restaurant				Melton Mowbray – Brooksby Melton College
TCIM pilot study	Public/private LCC, MBC, Melton BID & Melton Mowbray Town Estate	Using the TCIM model and process, it would seek to overcome the barrier of fragmented ownership and create a basis for growth and attracting investment into the town centre.	Actively managing a critical mass of approx. 40 properties by purchasing/ pooling assets into an investment entity or joint venture vehicle that allows the stock to be adapted, the mix of occupiers to be curated and the destination to be more effectively marketed.	£50,000	Secured (LCC, MBC, Melton BID and MMTE)	2015/16
Melton Mowbray – LEADER programme	Public/Private	The LEADER programme seeks to support rural development by providing grants to small businesses and communities.	All projects must support one or more of the LEADER priorities: - Support businesses with less than 50 employees - Support farm diversification - Boost rural tourism - Increase farm productivity - Increase forestry productivity - Provide rural services - Provide cultural and heritage activities	Approx. £1.5 million in total	Grants of between £2,000 and £35,000	2015-2020

Melton Mowbray Potential Projects							
Project Name	**Strategic Links**	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Livestock Market re-development	SEP: Business SGP: Tourism and Hospitality; Food and Drink Manufacture ESIF: Rural Activities	Melton BC	Secure the livestock and associated markets at the edge of town location for the next 20 years to help retain the unique character and identity of Melton Mowbray as the rural capital of Food & Drink	Construction of new livestock auction building and demolition of dilapidated cattle sheds. Reconfiguration of cattle market to improve traffic flows, site safety & improve potential for intensification of use of the site on none market days.	£5.5m	Awaiting final confirmation from LLEP for £3.5m funding from Growth Fund for 2016/17	
HLF Townscape Scheme	SEP: Place SGP: Tourism and Hospitality	Public/private	Improve physical appearance of the town centre to attract inward investment, enhance evening economy and support Purple Flag application June 2016.	Full Lighting Strategy, Market Place enhancement and Market improvements, buildings and shop frontages, signage. Heritage arts trail, Evening Arts Markets and City Dressing Scheme of lamp post banners and uplighting of buildings.			2016/17
Designated Coach Park	SEP: Place	Public	To provide a designated Coach Park	Provide a Coach Park with accessible toilets, ramps, drop off, information boards.			
Melton Food	SEP: People		To help deliver the	Welcome host, social			

Centre & Experience Melton project	SGP: Tourism & Hospitality; Food & Drink Manufacture ESIF: Skills Development; Social Inclusion		Experience Melton project by improving digital skills and marketing.	media, marketing, skills & training. New packages to create “offers” to encourage visitors and evening economy			
St Mary’s Hospital site, Thorpe Road	SEP: Business; Place ESIF: Employment	Private	Maximise development opportunities on the St Mary’s Hospital Site	Mixed use/economic development			2016/17
Phoenix House	SEP: Business; Place ESIF: Employment	Public	Maximise use of MBC building.	SME/Business Incubation/Mixed Use			
Co-Op site, Scalford Road	SEP: Business; Place ESIF: Employment	private	TCIM Model & Investment				2016/17
Bell Centre	SEP: Business; Place ESIF: Employment	private	TCIM Model & Investment				2016/17
Brooksby Melton College Asfordby Road Site & King Street site	SEP: People SGP: Tourism & Hospitality; Food & Drink Manufacture ESIF: Employment; Skills Development	Private	Continued development of Brooksby Melton College Site on Asfordby Road	New provision of training facilities and restaurant. Potential relocation of Library to open up development opportunities. Development of the Melton Theatre			2016

Create a sustainable tourism and local management model building on our Rural Capital of Food Brand and Tourism Blueprint	SEP: People; Business SGP: Food and Drink Manufacture ESIF: Employment; SME Competitiveness	Public/private	To create a recognised tourist destination for day and stay visitors. To strengthen the economy of the town centre and the Borough, increase jobs, GVA and become a thriving destination.	Development and promotion of quality attractions, experiences and accommodation			
Creating a virtual Good Growth Business Hub linked to the FEZ to deliver on our growth and development ambitions.	SEP: People; Business SGP: Food and Drink Manufacture ESIF: Employment; SME Competitiveness	Public/private	To help micro-enterprise, fledgling start-ups, entrepreneurs and SMEs	Providing an income-generating virtual business hub which will link to the LLEP business gateway. The Hub will provide bespoke training, leadership and business support targeted on family businesses, in the food and drink industry, as well as creative industries and knowledge-related sectors.			
Continuing support and development of the BID	SEP: Business SGP: All sectors ESIF: Innovation; SME Competitiveness; Employment;	Public	Consolidate and build on success to date, with BID renewal October 2016	Support the BID during its renewal in October 2016, in delivering over £0.75 million of investment in the town centre for a further 5			

