Nathaniel Lichfield & Partners
Planning. Design. Economics.

Harborough Retail Study

Harborough District Council

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1.0 Introduction

1.1 Nathaniel Lichfield & Partners (NLP) has been commissioned by Harborough District Council to prepare a Retail Study Update, and provide an assessment of the changes since the 2007 Harborough Retail Study.

Study Objectives

1.2 The key objective of the Study is to provide a robust and credible evidence base to inform the Council's work on the next stages of the Local Plan preparation, taking into account changes since the previous study.

1.3 The objectives of the Study are to:

1. provide a commentary on the implications of the new policy context set out in the NPPF, highlighting any best practice;
2. assess and understand existing shopping patterns and the hierarchy and role of centres within the sub-region;
3. project population, expenditure, shopping patterns, new forms of trading (internet shopping) in the District at five year intervals over the plan period up to 2031;
4. assess the future quantitative and qualitative need and (residual) capacity for retail floorspace distributed within each centre;
5. review the ability of the three main centres, commitments and sites to accommodate projected needs;
6. review the appropriateness of the existing town centre boundaries;
7. provide advice on policies to be included in development plan documents to address future needs, and provide recommendations on how each town centre can develop its role.

1.4 Section 2 of this report summarises describes the shopping hierarchy. Section 3 outlines retail trends and the updated retail capacity and need assessment. Section 4 explores opportunities for accommodating growth, Section 5 reviews the Council's policies on primary shopping areas and Section 5 provides the recommendations and conclusions.

2.0 # The Shopping Hierarchy

Introduction

2.1 The National Planning Policy Framework (NPPF) indicates (paragraph 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Local Plans are expected to define a network and hierarchy of centres that is resilient to anticipated future economic changes.

2.2 The draft National Planning Practice Guidance (NPPG) recently published for consultation will when adopted replace the PPS4 guidance on town centres. In terms of plan-making the draft NPPG's emphasis is on developing strategies for town centres that are appropriate and realistic to the role of centres in the hierarchy. Town centre strategies should be based on the current state of a centre and opportunities to meet development needs (in full). These town centre strategies should seek to support the town centre vitality and viability, and should assess if changes to the role and hierarchy of centres are appropriate.

2.3 This section provides an overview of the shopping hierarchy in Harborough District and the surrounding sub-region.

The Harborough District Core Strategy

2.4 Policy CS1 in the Core Strategy indicates Market Harborough has a continuing role as the main focus for additional development. Lutterworth and Broughton Astley are also to be developed as "Key Centres", to provide additional housing, employment, retail, leisure and community facilities to serve each settlement and its catchment area.

2.5 Policy CS6 seeks to support the retail hierarchy in the District and identifies Market Harborough and Lutterworth as "town centres". Broughton Astley is defined as a "district" scale centre. These centres fall below Leicester and Northampton as city centres at the top of the shopping hierarchy.

2.6 Kibworth, Fleckney and Great Glen are defined as "rural centres" in Policy CS1 based on their service provision of all the six key services (General Practitioner, library, public house, primary school, food shop, Post Office) along with an hourly bus service to a key centre. Billesdon, Husbands Bosworth and Ullesthorpe are also identified as "rural centres" based on their service provision. All have provision of four of the six key services as a minimum. These rural centres are expected to be a focus for affordable and market housing, additional employment, retail and community uses to serve their rural catchment areas. Policy CS6 seeks to protect the network of smaller local centres and neighbourhood retail facilities across the District. Table 8 of the Core Strategy identifies all six rural centres as "local centres" within the retail hierarchy.

2.7 The retail hierarchy in Table 8 identifies four separate tiers, i.e. city, town, district and local centres. This is consistent with the NPPF, where the glossary at Annex 2 states that references to town centres or centres within the NPPF policy apply to city centres, town centres, district centres and local centres, but exclude small parades of shops of purely neighbourhood significance.

Centres in Harborough and the Surrounding Area

2.8 Harborough District is bounded by Blaby, Leicester, Oadby and Wigston, Melton, Rutland, Corby, Kettering, Daventry and Rugby local authority areas.

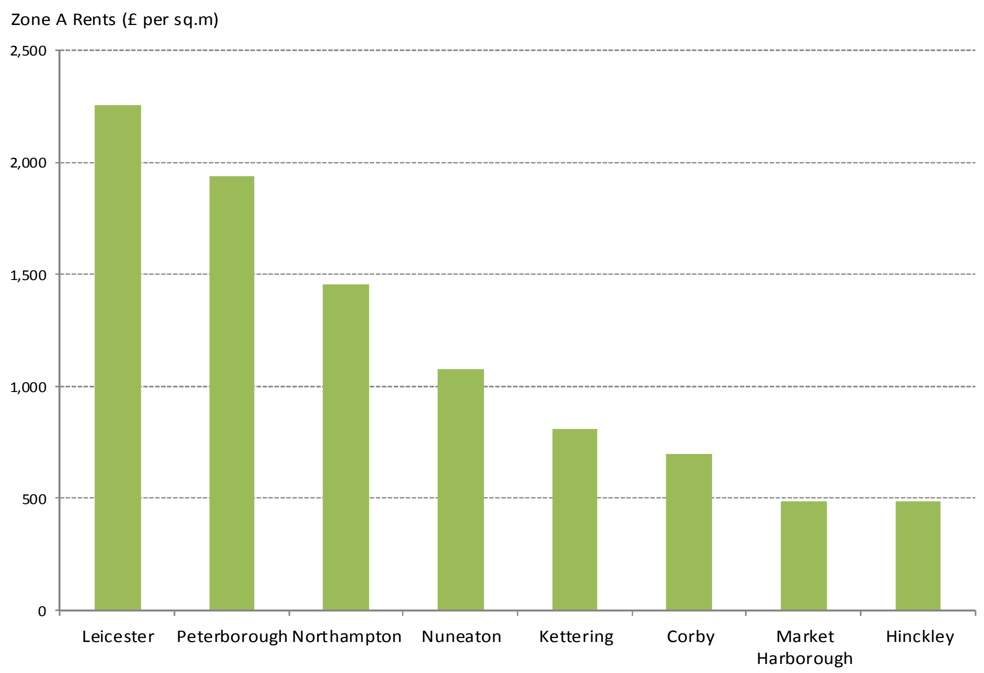
2.9 Leicester City centre is at the top of the shopping hierarchy, competing with other large regional/sub-regional centres, i.e. Nottingham, Peterborough, Coventry and Northampton.

2.10 Market Harborough and Lutterworth are the main shopping centres within Harborough District, supported by smaller village centres of Broughton Astley, Fleckney, Kibworth, Great Glen, Billesdon, Husbands Bosworth and Ullesthorpe.

2.11 Market Harborough is a second tier centre that falls within the regional shopping catchment area of Leicester city. Market Harborough competes primarily with other large to medium sized town centres such as Corby, Kettering and Rugby. Lutterworth is a much smaller town centre that serves a more localised catchment area than Market Harborough.

2.12 The relative performance and importance of town centres can be demonstrated by reviewing commercial property values for example Zone A rental levels achieved for retail property. Prime retail yields for selected centres are shown in Figure 2.1.

Figure 2.1 Retail Zone A Rents *(Source: Colliers CRE (2010)*



2.13 Valuation office information indicates that Zone A retail rents in Lutterworth are less than half those in Market Harborough at around £175 to £200 per sq m. In Broughton Astley zone A rents are around £110 to £150 per sq m.

Existing Retail Provision in Harborough

2.14 An assessment of the existing retail provision in the main centres is provided in the centre audits included at Appendix 4. A summary of existing retail provision in provided in Table 2.1 below.

Table 2.1 Existing Retail Shop Provision

Centre	Centre Class A Shop Units	Convenience Goods Floorspace (sq.m net)	Comparison Goods Floorspace (sq.m net)
Market Harborough	271	8,474	16,118
Lutterworth	89	3,291	2,502
Broughton Astley	48	889	400
Kibworth	28	665	300

Source: Goad Plans, VOA and NLP site surveys 2013

2.15 The audit of centres in Appendix 4 confirms that Market Harborough is the main shopping destination within the District, followed by Lutterworth. Town centres traditionally include market towns that provide a range of shops and facilities that serve an extensive rural catchment area.

2.16 The designation of Market Harborough and Lutterworth as second tier “town centres” is appropriate.

2.17 Broughton Astley is the largest village centre followed by Kibworth. District centres traditionally comprise groups of shops containing at least one supermarket and a range of non-retail services, such as banks, and restaurants, as well as local public facilities such as a library. Local centres include a small range of shops of a local nature, serving a small catchment. They might include a small supermarket, newsagent, post office, takeaways and pharmacy.

2.18 Based on the number, scale and type of shops and services available in Broughton Astley and its catchment area, the village centre should continue to be designated as a “district centre” rather than a “town centre”. The range and scale of facilities in other village centres in the District are more limited than in Broughton Astley and these centres should continue to be designated as “local centres”.

2.19 National and local policy indicates that it is important for the District’s town centres to maintain and strengthen their role in the retail hierarchy. The smaller centres should continue to perform a more local function meeting day to day shopping and service needs.

3.0 Assessment of Retail Need

Introduction

3.1 The National Planning Policy Framework (NPPF) indicates (paragraph 14) that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs.

3.2 The draft National Planning Policy Guidance (NPPG) indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses.

3.3 The draft NPPG also introduces the requirement to consider a range of plausible scenarios, including a 'no development' scenario, which should not assume that all centres are likely to benefit from expenditure growth.

3.4 This section objectively assesses the quantitative and qualitative scope for new retail floorspace in Harborough in the period from 2013 to 2031. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken as part of the town centre audits in Appendix 4.

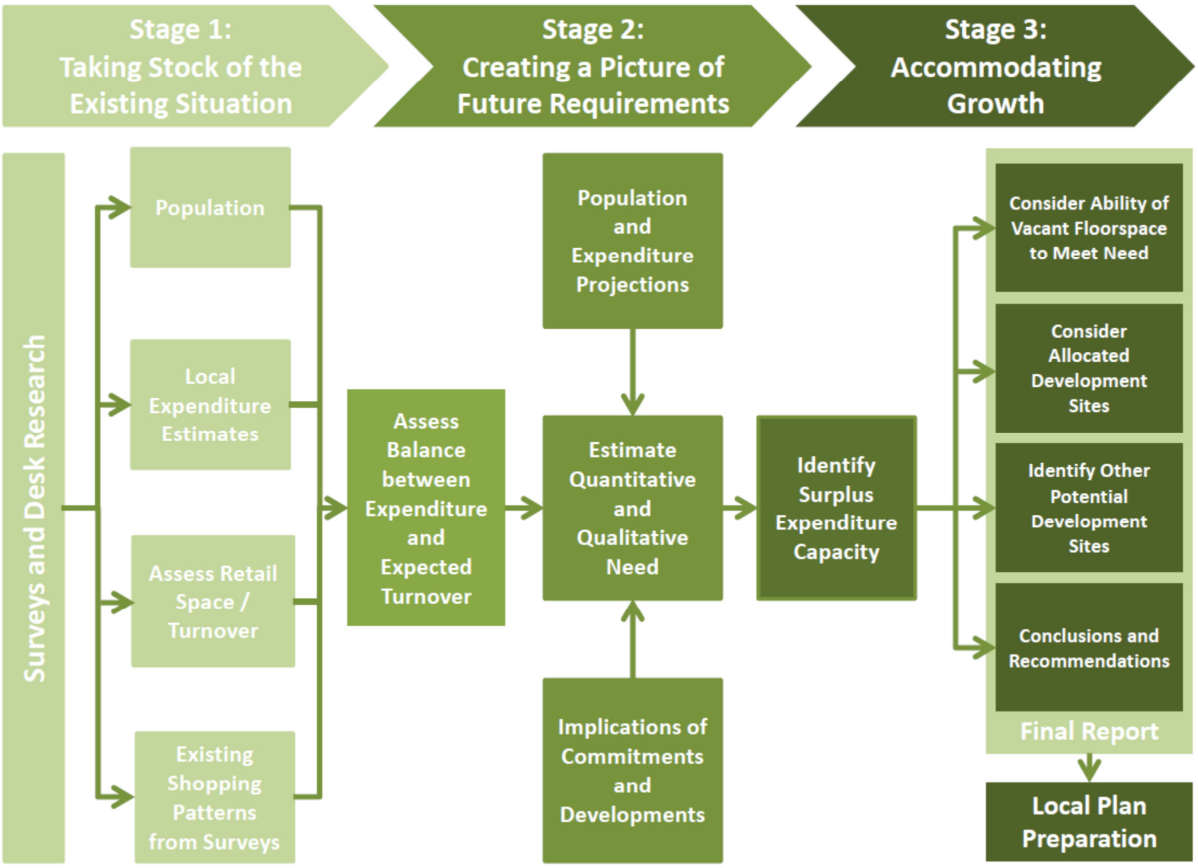
Study Area

3.5 The quantitative analysis is based on a defined study area that covers the catchment areas of the main shopping destinations in the District. The study area is sub-divided into six zones as shown in Appendix 1. The survey zones are based on administrative wards and take into consideration the extent of the primary catchment areas of Market Harborough, Lutterworth and Broughton Astley.

3.6 The primary catchment areas are the area where each centre will attract the vast majority of its retail trade. There will be retail expenditure leakage from the study area to centres outside, but conversely expenditure inflow from surrounding areas.

3.7 The methodology is summarised in Figure 3.1 overleaf and set out in more detail in Appendix 1.

Figure 3.1 Methodology for Estimating Future Requirements for Retail Floorspace



Retail Trends

3.8 This section considers the changes in the retail sector nationally and the implications for Harborough District.

3.9 The economic downturn had a significant impact on the retail sector. A large number of national operators failed (e.g. Blockbuster, Comet, HMV, JJB Sports, Jessops, Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat), leaving major voids within centres and retail parks. Argos recently announced major shop closures. Many town centre development schemes have been delayed and the demand for traditional bulky goods retail warehouse operators was affected. Even some of the main food store operators have seen a reduction in growth, with discount operators taking market share from the main operators.

3.10 Assessing future expenditure levels within this study needs to take into account the likely timing and speed of the economic recovery, particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the plan period. This study takes a long term view for the plan period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken.

3.11 An overview of national tends within the retail sector is set out below

Expenditure Growth

3.12 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However the recovery from the economic downturn is expected to result in slower growth in the short term.

3.13 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The speed of recovery from the economic downturn suggests that high past rates of growth are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further modern retail floorspace, even allowing for continued growth in home shopping. These national trends are anticipated to be mirrored in Harborough District.

New Forms of Retailing

3.14 New forms of retailing have emerged in recent years as an alternative to more traditional shopping facilities. Home/electronic shopping has also emerged with the increasing growth in the use of personal computers, smart phones and the internet. Trends within this sector may well have implications for retailing within Harborough District. The continued growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street and in Harborough.

3.15 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure.

3.16 The household survey results suggest 4.6% of households in the Harborough Study Area did their last main food and grocery shopping on the internet and 6.4% of households do most of their non-food shopping at home via the internet, TV or catalogue. These figures represent a lower proportion than the internet's national share of retail expenditure (about 9%, Experian September 2012). This may be in part due to the lack of broadband in some rural areas of the District.

3.17 More details on internet shopping habits in the District are set out in the results of the household survey, summarised in Appendix 5. The internet shopping figures for Harborough appear to be lower than the current national average, however internet sales in Harborough should increase in the future and this assumption is reflected in the allowance made for a growth in the proportion of non-store spending, as set out in the retail capacity methodology in Appendix 1.

3.18 Recent trends suggest continued strong growth in this sector, but there is still uncertainty about its longer-term prospects and the potential effects on the high street. Experian's Retail Planning Note 10 states:

"The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for around a tenth of total retail sales.

The rising share of internet sales in total retail transactions dominates the picture of SFT. Internet sales' share of total retail sales stood at near 9% in 2012 against 4.7% in June 2008 and just 2.9% as recently as March 2007.

Non-store retailing continues to grow rapidly, despite the tough retail environment. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the medium term. It is estimated that 85% of the UK adult population were internet users at the end of 2011, so growth of the internet user base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We now expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2020. Our new forecast has the SFT share of total retail sales reaching 17.4% by 2020 (15.4% in Retail Planner Briefing Note 9 of September 2011), rising to 20% by the end of the 2020s (15.5% previously)."

3.19 This Study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

3.20 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators, therefore growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure (as set out in the retail capacity methodology, Appendix 1).

3.21 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. For example, extended opening hours and Sunday trading increased significantly in the 1990s. Retailers also responded to stricter planning controls by changing their trading formats to include smaller store formats capable of being accommodated within town centres (such as the Tesco Metro, Sainsbury Central/Local store and Marks & Spencer's Simply Food formats). The main food store operators have also increasingly sought representation in small towns in predominantly rural areas. The expansion of European discount food operators Aldi and Lidl has also been rapid during the last decade.

3.22 Food store operators have had a recent programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have often increased the sale of non-food products within their food stores, including clothing and electrical goods. The recent recession halted this trend, and is now reversing it.

3.23 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across Great Britain. Sports clothing retail warehouses including Decathlon have also expanded out-of-centre.

3.24 Within town centres, many high street multiple comparison retailers have changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger regional and sub-regional centres, e.g. Leicester.

3.25 The economic downturn has had, and is likely to continue to have, an impact on the retail sector. The effects of the recession may continue to have an impact on shop vacancy levels in the District. The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, is particularly weak at present.

3.26 A key effect the economic downturn has had on high streets is the increase in vacant shop units. The average unit vacancy rate increased from below 9%

before the recession began in 2008 to the current figure of just under 14% (source: Experian Goad Plans).

3.27 Harborough District appears to have withstood the effects of the recession reasonably well in terms of shop vacancies. The current vacancy rate is significantly below the national average in Market Harborough, Lutterworth and Broughton Astley.

3.28 The continuation of national trends will influence future operator requirements across Harborough District with smaller vacant units becoming less attractive for new occupiers and existing retailers looking to relocate into larger units in higher order centres.

3.29 Operator demand for space has decreased during the recession, and of those retailers looking for space, many are likely to prefer to locate in larger centres, particularly multiple retailers. Demand from multiple retailers within Harborough District is likely to be weaker particularly in Lutterworth and Broughton Astley, which will affect the appropriate strategies for these centres.

Population and Expenditure

3.30 The study area population for 2011 to 2031 is set out in Table 1 in Appendix 2. Ward level population data provided by Experian, based on the 2011 Census have been adopted. The 2011 base year population for each zone has been projected to 2031 based on the Projection 1 – Sub-National Population (SNPP) in the GL Hearn Harborough Housing Requirements Study March 2013> this projection assumes 405 new dwellings per annum, i.e. just over 8,000 additional homes between 2011 and 2031.

3.31 Alternative low and high population growth scenarios have been tested. Projection Y (past completion rates) has been adopted as the low growth scenario from the GL Hearn Study (340 dwellings per annum) has been tested. Projection B (residents in employment projection)past completion rates) has been adopted as the high growth scenario from the GL Hearn Study (518 dwellings per annum) has been tested. These figures are expected to provide the appropriate maximum and minimum range for growth in the District.

3.32 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2031. Forecasts of comparison goods spending per capita are shown in Table 2 in Appendix 3.

3.33 Based on the baseline population projection (405 dwellings per annum), as a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 26% from £217.07 million in 2013 to £274.42 million in 2031, as shown in Table 3 (Appendix 2).

3.34 Based on the baseline population projection (405 dwellings per annum), comparison goods spending is forecast to increase by 80% between 2013 and

2031, increasing from £328.89 million in 2013 to £592.7 million in 2031, as shown in Table 3 (Appendix 3).

3.35 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on food and drink does not increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income.

3.36 These figures relate to real growth and exclude inflation.

Existing Retail Floorspace 2013

3.37 Existing convenience goods retail sales floorspace within Harborough District is 14,073 sq.m net, as set out in Table 10 in Appendix 2. This floorspace figure excludes comparison sales floorspace within food stores. Over 60% of this food and grocery sales floorspace is located in Market Harborough, with 23% in Lutterworth.

3.38 Comparison goods retail floorspace within Harborough District is estimated to be 24,790 sq.m net, as shown in Table 10 in Appendix 3. Over 86% of this non-food/durable goods sales floorspace is located in Market Harborough, with 10% in Lutterworth.

Existing Spending Patterns 2013

3.39 The results of the household shopper questionnaire survey undertaken by NEMS in August 2013 have been used to estimate existing shopping patterns within the study area zones. A summary of the methodology and results is shown in Appendix 5.

Convenience Shopping

3.40 The results of the household shopper survey relating to main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 2.

3.41 Table 4 (Appendix 2) indicates the proportion of convenience goods expenditure within each zone that is spent within Harborough District ranges from 31.9% in Zone 6 (the rural area to the east of Market Harborough) up to 90.5% in Zone 5 (Market Harborough urban area). The retention of convenience goods expenditure within Market Harborough's and Lutterworth's primary catchment area is relatively high, and there appears to be limited scope to increase the two town's market share of expenditure. Broughton Astley's market share of expenditure in its zone (Zone 2 – Lutterworth Rural) is relatively low at 18%, and there could be scope to increase this share.

3.42 The level of convenience goods expenditure attracted to shops/stores in Harborough District in 2013 is estimated to be £136.92 million as shown in

Table 5, Appendix 2. This includes estimates of inflow from beyond the study area, applying the market shares set out in Table 4.

3.43 The total benchmark turnover of identified existing convenience sales floorspace within the six main centres (Market Harborough, Lutterworth, Broughton Astley, Fleckney, Great Glen and Kibworth) in Harborough District is £122.93 million (Table 10, Appendix 2). The actual turnover of this convenience floorspace is £135.48 million (Table 5, Appendix 2) excluding “other Harborough”.