	Skills Development			year period. Key activities: revive and thrive, going for purple flag, digital high street, further development of Town Centre App, website and wi-fi within the town centre.			
Business Support Project	SEP: People; Business SGP: Food and Drink Manufacture ESIF: Employment; SME Competitiveness	Public	Develop the food and drink sector	Supporting businesses wanting to commence food and drink production			

SHEPSHED

Shepshed Current Projects						
Project Name	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Shop Front Improvement Scheme	Shepshed Town Team (CBC/LCC)	To improve the character, appearance and appeal of the shopping centre	Grant funding of shop frontage enhancements	£60,000	Funding allocated in local authority budgets	Scheme expiry extended one year to March 2017.

Shepshed Potential Projects							
Project Name	**Strategic Links**	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Public realm improvements	SEP: Place SGP: Tourism and Hospitality	Shepshed Town Team (CBC / LCC)	To enable the delivery of a pedestrian spine consolidating the three separate components of the town centre	Public realm improvements to deliver greater pedestrian safety and comfort with associated amenities.	3 x £300k (est)	Partial funding from S106 contributions - £147k in total Balance LCC/CBC – LLEP Open Call pipeline project	Bull Ring (with Field Street) currently at the design stage with consultation anticipated in early summer 2016 with phase I implementation between 2018 - 2021
Former Britannia Inn Site	SEP: Place ESIF: Employment	Private	To support the delivery of the vision for a commercial spine consolidating Shepshed Town Centre	Engage with land owner / developers to secure a commercial use for a prominent vacant site enclosing Hall Croft		No funding in place	Subject to negotiation

Promotional literature; Shepshed Eye	SEP: Place	Private	To capture attention of newcomers	Promote what Shepshed has to offer and potential opportunities, both community and business focused			
Business, Community and Retail Support	SEP: Place; People SGP: SME Competitiveness; Employment	Public (CBC)	Improve access to community facilities and ensure retail floorspace needs are met	Create business space and provide start-up support			
Town Centre Access	SEP: Place	Public (CBC)	Improve access to and around town centre	Signage, pedestrian and cycle routes, public transport, highways and parking improvements including the widening of footpaths and narrowing of roads			

WIGSTON

Wigston Current Projects						
Project Name	**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Paddock Street Mixed use development	Public/Private	Job creation	Provision of new retail and leisure alongside new residential development Local Development Order in process at this location to encourage developers to come forward in the knowledge that planning permission will be in place		Part site in public ownership – need to identify a developer	Ongoing
Pride of the Borough and loyalty card		Encourage local shopping	Administration and promotion of the card			Being delivered

Wigston Potential Projects								
Project Name	**Strategic Links**	**Project Lead & Partners**		**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Burgess Junction mixed development	SEP: Place; Business ESIF: Employment	Public/private		Redevelop O&WBC car park at Burgess Junction (site identified within O&WBC Area Action Plan)	9,400 sq .m. retail 8,725 sq.m. commercial 400 space multi-storey car park Public realm improvements		Part site in public ownership – need to identify a developer	Dependant on identification of funding sources

Chapel Mill development	SEP: Place; Business ESIF: Employment	Public /private		Redevelop O&WBC car park on Leicester Road/Frederick street (site identified within O&WBC Area Action Plan)	1,765 sq. m. retail 3 storey commercial New town square Public transport area Disabled car parking		Part site in public ownership – need to identify a developer	Dependant on identification of funding sources
Health Centre Frederick St and Bell St	SEP: Place	Public /private		Consolidates existing surgeries	New Health centre development			Dependant on surgeries and support of Clinical Commissioning Group
Extension of Lanes and public realm improvements	SEP: Place SGP: Tourism and Hospitality	Public		Car park in ownership OWBC – site identified within O&WBC Area Action Plan				Dependant on identification of funding sources/ Local Development Order
Public realm improvements Leicester Road	SEP: Place SGP: Tourism and Hospitality	Public		To improve image on this main route through the town, more pleasant shopping environment and to increase footfall			LCC , LLEP LGF funding and S106 through other development sites listed above.	