3.44 These figures suggest that convenience goods retail sales floorspace in the six main centres are collectively trading about 10% above average, with a surplus of available convenience expenditure of £12.55 million.

Comparison Shopping

3.45 Table 4 (Appendix 3) indicates the proportion of comparison goods expenditure within each zone that is spent within Harborough District ranges from 13.9% in Zone 2 (the rural area around Lutterworth) up to 47.2% in Zone 5 (Market Harborough urban area). The retention of comparison goods expenditure is much lower than for convenience goods. This reflects customers propensity to do food and grocery shopping locally, whilst for comparison shopping customers are more likely to shop around and/or travel longer distances to visit larger centres that have more choice. The ability to increase comparison goods market share will be constrained by larger centres in the sub-region.

3.46 The estimated comparison goods expenditure currently attracted by shopping facilities within Harborough District is £107.06 million in 2013, as shown in Table 5, Appendix 3. This includes estimates of inflow from beyond the study area.

3.47 Based on this expenditure estimate, the average sales density for existing comparison goods sales floorspace in the District (24,790 sq.m net) is £4,277 per sq.m net. The analysis of existing comparison shopping patterns in 2013 suggests the following average sales density figures for the centres in Harborough District shown in Table 3.1.

Table 3.2: Comparison Goods Average Sales Densities

Centre	**Average Sales Density 2013 (£ per sq.m net)**
Market Harborough	£4,196
Lutterworth	£5,124
Broughton Astley	£2,350
Other Harborough District	£2,811

Harborough Average	**£4,277**

3.48 Market Harborough has a better range of higher order comparison retailers than any other centre in Harborough District, but has a below average sales density. This relatively low sales density reflects the high proportion of retail warehouse floorspace in Market Harborough (5,270 sq.m net – 25% of total floorspace). Retail Warehouse sales floorspace tends to trade at a much lower density than high street shops. Broughton Astley and local centres have a much lower trading density, which reflects the predominance of independent traders.

3.49 There is no evidence to suggest existing comparison sales floorspace is over-trading anywhere in the District, or that there is surplus comparison expenditure available to support new development at present. Existing floorspace appears to be trading satisfactorily in difficult market conditions. In Broughton Astley the figures suggest comparison goods retailers may be struggling and some future growth will be needed to secure their viability.

Capacity for Convenience Goods Floorspace

3.50 As a minimum it is appropriate and realistic to plan to maintain the District's market share of convenience goods expenditure in the future. Planning for a decline in market share would not be sustainable and would not address the needs of local residents. It should be noted that as the forecast increase in internet spending is taken into account in projecting available expenditure in the future, this will have the effect of reducing the actual requirement for additional floorspace.

3.51 Convenience goods expenditure retention rates are relatively high in Market Harborough and Lutterworth's primary catchment areas. The market share in Broughton Astley's catchment area is relatively low and there may be potential to increase this market share, if food store provision is improved within the town. This potential scenario is tested later in this section.

3.52 Based on constant market shares and baseline population projection (405 dwellings per annum), the future level of available convenience goods expenditure at 2016, 2021, 2026 and 2031 is shown at Tables 6, 7, 8 and 9 in Appendix 2.

3.53 The total level of convenience goods expenditure available for shops in the District between 2013 and 2031 is summarised in Table 11 (Appendix 2). Convenience expenditure available to shopping facilities in the District is expected to increase from £136.92 million in 2013 to £173.10 million in 2031.

3.54 Table 11 subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further development. Within the District, there is an expenditure surplus of £12.55 million convenience goods expenditure in 2013. This surplus will increase to £15.78 million in 2016. Continued future growth produces a surplus of £30.59 million in 2021, increasing to £37.44 million in 2026 and £48.73 million in 2031.

3.55 The surplus expenditure projections have been converted into potential new floorspace estimates at the foot of Table 11. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure, based on the average turnover of the main food supermarket operators. An average sales density of £12,309 per sq.m net has been adopted for Market Harborough, Lutterworth and Broughton Astley, assuming the retail capacity will primarily be met by main food store operators. In the other smaller centres an average sales density of £4,500 per sq.m is adopted for small local shops.

3.56 The short to medium term capacity figures up to 2021 suggest surplus of available convenience goods expenditure could support an additional 2,161 sq.m net (3,087 sq.m gross), primarily concentrated in Market Harborough and Lutterworth. In the long term, surplus expenditure at 2031 could support 4,280 sq.m net of sales floorspace (6,114 sq.m gross) in the District as a whole, as shown in Table 11, Appendix 2.

3.57 By way of comparison, the previous Harborough Retail Study in 2007 suggested a convenience goods floorspace requirement for the District of 4,169 sq.m net between 2007 and 2026, based on constant market shares.

Alternative Scenarios

3.58 The floorspace projections above are based on 405 new dwellings per annum in Harborough District. The implications of 340 dwellings per annum (low growth) and 518 dwellings have been tested, see below.

	340 Dwellings pa	**405 dwellings pa**	**518 dwellings pa**
2031 convenience sales floorspace sq.m net	3,711	4,280	5,257

3.59 The implications of the lower dwelling completions have a limited impact on the retail floorspace projections even at 2031, only 569 sq.m lower than the baseline figures. The impact of the high population figure is 23% higher than the baseline figure but most of this difference occurs at the latter end of the plan period 2026 to 2031. Longer term projections are less reliable and will need to be monitored and reviewed.

3.60 If the amount of convenience goods expenditure retention within Broughton Astley's catchment area is increased then the market share of other towns will decreased, in particular Lutterworth's market share of expenditure. Nevertheless the long term floorspace projection to 2031 (based on the baseline population) would increase marginally to 4,881 sq.m net (6,973 sq.m gross), as shown in Tables 12 and 13 in Appendix 2.

3.61 The 2031 floorspace projection for Broughton Astley increases from 192 sq.m net to 1,363 sq.m net, which is sufficient to support a medium sized food supermarket. This increase would primarily be a result of the claw back of expenditure leakage from the District, rather than trade diversion between centres within the District.

Capacity for Comparison Goods Floorspace

3.62 The household survey suggests that the District's retention of comparison goods expenditure is much lower than for convenience goods. The lower level of comparison expenditure retention is due to the strength of competing comparison goods facilities in neighbouring authorities, in particular Leicester.

3.63 Future improvements to comparison retail provision within the District could help to claw back some additional expenditure leakage from the study area. However major developments in neighbouring authorities will limit the ability of shopping facilities in the District to increase their market share of expenditure. Retail development will be necessary in Harborough District in order to maintain existing market share in the future. An appropriate strategy for Harborough District should be to seek to maintain existing 2013 market shares for the town centres in the face of increasing future competition, whilst maintaining the vitality and viability of centres.

3.64 We consider that it is realistic and appropriate to plan to maintain market shares. The centres within Harborough District should be capable of maintaining their existing comparison market share despite increasing competition in nearby centres. The Harborough District centres should plan to maintain their existing role, which is complementary to the higher order regional and sub-regional centres.

3.65 Based on the baseline population projection (405 dwellings per annum), available comparison goods expenditure has been projected forward to 2016, 2021, 2026 and 2031 in Tables 6, 7, 8 and 9 in Appendix 3, and summarised in Table 11. Available comparison expenditure to facilities within the District is expected to increase from £107.06 million in 2013 to £192.93 million in 2031.

3.66 The amount of expenditure available in each town is compared with the benchmark turnover of existing comparison retail floorspace, as shown in Table 12 (Appendix 3). Table 12 assumes that the benchmark turnover of comparison floorspace will increase in real terms. A growth rate of 2% per annum is adopted, and this growth is required to maintain the health and viability of town centres. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

3.67 Within Harborough District, by 2016 there will be a small expenditure surplus of £2.2 million. This surplus increases to £9.85 million in 2021. By 2031, future expenditure growth generates an expenditure surplus of £40.03 million.

3.68 Surplus comparison expenditure has been converted into net comparison sales floorspace projections at the foot of Table 11 in Appendix 3, adopting an average sales density of £5,000 per sq.m in 2013, which is projected to grow by 2% in the future due to improved turnover efficiency. The surplus expenditure at 2031 could support 5,605 sq.m net of sales floorspace (7,473 sq.m gross).

3.69 The previous retail study in 2007 suggested a comparison goods floorspace requirement for the District of 16,913 sq.m net between 2007 and 2026, based on constant market shares.

3.70 The updated projection for 2031 within this study update (5,605 sq.m net) is significantly lower because of the effects of the recession on expenditure growth between 2007 and 2013 and lower future growth forecasts (i.e. 2.9% growth per annum rather than 4.4% growth).

Alternative Scenarios

3.71 The floorspace projections above are based on 405 new dwellings per annum in Harborough District. The implications of 340 dwellings per annum (low growth) and 518 dwellings have been tested, see below.

	340 Dwellings pa	405 dwellings pa	518 dwellings pa
2031 comparison sales floorspace sq.m net	4,773	5,605	7,218

3.72 The implications of the lower dwelling completions again have a limited impact on the retail floorspace projections, only 832 sq.m lower than the baseline figures. The impact of the high population figure is 29% higher than the baseline figure, but again most of this difference occurs at the latter end of the plan period 2026 to 2031.

Qualitative Need for Retail Floorspace

3.73 Qualitative need can be assessed through consideration of the following factors:

- deficiencies or ‘gaps’ in existing provision;
- consumer choice and competition;
- overtrading, congestion and overcrowding of existing stores;
- location specific needs such as underserved markets; and
- the quality of existing provision.

Convenience Goods Shopping

3.74 The household survey results indicate that most residents in the study area undertake both a main shopping trip and top-up shopping trips. Main shopping trips are generally made once a week or less often, and the household survey identified that 87% of respondents travel to do their main food shopping by car (both driver and passenger). The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores are the usual destination for these types of shopping trip.

3.75 There is only one large food stores of over 2,000 sq.m net) within the District, i.e. the Sainsbury's (2,263 sq.m net) in Market Harborough. In addition to this large store there are three medium sized supermarkets (over 1,000 sq.m net) within the District, i.e. Waitrose (1,543 sq m net) and Co-op (1,029 sq.m) in Market Harborough and Morrison's (1,672 sq.m net) in Lutterworth.

3.76 These larger food stores are supported by a good range of smaller supermarkets and convenience stores. The discount food sector is well represented in Market Harborough with Aldi and Lidl stores. There is an excellent choice of food stores in Market Harborough, with Aldi, Co-op, Lidl, Sainsbury's, Tesco and Waitrose all accessible within or on the edge of the town centre. Market Harborough has a good selection of specialist food shops, as indicated in the audit of the town centre in Appendix 4.

3.77 Lutterworth also has a reasonable choice of food stores for a town of its size, with Morrison's, Co-op and Waitrose supermarkets. Food store provision in Broughton Astley is more limited with small Co-op and Spar stores. Broughton Astley is the most obvious area of deficiency in terms of food store provision within the District.

3.78 The retail capacity projections set out in Table 11 in Appendix 2 suggest there is surplus convenience goods expenditure at 2021 in Market Harborough (£17.78 million) and Lutterworth (£6.86 million). There is limited surplus convenience goods expenditure in Broughton Astley based on existing market shares. However some of the expenditure surplus in Lutterworth, and to a lesser extent Market Harborough, could be accommodated in Broughton Astley if the expenditure retention rate within the Broughton Astley zone is increased.

3.79 The qualitative assessment suggests the priority for short to medium term food store development should be within Broughton Astley. In qualitative terms the choice of food store in Market Harborough and Lutterworth is good.

High Street Comparison Shopping

3.80 Market Harborough is the main high street comparison shopping destination within the District. Lutterworth to a much lesser extent provides residents with comparison shopping facilities. The smaller centre of Broughton Astley has a much more limited comparison goods offer. The centres in Harborough District are much smaller than larger centres surrounding the District, in particular Leicester and Kettering, which are accessible to residents within the District and have a more extensive range of multiple retailers than Market Harborough.

3.81 The centre audits in Appendix 4 identify that only Market Harborough has a significantly higher proportion of comparison retail units compared with the national average. Lutterworth has a reasonable range of comparison shops, but most of these are small independent traders. Market Harborough has representation in most comparison goods categories and there is a choice of outlets within each category (139 comparison shops in total). The clothing and footwear sector is well represented with 49 shops. Market Harborough has a good mix of lower and higher order comparison goods. Lower order comparison goods are items bought on a regular basis, where customers are less likely to shop around or travel long distances to shop. Higher order goods tend to be higher value items brought occasionally, where customers window shop and compare prices and goods. Healthy town centres usually have a good mix of higher and lower order comparison goods shops.

3.82 There is a more limited range and choice of comparison shops in Lutterworth (39 in total), with very limited choice within each goods category. Lutterworth only has 3 clothing and footwear shops, and the comparison retail offer is dominated by shops selling lower order comparison goods. Customers in the Lutterworth area will tend to look to Leicester for higher order comparison goods.

3.83 Broughton Astley has a very small selection of comparison shops (16 in total), and most are small independent traders and shops selling lower order comparison goods, such as pharmaceutical goods, flowers and other day to day items.

Retail Warehouses and Bulky Goods

3.84 The only retail warehousing within Harborough District is concentrated in Market Harborough. Market Harborough has a modest selection of retail warehouses selling bulky goods (DIY, electrical, carpets and furniture).

3.85 Springfield Street Retail Park, adjacent to the Sainsbury's store in Market Harborough, has three large format stores occupied by Homebase DIY, Brantano shoes and a Poundstretcher discount store.

3.86 The Focus DIY store in Market Harborough closed when the company went into administration in 2011. The DIY sector is also served by builder's merchants e.g. Travis Perkins and Build Centre.

3.87 Three Manors Retail Park in Market Harborough includes Topps Tiles and Heavenly Feet. Other out of centre stores in Market Harborough include Carpetright, Halfords, Furniture Barn and Brookside Carpets.

3.88 The Lutterworth and Broughton Astley areas and northern parts of the District are predominantly served by bulky goods retail warehouse units located outside of the District, e.g. in Leicester. Market Harborough is probably the only town with a catchment population large enough to support bulky goods retail warehouse operators. There may be scope to improve bulky goods retail warehousing in Market Harborough when the economic climate improves.

3.89 Any out-of-centre retail warehouse proposal would need to be considered on its individual merits. The applicant would need to clearly demonstrate that the nature of retail floorspace proposed cannot be adequately accommodated within existing centres, allowing scope for disaggregation and flexibility, and that the development would not harm designated centres.

4.0 Accommodating Growth

Introduction

4.1 The National Planning Policy Framework (NPPF) indicates (paragraph 23) that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres. The need for development should be met in full and should not be compromised by limited site supply. In order to accommodate growth local planning authorities should assess the need to expand town centres to ensure a sufficient supply of suitable sites. NPPF (paragraphs 23 and 24) indicates local planning authorities should apply a sequential approach for development.

4.2 The draft National Planning Policy Guidance indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through expanding centres, with the sequential test to be followed.

4.3 The NPPG acknowledges that not all successful town centre regeneration projects are retail-led, or will involve significant new developments. Public realm, transport and accessibility improvements can play important roles. Town centre car parking strategies, in a move away from resisting parking in town centres, are to encourage improvements to both the quality and quantity of car parking provision, where required to enhance the performance of town centres.

4.4 This section assesses the scope to accommodate growth with and on the edge of Harborough District's main town centres.

Floorspace Projections

4.5 The floorspace projections set out in the previous section assume that new shopping facilities within Harborough District can maintain their current market share of expenditure within the study area, recognising that other competing centres will improve in the future. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- major retail developments in competing centres;
- the re-occupation of vacant retail floorspace;
- the availability of land to accommodate new development;
- the reliability of long term expenditure projections;
- the effect of Internet/home shopping on the demand for retail property;
- the level of operator demand for floorspace in Harborough District;

- the likelihood that Harborough District's existing market share of expenditure will change in the future in the face of increasing competition;
- the potential impact new development may have on existing centres.

4.6 The draft NPPG suggests town centre strategies should plan for a 3-5 year period, but the longer term plan period should be considered. Projections up to 2021 are realistic and are based on up to date forecasts, which take into account the effects of the recession. The long term floorspace projections (up to 2026 and beyond) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development management decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under-review.

4.7 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. The impact of Internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and internet services utilise existing stores rather than warehouses, for example Tesco Direct. Growth in internet sales will not always reduce the demand for shop floorspace. In addition, some of the growth in Internet sales may divert trade away from mail order companies rather than retail operators. Overall the long term impact of home shopping on expenditure projections is uncertain.

4.8 The quantitative and qualitative assessment of the potential for new retail floorspace within the previous sections suggests there is scope for new retail development within Harborough District during the Plan period (to 2031). This section examines the opportunities for accommodating this projected growth and assesses potential to accommodate this floorspace.

4.9 The projections up to 2031 suggest there is scope for 6,114 sq.m gross of convenience goods floorspace and 7,473 sq.m gross of comparison goods floorspace.

4.10 These projections relate to Class A1 retail uses only. Based on the current mix of floorspace within town centre in Harborough District, there should also be scope for around 15% of additional floorspace that can be occupied by Class A2 to A5 uses and Class A1 non-retail services. Table 4.1 below summarises the floorspace projections by centre in 2031.

Table 4.1: Summary of Floorspace Projections 2031 (sq.m gross)

Centre	Convenience	Comparison	Service Uses	Total
Market Harborough	3,607	6,264	1,481	**11,352**
Lutterworth	1,509	895	361	**2,765**
Broughton Astley	274	65	51	**390**
Other Harborough	724	249	146	**1,119**
Total	**6,114**	**7,473**	**2,039**	**15,626**

Source: Table 11 in Appendix 2 and Appendix 3

Accommodating Future Growth

4.11 The sequential approach suggests that designated town centres should be the first choice for retail and leisure development. In accommodating future growth, the following issues should be taken into consideration:

- What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?
- Is the nature and scale of development likely to serve a wide catchment area?
- Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?
- If the development has a more localised catchment area, is a site available in a local centre and will this site meet the identified need?

4.12 All development should be appropriate in terms of scale and nature to the centre in which it is located.

4.13 The existing stock of premises will have a role to play in accommodating projected growth, during the economic recovery. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. For comparison goods, a growth rate of 2% per annum is assumed. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

4.14 There are 30 vacant shop units within the three main centres (Market Harborough, Lutterworth and Broughton Astley), which equates to an overall vacancy rate of 7.4%, which is much lower than the Goad national average (13.7%). The total amount of vacant floorspace is approximately 3,000 sq.m gross.

4.15 As a target, the current vacancy level in these three town centres could fall to 5%. If this reduction in vacancy rate is achieved then the number of reoccupied units would be 6 re-occupied units in Market Harborough, 3 units in Lutterworth and 1 unit in Broughton Astley. The reoccupation of 10 vacant units could accommodate about 1,000 sq.m gross of Class A1 to A5 floorspace. Based on existing vacancy levels, this potential re-occupied space could be distributed as follows:

- **Market Harborough** 600 sq.m gross
- **Lutterworth**: 300 sq.m gross
- **Broughton Astley:** 100 sq.m gross

4.16 If this reduction in vacant units can be achieved, then the overall Class A1 to A5 floorspace projection up to 2031 would reduce from 15,626 sq.m gross (Table 4.1 above) to 14,626 sq.m gross.

Development Opportunities

Market Harborough Town Centre

4.17 Within Market Harborough town centre, major development options appear to be limited. Three potential development sites have been identified (see Appendix 6), i.e. Commons Car Park, Springfield Retail Park Car Park and Land at School Lane.

4.18 The Commons Car Park site could provide an opportunity to extend/expand existing food stores (Co-op and Tesco Metro), to provide up to an additional 1,500 sq.m gross of convenience floorspace (about 1,000 sq.m net sales). If implemented this would meet the short term projection (up to 2016) for convenience goods floorspace for Market Harborough, but would only meet a third of the projection of the plan period as a whole. We understand the Council is not currently pursuing the development of this site and any development would need to consider the implications for the car parking strategy for the town centre.

4.19 Under-utilised land between School Lane and the High Street could be developed to provide about 2,000 sq.m of retail (A1 to A5) use, in the form of an arcade of small units. This arcade could be directly linked to the High Street.

4.20 The east side of the Springfield Retail Park surface car park could accommodate large format retail units of at least 2,000 sq.m gross if decked car parking is provided to replace lost spaces.

4.21 Together these three opportunities could accommodate 5,500 sq.m gross of Class A1 to A5 floorspace. With vacant shop units, these three sites could accommodate 54% of the Market Harborough floorspace projection up to 2031 (11,400 sq.m gross).

4.22 Other development opportunities within the town centre are likely to be small scale (less than 500 sq.m gross). The town centre is constrained by the historic street layout and adjacent residential areas, and there are limited opportunities to extend the centre. The future focus for the primary shopping area is likely to be small scale intensification and extensions.

4.23 Longer term growth could be accommodated adjacent to the town centre in the area along St. Mary’s Road towards the railway station. The redevelopment site at the junction of St. Mary’s Road and Kettering Road could include Class A1 to A5 along the ground floor frontage on to St. Mary Road (approximately 1,000 sq.m gross. On the opposite side of St. Mary's Road, the former Travis Perkins premises on Clarence Street provides a large vacant site (about 0.7ha) that could accommodate large format retail development (over 2,000 sq.m gross at ground floor level).

Lutterworth Town Centre

4.24 Two potential development sites have been identified within Lutterworth town centre, i.e. back land to the west of Bank Street and land adjacent to the Waitrose store.

4.25 Land to the west of Bank Street comprises private car parks and service areas to the rear of the High Street. This area has the potential to provide 4-5 retail units (1,000 sq.m retail unit for A1 to A5 uses) fronting onto Bank Street. There is potential to extend the existing Waitrose store by around 500 sq.m.

4.26 Together these two opportunities with vacant shop units could accommodate about 64% of the Lutterworth floorspace projection up to 2031 (2,800 sq.m gross).