Town wide public realm improvements	SEP: Place SGP: Tourism and Hospitality	Public		Improve the general appearance and attractiveness of the town, and create focal points for events			LCC , LLEP LGF funding and S106 through other development sites listed above.	Medium
Shop front improvements	SEP: Place; Business SGP: Tourism and Hospitality	Public/private		Improve the quality and consistency of appearance of the town centre.				
Public Transport Improvements	SEP: Place	Public and Private via providers		Improve connectivity between the town and the other towns in the local area i.e. Oadby and South Wigston	Work with public transport providers to test viability of new routes (demand assessment and highways review)		LCC and private bus operators.	Medium
Town centre rebranding	SEP: Place ESIF: Rural Activities	Public/local business forum/chamber of commerce		Celebrate uniqueness Encourage more visitors Raise profile	Create wider programme of events and promotion via existing digital display/information board plus new website/social media/Town app			
Community capacity building	SEP: People ESIF: Skills Development; Social Inclusion	Pubic/3rd sector		Increase the capacity and skills of local people to take ownership of smaller projects in the town	Training sessions; awareness raising; volunteer programme		VAL, OWBC	

Light night shopping pilot	SEP: Place; Business SGP: Tourism and Hospitality							

COUNTY-WIDE

Potential Projects (County-Wide)							
Project Name		**Project Lead & Partners**	**Key Aims**	**Main Activities**	**Costs**	**Funding Status**	**Timescales**
Market Towns Digital Project							
Free Wi-fi	SEP: Place, Business SGP: Tourism and Hospitality	LCC with Districts/Boroughs and town partners	To attract more footfall and engage in targeted marketing, improve virtual working for businesses and students	Investment in wi-fi and town centre app		Potential LLEP bid (ERDF, EAFRD, local authorities)	In place by October 2016 (in time for Christmas); ongoing marketing thereafter
Click and Collect	SEP: Place, Business SGP: Tourism and Hospitality	Market driven with support from BIDs and town centre partnerships	To drive footfall in town centres and support independents to broaden their offer	Determine feasibility of establishing click and collect facilities in towns where they don't exist and on behalf of independents	Modest pump priming	Market driven with some pump-priming	
Market Towns Quality Enhancement Project							
Improving the townscape	SEP: Place SGP: Tourism and Hospitality	Districts/Boroughs and town partners	Improve the visual appearance of town centre to attract businesses / investment and improve the visitor / resident experience	Raising the quality of the public realm (better street furniture, improved signage etc.); dressing derelict building /re-using vacant properties; shop front improvement schemes; traffic reduction and safety	Will depend on the extent of works and quality of finish determined for each town	Potential LLEP bid (ERDF funds have previously been accessed for this purpose); Historic England; HLF.	

Public Art	SEP: Place SGP: Tourism and Hospitality	Districts/Boroughs, town partners and ACE (EM)	Generate visitor and business interest and improve the town centre user experience and increase footfall	Commission, install and promote public artworks, include trails within and across market towns (opportunity to link to local heritage)	Costs will vary according to the nature and number of installations	Potential LLEP bid (ERDF funds have previously been accessed for this purpose) as well as Heritage Lottery/ ACE/EAFRD Tourism funds	
Market Towns Regeneration Project							
Key Sites Officer/Fund	SEP: Place	Districts/Boroughs and town partners	Bring derelict sites and vacant properties back into productive use	Liaise with Co-op, other multiples and owners of derelict sites/vacant properties to facilitate re-development or acquire to undertake re-development		Potential LLEP bid	These two projects could be linked into a broader programme to maximise available space in town centres – link to creative industries, universities and additional employment space.
Pop up Shops	SEP: Business; Place SGP: Tourism and Hospitality	LCC with Districts/Boroughs and town partners	Make use of vacant buildings and provide opportunities for independents to retail on prime sites	Liaise with unit owners, secure access and promote opportunities to independents	Cost will depend on the terms on which space can be leased from landlords, as well as any fitting out, promotional costs etc.	Potential LLEP bid and participant contributions	