Broughton Astley Village Centre

4.27 Within Broughton Astley Village Centre, development options appear to be limited and future focus is likely to be small scale intensification and extensions.

4.28 The existing petrol filling station/car sales site on Main Street has the potential to be redeveloped to provide 800 sq.m gross, which if implemented would be sufficient to meet Broughton Astley's floorspace projection up to 2031 (400 sq.m gross).

5.0 Review of Centre Boundaries

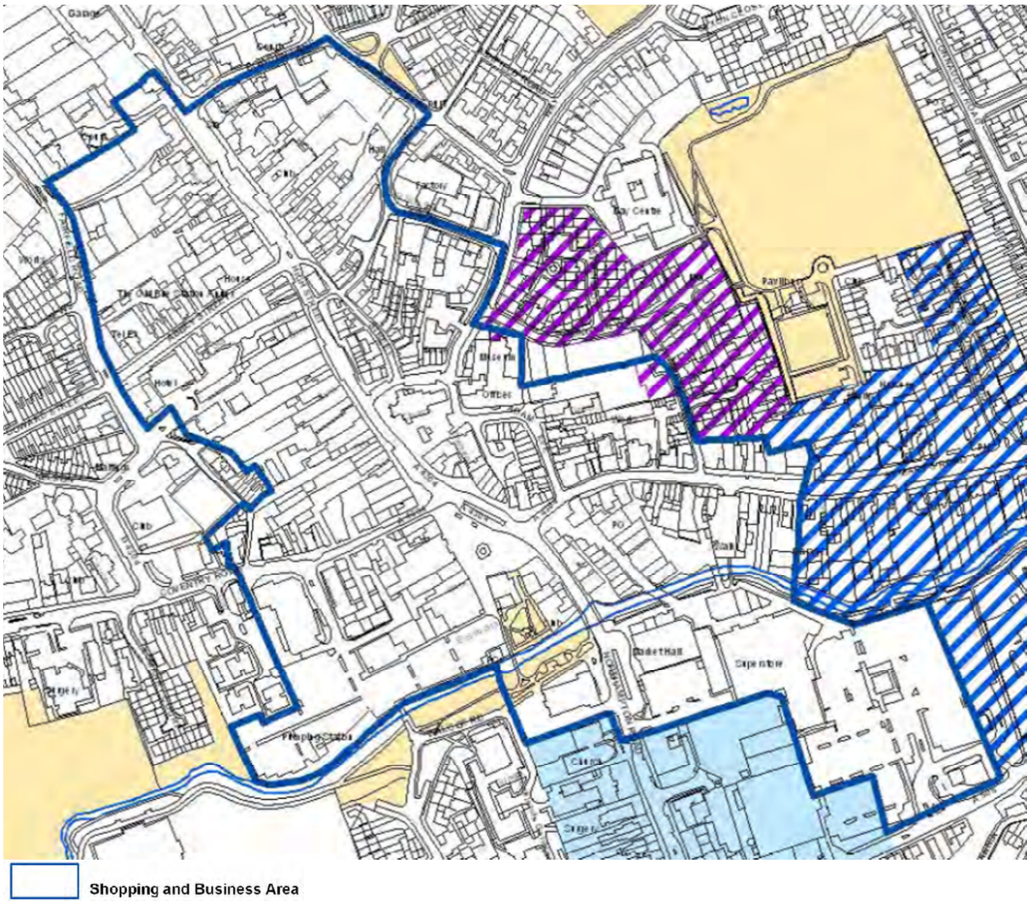
Introduction

5.1 This section reviews town centre boundary options within Harborough District.

5.2 Saved policies within the adopted Harborough District Local Plan (2007) includes one policy relating to shopping within the town centres. The Local Plan defines “Principal Shopping and Business Areas” within Market Harborough and Lutterworth town centres and Broughton Astley, Fleckney, Great Glen and Kibworth village centres. The Plan does not define primary or secondary retail frontages, nor does it define “town centre” boundaries.

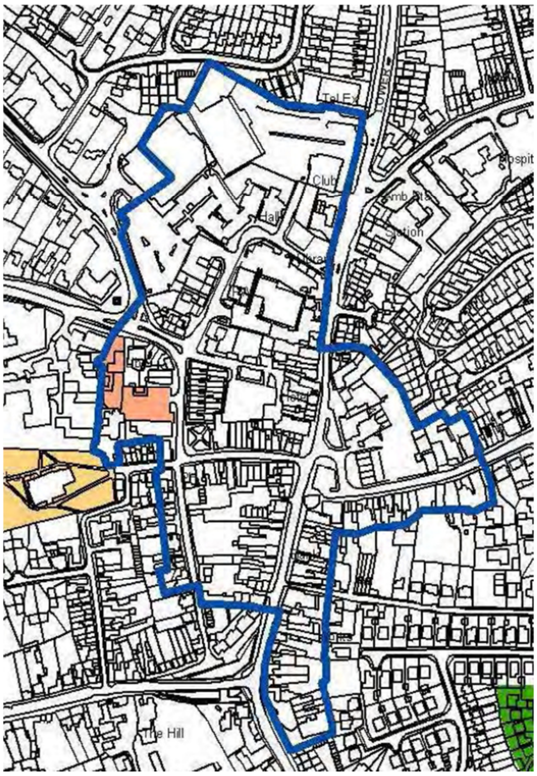
5.3 The Principal Shopping and Business Areas for the three main centres are shown below:

Figure 5.1 Market Harborough Principal Shopping and Business Area



Source: Harborough District Local Plan (2007)

Figure 5.2 Lutterworth Principal Shopping and Business Area



Source: Harborough District Local Plan 2007

Shopping and Business Area

Figure 5.3 Broughton Astley Principal Shopping and Business Area

Source: Harborough District Local Plan 2007

Shopping and Business Area

5.4 Core Strategy Policy CS6 relates to town centres and retailing and seeks to direct retail and other key town centre uses to the Principal Shopping and

Business Areas of the centres, followed by edge of town centre sites, consistent with the sequential approach (NPPF, para. 24).

5.5 The emerging policies within the Harborough Local Plan will need to define appropriate areas where retail and other main town centre will be directed, and for the application of the sequential approach.

Methodology

5.6 In undertaking this review, consideration has been given to definitions of the town centre and primary shopping area contained in the NPPF. In addition, consideration has been given to relevant national guidance contained in the Practice Guidance on Need, Impact and the Sequential Approach (December 2009) (Practice Guidance) and remains in force.

5.7 As set out in the NPPF (Annex 2) and Practice Guidance (paragraph 6.4), key factors in identifying the extent of the primary shopping area, and primary and secondary frontages comprise:

- composition of uses: the proportion of retail uses based upon the GOAD surveys of the town centres. Primary shopping frontages would comprise higher proportions of A1 retail uses than secondary shopping frontages;
- prime rental levels: analysis of Zone A rental levels of units within the centres sourced from Valuation Office (VOA) website, with primary shopping areas expected to achieve higher rental levels than elsewhere;
- pedestrian flows: level of pedestrian flows within particular areas of the centre identified from visits to the centre; and
- key anchor stores: the presence of key anchor stores such as department stores or food stores can also identify the extent of the Primary Shopping Area.

5.8 Annex 2 of the NPPF provides definitions of these designations, as follows:

Town centre: *Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.*

Primary shopping area: *Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).*

Primary Shopping Areas and Centre Boundaries

5.9 The designation of primary shopping areas or centre boundaries is important when applying the sequential approach and directing town centre uses/ development to appropriate locations.

5.10 The NPPF requires planning policies to be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. This includes defining the extent of town centres and primary shopping areas and allocating suitable sites for retail and other main town centre uses.

5.11 The NPPF indicates that the first preference for retail uses should be the primary shopping area. The first preference for leisure uses is normally the wider defined town centre, which usually includes the primary shopping area and other parts of the commercial centre.

5.12 The retail policies within both the saved Local Plan and Core Strategy define "Principal Shopping and Business Areas" only, and do not provide separate "town centre" and "primary shopping area" boundaries for any centre. The principal shopping and business area therefore acts as both the Town Centre and Primary Shopping Area.

5.13 Within large and medium sized centres town centre boundaries would usually extend beyond the main shopping areas of the centres. In these circumstances the designated primary shopping area is the sequentially preferable location for retail development, whilst the town centre boundary is the preferred location for other main town centre uses such as leisure and offices. All other town centres uses, including business and leisure, can be directed towards any site within the defined town centre. In the absence of separate town centre and primary shopping area boundaries, it is not possible to differentiate between retail and other town centre uses.

5.14 It would be beneficial for Market Harborough to have a separate town centre boundary given its size and role as the main town centre in the District. The defined Principal Shopping and Business Area as currently drawn extends beyond the primary and contiguous second shopping frontages.

5.15 Given the size of the other centres within Harborough District, it is not necessary to define separate town centre and primary shopping area boundaries. These centres do not have significant adjoining areas with other main town centre uses that extend significantly beyond the primary shopping areas and essentially the town centre boundary reflects the Principal Shopping and Business Area.

5.16 Suggested amendments to the designated boundaries of the main centres are set out below.

- **Market Harborough:**
  - Provide a town centre boundary which encompasses the principal shopping and business area and extend the boundary eastwards to include the Waitrose, Aldi and Lidl food stores, and St Mary's Road up to Clarence Street to the east. Main town centre uses will be focused in this area.
  - Within the town centre boundary define a separate primary shopping area, which excludes the Commons Car Park and Springfield Retail

Park Car Park. Retail uses will be focused in this primary shopping area and edge of centre sites for retail development will be measured from this primary shopping area, not the town centre boundary.

- **Lutterworth:** No change required.
- **Broughton Astley:** No change required.

5.17 Emerging policy should indicate that the first preference for the main town centre uses other than retail in Market Harborough will be the defined town centre boundary. Development outside of these areas will need to comply with the sequential approach and impact tests as set out in the NPPF. Within Market Harborough retail development outside the primary shopping area will need to comply with these tests.

5.18 It is appropriate to define boundaries for local centres, as identified in the Core Strategy. These boundaries should define the extent of the local centre, but given the small scale of the centres, it is not necessary or appropriate to define separate primary shopping areas.

5.19 Development plans may distinguish between primary and secondary frontages in town centres and consider their relative importance to the character of the centre. These frontage policies are often used to control the mix of uses in centres. Primary frontages are characterised by a high proportion of retail uses, while secondary frontages are areas of mixed commercial development.

5.20 The NPPF does not suggest that shopping frontage policies must be adopted in all town centres and it is our view this approach should only be considered in Market Harborough town centre.

6.0 Conclusions and Policy Recommendations

Introduction

6.1 This report provides an update of the District wide needs assessment for retail development in Harborough District. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs in Harborough District

6.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over the plan period up to 2031.

6.3 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

6.4 Long term forecasts up to and beyond 2026 may be more susceptible to change, due to unforeseen circumstances. Long term projections should be monitored and kept under review. The implications of major retail development within and surrounding the District should be monitored along with the effect proposals may have on the demand for additional development in Harborough District.

Retail Floorspace Projections

6.5 The quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new retail development within Harborough District. The convenience goods projections, based on constant markets shares, suggest new floorspace could be distributed as follows:

Table 6.1: Convenience Goods Retail Floorspace Projections (Gross)

Location	**Additional Retail Floorspace sq.m Gross**			
	2013 - 2021	**2021 - 2026**	**2026 - 2031**	**Total 2013 - 2031**
Market Harborough	2,000	800	800	**3,600**
Lutterworth	800	400	300	**1,500**
Broughton Astley	100	100	100	**300**
Other Harborough	100	300	300	**700**
Total	**3,000**	**1,600**	**1,500**	**6,100**

6.6 If a large food store is developed in Broughton Astley, resulting in an increase in the town's market share of expenditure, then the distribution of new convenience goods floorspace will be as follows:

Table 6.2: Redistributed Convenience Goods Retail Floorspace Projections (Gross)

Location	Additional Retail Floorspace sq.m Gross			
	2013 - 2021	2021 - 2026	2026 - 2031	Total 2013 - 2031
Market Harborough	2,000	800	800	**3,600**
Lutterworth	200	300	300	**800**
Broughton Astley	1,600	200	100	**1,900**
Other Harborough	100	300	300	**700**
Total	**3,900**	**1,600**	**1,500**	**7,000**

6.7 The comparison goods projections, based on constant markets shares, suggest new floorspace could be distributed as follows:

Table 6.3: Comparison Goods Retail Floorspace Projections (Gross)

Location	Additional Retail Sales Floorspace sq.m Gross			
	2013 - 2021	2021 - 2026	2026 - 2031	Total 2013 - 2031
Market Harborough	1,900	2,200	2,200	**6,300**
Lutterworth	300	300	300	**900**
Broughton Astley	-	50	0	**50**
Other Harborough	100	50	100	**250**
Total	**2,300**	**2,600**	**2,600**	**7,500**

Strategy Recommendations

Market Harborough Town Centre

6.8 The retail floorspace capacity projection is around 11,400 sq.m gross of additional Class A1 to A5 floorspace in Market Harborough up to 2031.

6.9 Vacant shop units can only accommodate a small element of this floorspace projection. The short to medium term priority should be to explore the redevelopment potential of the Commons car park site, Springfield Retail Park car park (east side) and the land between School Lane and the High Street. If delivered these sites and vacant shop units could meet just over half of the floorspace projection up to 2031.

6.10 In the longer term (after 2021) consideration could be given to releasing some edge of centre sites along St. Mary's Road towards the railway station, e.g. the former Travis Perkin's site and land on the Kettering Road junction.

Lutterworth Town Centre

6.11 The retail floorspace capacity projection is around 2,800 sq.m gross of additional Class A1 to A5 floorspace in Lutterworth up to 2031. This projection reduces to 2,100 sq.m gross if a food store is developed in Broughton Astley.

6.12 Vacant shop units in Lutterworth can only accommodate a small element of this projection. The short to medium term priority should be to explore the redevelopment potential of land at Bank Street and the possible extension of the Waitrose store. If delivered these two sites and vacant shop units could meet around two thirds of the floorspace projection up to 2031, or over 85% if a food store is developed at Broughton Astley.

Broughton Astley Village Centre

6.13 Based on existing market shares, there is limited retail capacity for additional facilities in Broughton Astley up to 2031, i.e. 400 sq.m gross of Class A1 to A5. Vacant shop units and small scale extensions/infill development could meet this projection over the plan period.

6.14 If Broughton Astley increased its relatively low market share of retail expenditure there could be potential for larger scale development. The benefits of larger scale development would need to be carefully considered against the potential impact on the village centre.

Scale of Retail Development

6.15 Development should be appropriate in terms of scale and nature to the centre in which it is located. The NPPF states that, when assessing applications for retail, leisure and office development outside of town centres which are not in accordance with an up to date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold. If there is no locally set threshold, the default threshold is 2,500 sq.m gross.

6.16 The CLG Practice Guidance states (para. 7.5) that where authorities decide not to set out specific floorspace thresholds in local development plans, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500 sq.m gross. The Guidance acknowledges that it may occasionally be relevant to consider the impact of proposals below this floorspace threshold, for example if they are large developments when compared with a the size of a nearby centre, or likely to have a disproportionate effect or ‘tip the balance’ of a vulnerable centre.

6.17 If the NPPF threshold was adopted, then a single development proposal could exceed the entire short to medium term floorspace projections for towns in the District without the need for a retail impact assessment. Proposals that significantly exceed the floorspace projections for each town is likely to significantly reduce the turnover of existing floorspace and this impact should be carefully tested on a case by case basis.

6.18 The NPPF threshold of 2,500 sq.m gross is inappropriate as a blanket threshold within Harborough District, as this scale of development would represent a significant proportion of the overall retail projections in the authority area. Development smaller than 2,500 sq.m gross could have a significant adverse impact on the smaller town centres. Accordingly, the following thresholds are recommended for all retail development outside the primary shopping area:

- 1,500 sq.m gross for Market Harborough; and
- 500 sq.m gross elsewhere.

6.19 As the main town centre in the District, a higher threshold is suggested in Market Harborough, because the retail floorspace projections are much higher. The floorspace projections for Market Harborough suggest retail development of less than 2,500 sq.m gross could have significant impact. The short to medium term projection (up to 2021) is 2,000 sq.m gross for convenience goods and 1,900 sq.m gross for comparison goods. Based on these projections an impact threshold of 1,500 sq,m gross is considered appropriate in Market Harborough

6.20 For the other small centres, proposals of over 500 sq.m gross will be of greater significance and therefore should be subject to some form of impact assessment.

6.21 If considered appropriate, the Council could include these recommended thresholds within a retail policy at part of the new Local Plan as locally set thresholds for requiring impact assessments for retail proposals outside of town centres and not in accordance with an up to date Local Plan, as set out in para. 26 of the NPPF.

Future Strategy Implementation and Monitoring

6.22 There are a number of broad areas of possible action the Council could pursue in order to maintain and enhance the role of shopping centres within the District, as follows:

- application of guidance within the NPPF, particularly relating to the sequential approach and impact tests for local set thresholds in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
- improving the range and choice of shops and services in all centres (where appropriate in terms of scale) by encouraging intensification, development and the re-occupation of vacant premises, and continuing to promote the centres;
- maintaining the generally high quality environment within each centre; and
- bring forward development opportunities in Market Harborough and Lutterworth through the Local Plan process to improve the availability of modern premises suitable for new occupiers.

6.23 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development up to 2016, with longer term forecast up to 2021, 2026 and 2031. Projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available, in particular longer-term projections up to 2031 should be treated with caution.

6.24 Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities (floorspace surveys and turnover data from Management Horizons, Retail Rankings); and
- implemented development within and around the study area.

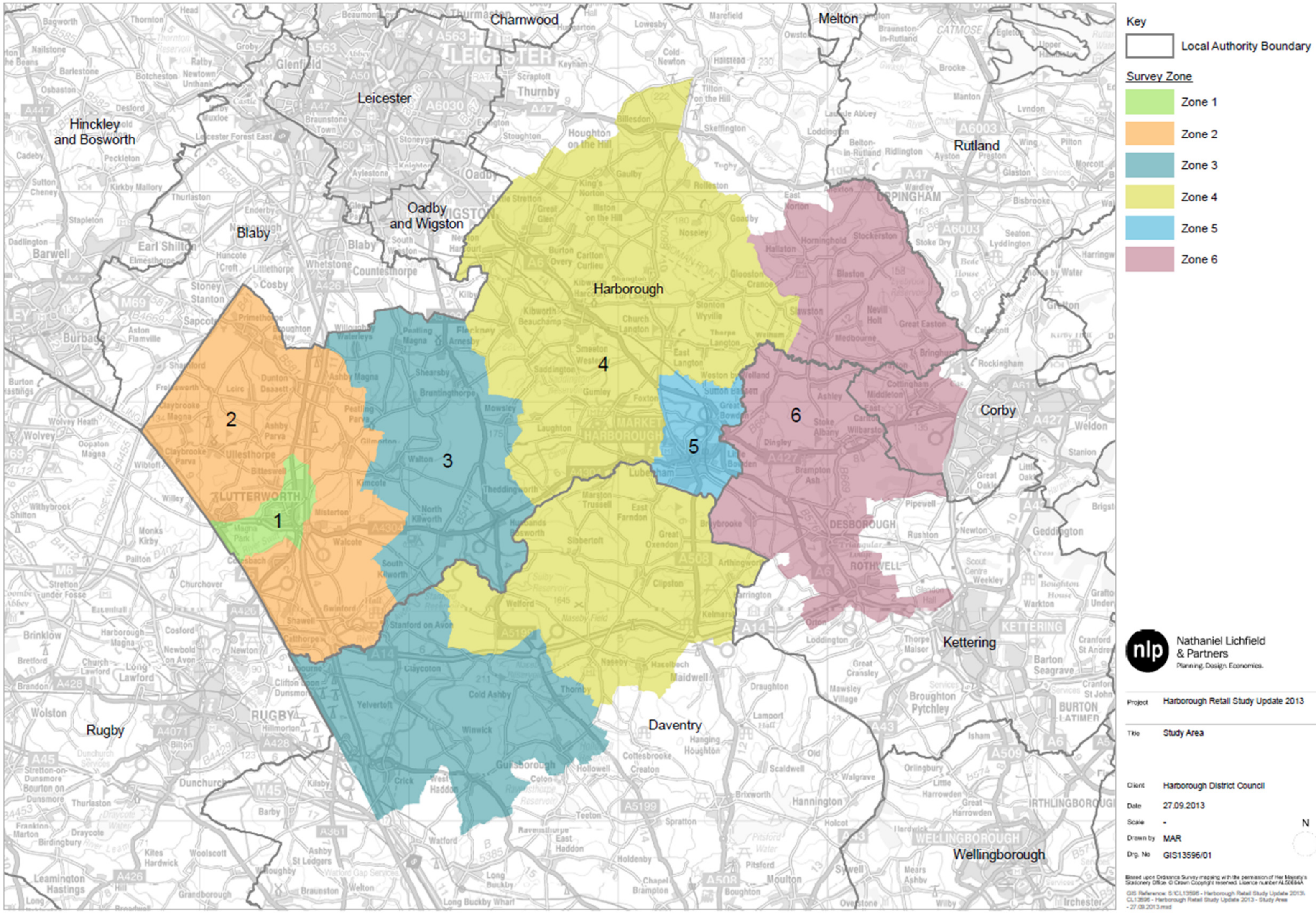
6.25 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections.