Town Centre Enterprise Zones	SEP: Business; Place SGP: Tourism and Hospitality	LCC with Districts/Boroughs and town partners	Encourage non-retail/hospitality businesses to locate in town centres	Secure LLEP backing for a bid under the next round of EZ designations		BIS	The most recent EZ guidance changed to encourage more multi-site bids and more bids from rural areas.
Town Centre Investment Model	SEP: Business; Place SGP: Tourism and Hospitality	LCC with Districts/Boroughs and town partners	Create a viable and attractive mix of retailers and services	TCIM Model. Direct intervention in the assembly of property and effective asset management, as well as appropriate investment in the adjoining public realm		Potential LLEP bid	Need to reflect on the pilot in Melton Mowbray
Town Gateways	SEP: Business; Place SGP: Tourism and Hospitality	LCC with Districts/Boroughs and town partners	Enhance visual impact/sense of arrival into town centres	Commission gateway features appropriate to each town		Potential LLEP bid and Section 106 monies	Could make links to any town transport plans / feasibilities that are underway
Revitalisation of Markets	SEP: Business; Place SGP: Tourism and Hospitality; Food and Drink Manufacture ESIF: Rural Activities	Districts/Boroughs and town partners	To breathe new life into traditional markets	Establish county-wide programme to identify and implement bespoke interventions which improve market success factors e.g. location, style, business model. Touring market programme across all towns (perhaps food and drink)			Likely to involve a single post, liaising with local market managers and performing this role where no local manager exists

Market Towns Business Support Project							
Expert business advice	SEP: Business SGP: Tourism and Hospitality; food and Drink Manufacture ESIF: SME Competitiveness	LLEP Business Gateway Districts/Boroughs and town partners	Enable businesses to exploit new opportunities and mitigate threats, especially maximising retail and tourism offer	Ensure tailored business support to enable diversification into current and required services, retail, tourism that aids business sustainability e.g. retail merchandising		ERDF, Business Gateway, Tourism funds	
Market Towns Promotional Project							
Brand Development	SEP: Place SGP: Tourism and Hospitality	Combined Authority /Tourism support services	To strengthen individual town identities and how these link with county-wide and regional offer	Develop and promote a brand for each town based on its key strengths/ potential – look for collaboration opportunities between towns		ERDF, EAFRD, local authority, Great Place Fund	Link to tourism sector plan, inward investment, place marketing, tourism.
Festivals and Events	SEP: Place SGP: Tourism and Hospitality	Districts/Boroughs and town partners	Promote towns and generate footfall	Establish a programme of events/festivals, some unique to each town, others taking place across multiple towns	Costs will depend on the scale of events and their typologies	EAFRD, LEADER, local authorities, possible ACE funding	Creative, F&D, tourism
Improve online presence of Towns	SEP: Place SGP: Tourism and Hospitality	Potential Combined Authority project linked with tourism activity	To promote retail, hospitality and leisure offers as well as events in order to generate higher footfall	Review online content and opportunities for improving this in a coordinated way (many websites are about the town/town council not necessarily the town centre).		LLEP, Local authority	In place by October 2016 (in time for Christmas)

Showcasing Local products / produce	SEP: Place; Business SGP: Tourism and Hospitality; Food and Drink Manufacture ESIF: Rural Activities	LCC, Districts/Boroughs and town partners	To give local artists, producers and manufacturers local retail and showcasing opportunities	Liaise with unit owners, secure access and promote retail opportunities to local manufacturers/artists/ producers		Potential LLEP bid and participant contributions	Links to pop-up shops and business support activity
Joint Marketing/ independents	SEP: Place SGP: Tourism and Hospitality	LCC with Districts/Boroughs and town partners	To promote the interests of independents	Bring together independents within and across market towns for joint promotion, also developing/ strengthening links		Potential LLEP bid and participant contributions	
Town Trails	SEP: Place SGP: Tourism and Hospitality	Tourism support services with Districts/Boroughs and town partners	To generate footfall and route users around specific parts of town centres	Develop/install maps, walking routes, signage etc. within and across towns		ERDF, EAFRD, local authority, heritage funds	Perhaps greater potential in those towns where retail/hospitality offers are not readily seen/found
Printed Materials	SEP: Place SGP: Tourism and Hospitality	Districts/Boroughs and town partners	To promote town centre offers, especially in the context of new housing developments	Design, draft and distribute promotional materials		Local authorities /town centre partnerships/ BIDs	
Business Improvement Districts	SEP: Business SGP: All sectors ESIF: Innovation; SME Competitiveness; Employment; Skills Development	Town partners and LAs	Establish BIDs in towns that don't have one.	Ensure each town has a body whose focus is improving the prosperity of the town and increasing footfall and spend.		Potential LLEP bid / LA support / levy	

Media campaigns	SEP: Place SGP: Tourism and Hospitality	LCC with Districts/Boroughs and town partners	Inform residents, businesses and stakeholders of projects/plan in the town	Coordinate community activity		Local authority role	