Appendix 1 Study Area and Methodology

Harborough Study Area Zones

Zone	Wards	Local Authority
1	Lutterworth Brookfield	Harborough
	Lutterworth Orchard	Harborough
	Lutterworth Springs	Harborough
	Lutterworth Swift	Harborough
2	Broughton Astley- Astley	Harborough
	Broughton Astley- Broughton	Harborough
	Broughton Astley- Primethorpe	Harborough
	Broughton Astley- Sutton	Harborough
	Dunton	Harborough
	Misterton	Harborough
	Ullesthorpe	Harborough
3	Bosworth	Harborough
	Peatling	Harborough
	Crick	Daventry
	West Haddon and Guilsborough	Davenry
	Yelvertoft	Daventry
4	Fleckney	Harborough
	Kiborth	Harborough
	Lubenham	Harborough
	Billesdon	Harborough
	Glen	Harborough
	Clipston	Daventry
	Welford	Daventry
5	Market Harborough- Great Bowden and Arden	Harborough
	Market Harborough – Little Bowden	Harborough
	Market Harborough- Logan	Harborough
	Market Harborough – Welland	Harborough
6	Rural West	Corby
	Loatland	Kettering
	St Giles	Kettering
	Tresham	Kettering
	Trinity	Kettering
	Welland	Kettering
	Nevill	Harborough

Plan 1


Charnwood
Melton
Leicester
Hinckley and Bosworth
Rutland
Blaby
Oadby and Wigston
Harborough
Corby
Kettering
Daventry
Rugby
Wellingborough
1
2
3
4
5
6
Key
Local Authority Boundary
Survey Zone
Zone 1
Zone 2
Zone 3
Zone 4
Zone 5
Zone 6
Nathaniel Lichfield & Partners
Planning. Design. Economics.
Project Harborough Retail Study Update 2013
Title Study Area
Client Harborough District Council
Date 27.09.2013
Scale -
Drawn by MAR
Drg. No GIS13596/01
N

Retail Capacity Assessment – Methodology and Data

Price Base

1 All monetary values expressed in this study are at 2011 prices, consistent with Experian's base year expenditure figures for 2011 (Retail Planner Briefing Note 11) which is the most up to date information available.

Study Area

2 The quantitative analysis is based on a defined study area that covers the catchment areas of the main shopping destinations in Harborough District. The study area is sub-divided into six zones based on postal sector boundaries as shown above. The survey zones take into consideration the extent of the catchment area of the main centres in Harborough District.

Retail Expenditure

3 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2011 have been obtained.

4 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 11, September 2013) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

5 Experian's EBS growth forecast rates for 2011 to 2015 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: -0.6% for 2011-2012, -0.6% for 2012-2013, -0.3% for 2013 to 2014 and +0.1% for 2014 to 2015; for comparison goods: 3.1% for 2011-2012, 3.2% for 2012-2013, 2.3% for 2013-2014 and 2.8% for 2014-2015).

6 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted i.e. 0.8% per annum for convenience goods after 2015 and 2.9% per annum growth for comparison goods. These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

7 Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2011 is:

- 6.2% of convenience goods expenditure; and
- 13.0% of comparison goods expenditure.

8 Experian predicts that these figures will increase in the future, up to 20% by the end of the 2020s. However, Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2011 are:

- 1.9% of convenience goods expenditure; and
- 9.7% of comparison goods expenditure.

9 The projections provided by Experian suggest that these percentages could increase to 3.8% and 14.5% by 2018, and estimated at 5.6% and 16% by 2030. These figures have been adopted in this assessment.

10 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the Internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

11 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector, but Experian's projections suggest this growth will level off by 2016/17.

12 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales may

not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

Market Shares/Penetration Rates

13 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the August 2013 household survey.

14 The total turnover of shops within the District is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Verdict (UK Food and Grocery Retailers) and Mintel Retail Rankings information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Benchmark Turnover Levels

15 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

16 The estimated convenience goods sales areas have been derived from a combination of the Institute of Grocery Distribution (IGD), GOAD plans, Valuation Office data and NLP estimates based on site visits. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.

17 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within the District and our experience of trading levels of small independent shops informed by household shopper surveys elsewhere, we have adopted an average sales density of £4,500 per sq.m net for convenience shops/stores in the study area. This is consistent with NLP's experience of retail studies across the country. The total benchmark turnover of identified convenience sales floorspace within Harborough District is £119.58 million (Table 10, Appendix 2).

18 Mintel's Retail Rankings provides company average sales density information for a selection of national comparison retailers. This data suggests a notional average sales density for national high street comparison retailers of around £5,000 per sq.m net. For retail warehouse operators the average sales density is generally lower at around £2,500 per sq.m net.

Appendix 2 Convenience Goods Capacity

Table 1: Study Area Population Projections

Total Population	2011	2013	2016	2021	2026	2031
Zone 1 - Lutterworth Urban	9,353	9,511	9,747	10,186	10,600	10,954
Zone 2 - Lutterworth Rural	16,008	16,278	16,683	17,434	18,142	18,748
Zone 3 - Kilworth	10,976	11,161	11,439	11,954	12,439	12,855
Zone 4 - Market Harborough Rural West	24,956	25,377	26,008	27,180	28,282	29,228
Zone 5 - Market Harborough Urban	22,911	23,297	23,877	24,952	25,965	26,833
Zone 6 - Market Harborough Rural East	24,464	24,877	25,496	26,644	27,725	28,651
Total	**108,668**	**110,501**	**113,251**	**118,351**	**123,153**	**127,269**

Sources:
Experian 2011 - 2011 Census
GL Hearn Harborough Housing Requirements Study March 2013 - Projection 1 (SNPP)
Assumes 405 dwellings per annum between 2011 and 2031 - HDC population increases from 85,699 to 100,368

Table 2: Convenience Goods Expenditure (£ per person per annum)

	2013	2016	2021	2026	2031
Zone 1 - Lutterworth Urban	1,988	1,986	2,037	2,108	2,182
Zone 2 - Lutterworth Rural	2,022	2,020	2,071	2,144	2,219
Zone 3 - Kilworth	2,141	2,139	2,194	2,271	2,351
Zone 4 - Market Harborough Rural West	2,023	2,020	2,072	2,145	2,221
Zone 5 - Market Harborough Urban	1,871	1,868	1,916	1,984	2,053
Zone 6 - Market Harborough Rural East	1,866	1,864	1,911	1,979	2,048

Sources:
Experian 2011
Data in 2011 prices
Experian Growth Rates
Excludes Special Forms of Trading

Table 3: Total Convenience Goods Expenditure (£m)

	2013	2016	2021	2026	2031
Zone 1 - Lutterworth Urban	18.91	19.36	20.75	22.35	23.91
Zone 2 - Luuerworth Rural	32.91	33.69	36.11	38.90	41.61
Zone 3 - Kilworth	23.90	24.47	26.22	28.25	30.22
Zone 4 - Market Harborough Rural West	51.34	52.55	56.32	60.67	64.90
Zone 5 - Market Harborough Urban	43.58	44.61	47.82	51.51	55.10
Zone 6 - Market Harborough Rural East	46.42	47.52	50.93	54.86	58.68
Total	**217.07**	**222.19**	**238.14**	**256.53**	**274.42**

Source: Tables 1 and 2

Table 4: Base Year Convenience Goods Market Shares 2013 (%)

Centre/Facility	Zone 1 Lutterworth Urban	Zone 2 Lutterworth Rural	Zone 3 Kilworth	Zone 4 M.Harborough Rural West	Zone 5 M.Harborough Urban	Zone 6 M.Harborough Rural East	% Inflow
Sainsbury's , Market Harborough	0.0%	0.3%	8.0%	16.0%	35.4%	15.3%	5.0%
Waitrose, Market Harborough	0.0%	0.0%	2.7%	6.5%	10.9%	6.5%	5.0%
Aldi, Market Harborough	0.0%	0.0%	3.3%	4.5%	16.9%	4.5%	5.0%
Other Market Harborough	0.0%	0.4%	3.8%	11.9%	27.1%	5.3%	5.0%
Sub-Total	**0.0%**	**0.7%**	**17.8%**	**38.9%**	**90.3%**	**31.6%**	
Morrison's, Lutterworth	53.4%	23.8%	15.7%	0.2%	0.0%	0.0%	5.0%
Waitrose, Lutterworth	19.6%	11.6%	9.3%	0.6%	0.0%	0.0%	5.0%
Other Lutterworth	6.3%	4.3%	2.0%	0.0%	0.0%	0.0%	5.0%
Sub-Total	**79.3%**	**39.7%**	**27.0%**	**0.8%**	**0.0%**	**0.0%**	
Broughton Astley	0.0%	18.0%	0.6%	0.0%	0.0%	0.3%	5.0%
Fleckney	0.0%	0.0%	1.1%	5.2%	0.0%	0.0%	5.0%
Great Glen	0.0%	0.0%	0.0%	5.0%	0.0%	0.0%	5.0%
Kibworth	0.0%	0.0%	0.5%	6.6%	0.2%	0.0%	5.0%
Other Harborough	0.0%	1.3%	2.2%	0.8%	0.0%	0.0%	5.0%
Harborough Total	**79.3%**	**59.7%**	**49.2%**	**57.3%**	**90.5%**	**31.9%**	
Corby	0.2%	1.0%	0.5%	2.0%	4.6%	13.8%	n/a
Kettering	0.0%	0.0%	0.0%	1.5%	2.9%	46.2%	n/a
Leicester/Wigston	4.2%	27.7%	6.5%	36.7%	1.8%	0.6%	n/a
Rugby	14.5%	3.5%	32.1%	0.1%	0.0%	0.0%	n/a
Other outside Harborough	1.8%	8.1%	11.7%	2.4%	0.2%	7.5%	n/a
Grand Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey, August 2013

Table 5: Base Year Convenience Goods Expenditure Patterns 2013 (£m)

Centre/Facility	Zone 1 Lutterworth Urban	Zone 2 Lutterworth Rural	Zone 3 Kilworth	Zone 4 M.Harborough Rural West	Zone 5 M.Harborough Urban	Zone 6 M.Harborough Rural East	% Inflow	Total
Expenditure 2013	**18.91**	**32.91**	**23.90**	**51.34**	**43.58**	**46.42**		**217.07**
Sainsbury's, Market Harborough	0.00	0.10	1.91	8.21	15.43	7.10	1.72	34.48
Waitrose, Market Harborough	0.00	0.00	0.65	3.34	4.75	3.02	0.62	12.37
Aldi, Market Harborough	0.00	0.00	0.79	2.31	7.37	2.09	0.66	13.21
Other Market Harborough	0.00	0.13	0.91	6.11	11.81	2.46	1.13	22.55
Sub-Total	**0.00**	**0.23**	**4.25**	**19.97**	**39.36**	**14.67**	**4.13**	**82.61**
Morrison's, Lutterworth	10.10	7.83	3.75	0.10	0.00	0.00	1.15	22.93
Waitrose, Lutterworth	3.71	3.82	2.22	0.31	0.00	0.00	0.53	10.58
Other Lutterworth	1.19	1.42	0.48	0.00	0.00	0.00	0.16	3.25
Sub-Total	**15.00**	**13.07**	**6.45**	**0.41**	**0.00**	**0.00**	**1.84**	**36.77**
Broughton Astley	0.00	5.92	0.14	0.00	0.00	0.14	0.33	6.53
Fleckney	0.00	0.00	0.26	2.67	0.00	0.00	0.15	3.09
Great Glen	0.00	0.00	0.00	2.57	0.00	0.00	0.14	2.70
Kibworth	0.00	0.00	0.12	3.39	0.09	0.00	0.19	3.78
Other Harborough	0.00	0.43	0.53	0.41	0.00	0.00	0.07	1.44
Sub-Total	**0.00**	**6.35**	**1.05**	**9.04**	**0.09**	**0.14**	**0.88**	**17.54**
Harborough Total	**15.00**	**19.65**	**11.76**	**29.42**	**39.44**	**14.81**	**6.85**	**136.92**
Corby	0.04	0.33	0.12	1.03	2.00	6.41	n/a	9.92
Kettering	0.00	0.00	0.00	0.77	1.26	21.45	n/a	23.48
Leicester/Wigston	0.79	9.12	1.55	18.84	0.78	0.28	n/a	31.37
Rugby	2.74	1.15	7.67	0.05	0.00	0.00	n/a	11.62
Other outside Harborough	0.34	2.67	2.80	1.23	0.09	3.48	n/a	10.60
Grand Total	**18.91**	**32.91**	**23.90**	**51.34**	**43.58**	**46.42**	**6.85**	**223.91**

Source: Tables 3 and 4

Table 6: Projected Convenience Goods Expenditure Patterns 2016 (£m)

Centre/Facility	Zone 1 Lutterworth Urban	Zone 2 Lutterworth Rural	Zone 3 Kilworth	Zone 4 M.Harborough Rural West	Zone 5 M.Harborough Urban	Zone 6 M.Harborough Rural East	% Inflow	Total
Expenditure 2016	**19.36**	**33.69**	**24.47**	**52.55**	**44.61**	**47.52**		**222.19**
Sainsbury's, Market Harborough	0.00	0.10	1.96	8.41	15.79	7.27	1.76	35.29
Waitrose, Market Harborough	0.00	0.00	0.66	3.42	4.86	3.09	0.63	12.66
Aldi, Market Harborough	0.00	0.00	0.81	2.36	7.54	2.14	0.68	13.53
Other Market Harborough	0.00	0.13	0.93	6.25	12.09	2.52	1.15	23.08
Sub-Total	**0.00**	**0.24**	**4.35**	**20.44**	**40.29**	**15.01**	**4.23**	**84.56**
Morrison's, Lutterworth	10.34	8.02	3.84	0.11	0.00	0.00	1.17	23.48
Waitrose, Lutterworth	3.79	3.91	2.28	0.32	0.00	0.00	0.54	10.83
Other Lutterworth	1.22	1.45	0.49	0.00	0.00	0.00	0.17	3.32
Sub-Total	**15.35**	**13.38**	**6.61**	**0.42**	**0.00**	**0.00**	**1.88**	**37.63**
Broughton Astley	0.00	6.06	0.15	0.00	0.00	0.14	0.33	6.69
Fleckney	0.00	0.00	0.27	2.73	0.00	0.00	0.16	3.16
Great Glen	0.00	0.00	0.00	2.63	0.00	0.00	0.14	2.77
Kibworth	0.00	0.00	0.12	3.47	0.09	0.00	0.19	3.87
Other Harborough	0.00	0.44	0.54	0.42	0.00	0.00	0.07	1.47
Sub-Total	**0.00**	**6.50**	**1.08**	**9.25**	**0.09**	**0.14**	**0.90**	**17.96**
Harborough Total	**15.35**	**20.11**	**12.04**	**30.11**	**40.38**	**15.16**	**7.01**	**140.15**
Corby	0.04	0.34	0.12	1.05	2.05	6.56	n/a	10.16
Kettering	0.00	0.00	0.00	0.79	1.29	21.95	n/a	24.03
Leicester/Wigston	0.81	9.33	1.59	19.29	0.80	0.29	n/a	32.11
Rugby	2.81	1.18	7.85	0.05	0.00	0.00	n/a	11.89
Other outside Harborough	0.35	2.73	2.86	1.26	0.09	3.56	n/a	10.85
Grand Total	**19.36**	**33.69**	**24.47**	**52.55**	**44.61**	**47.52**	**7.01**	**229.20**

Source: Tables 3 and 4

Table 7: Projected Convenience Goods Expenditure Patterns 2021 (£m)

Centre/Facility	Zone 1 Lutterworth Urban	Zone 2 Lutterworth Rural	Zone 3 Kilworth	Zone 4 M.Harborough Rural West	Zone 5 M.Harborough Urban	Zone 6 M.Harborough Rural East	% Inflow	Total
Expenditure 2021	**20.75**	**36.11**	**26.22**	**56.32**	**47.82**	**50.93**		**238.14**
Sainsbury's, Market Harborough	0.00	0.11	2.10	9.01	16.93	7.79	1.89	37.83
Waitrose, Market Harborough	0.00	0.00	0.71	3.66	5.21	3.31	0.68	13.57
Aldi, Market Harborough	0.00	0.00	0.87	2.53	8.08	2.29	0.72	14.50
Other Market Harborough	0.00	0.14	1.00	6.70	12.96	2.70	1.24	24.74
Sub-Total	**0.00**	**0.25**	**4.67**	**21.91**	**43.18**	**16.09**	**4.53**	**90.63**
Morrison's, Lutterworth	11.08	8.59	4.12	0.11	0.00	0.00	1.26	25.16
Waitrose, Lutterworth	4.07	4.19	2.44	0.34	0.00	0.00	0.58	11.61
Other Lutterworth	1.31	1.55	0.52	0.00	0.00	0.00	0.18	3.56
Sub-Total	**16.45**	**14.34**	**7.08**	**0.45**	**0.00**	**0.00**	**2.02**	**40.33**
Broughton Astley	0.00	6.50	0.16	0.00	0.00	0.15	0.36	7.17
Fleckney	0.00	0.00	0.29	2.93	0.00	0.00	0.17	3.39
Great Glen	0.00	0.00	0.00	2.82	0.00	0.00	0.15	2.96
Kibworth	0.00	0.00	0.13	3.72	0.10	0.00	0.21	4.15
Other Harborough	0.00	0.47	0.58	0.45	0.00	0.00	0.08	1.58
Sub-Total	**0.00**	**6.97**	**1.15**	**9.91**	**0.10**	**0.15**	**0.96**	**19.25**
Harborough Total	**16.45**	**21.56**	**12.90**	**32.27**	**43.27**	**16.25**	**7.51**	**150.21**
Corby	0.04	0.36	0.13	1.13	2.20	7.03	n/a	10.89
Kettering	0.00	0.00	0.00	0.84	1.39	23.53	n/a	25.76
Leicester/Wigston	0.87	10.00	1.70	20.67	0.86	0.31	n/a	34.41
Rugby	3.01	1.26	8.42	0.06	0.00	0.00	n/a	12.75
Other outside Harborough	0.37	2.92	3.07	1.35	0.10	3.82	n/a	11.63
Grand Total	**20.75**	**36.11**	**26.22**	**56.32**	**47.82**	**50.93**	**7.51**	**245.65**

Source: Tables 3 and 4

Table 8: Projected Convenience Goods Expenditure Patterns 2026 (£m)

Centre/Facility	Zone 1 Lutterworth Urban	Zone 2 Lutterworth Rural	Zone 3 Kilworth	Zone 4 M.Harborough Rural West	Zone 5 M.Harborough Urban	Zone 6 M.Harborough Rural East	% Inflow	Total
Expenditure 2026	**22.35**	**38.90**	**28.25**	**60.67**	**51.51**	**54.86**		**256.53**
Sainsbury's, Market Harborough	0.00	0.12	2.26	9.71	18.23	8.39	2.04	40.75
Waitrose, Market Harborough	0.00	0.00	0.76	3.94	5.61	3.57	0.73	14.62
Aldi, Market Harborough	0.00	0.00	0.93	2.73	8.70	2.47	0.78	15.62
Other Market Harborough	0.00	0.16	1.07	7.22	13.96	2.91	1.33	26.65
Sub-Total	**0.00**	**0.27**	**5.03**	**23.60**	**46.51**	**17.33**	**4.88**	**97.63**
Morrison's, Lutterworth	11.93	9.26	4.43	0.12	0.00	0.00	1.36	27.10
Waitrose, Lutterworth	4.38	4.51	2.63	0.36	0.00	0.00	0.63	12.51
Other Lutterworth	1.41	1.67	0.56	0.00	0.00	0.00	0.19	3.84
Sub-Total	**17.72**	**15.44**	**7.63**	**0.49**	**0.00**	**0.00**	**2.17**	**43.45**
Broughton Astley	0.00	7.00	0.17	0.00	0.00	0.16	0.39	7.72
Fleckney	0.00	0.00	0.31	3.15	0.00	0.00	0.18	3.65
Great Glen	0.00	0.00	0.00	3.03	0.00	0.00	0.16	3.19
Kibworth	0.00	0.00	0.14	4.00	0.10	0.00	0.22	4.47
Other Harborough	0.00	0.51	0.62	0.49	0.00	0.00	0.08	1.70
Sub-Total	**0.00**	**7.51**	**1.24**	**10.68**	**0.10**	**0.16**	**1.04**	**20.73**
Harborough Total	**17.72**	**23.22**	**13.90**	**34.76**	**46.61**	**17.50**	**8.09**	**161.81**
Corby	0.04	0.39	0.14	1.21	2.37	7.57	n/a	11.73
Kettering	0.00	0.00	0.00	0.91	1.49	25.34	n/a	27.75
Leicester/Wigston	0.94	10.77	1.84	22.27	0.93	0.33	n/a	37.07
Rugby	3.24	1.36	9.07	0.06	0.00	0.00	n/a	13.73
Other outside Harborough	0.40	3.15	3.30	1.46	0.10	4.11	n/a	12.53
Grand Total	**22.35**	**38.90**	**28.25**	**60.67**	**51.51**	**54.86**	**8.09**	**264.62**

Source: Tables 3 and 4

Table 9: Projected Convenience Goods Expenditure Patterns 2031 (£m)

Centre/Facility	Zone 1 Lutterworth Urban	Zone 2 Lutterworth Rural	Zone 3 Kilworth	Zone 4 M.Harborough Rural West	Zone 5 M.Harborough Urban	Zone 6 M.Harborough Rural East	% Inflow	Total
Expenditure 2031	**23.91**	**41.61**	**30.22**	**64.90**	**55.10**	**58.68**		**274.42**
Sainsbury's, Market Harborough	0.00	0.12	2.42	10.38	19.51	8.98	2.18	43.59
Waitrose, Market Harborough	0.00	0.00	0.82	4.22	6.01	3.81	0.78	15.64
Aldi, Market Harborough	0.00	0.00	1.00	2.92	9.31	2.64	0.84	16.71
Other Market Harborough	0.00	0.17	1.15	7.72	14.93	3.11	1.43	28.51
Sub-Total	**0.00**	**0.29**	**5.38**	**25.25**	**49.76**	**18.54**	**5.22**	**104.44**
Morrison's, Lutterworth	12.77	9.90	4.74	0.13	0.00	0.00	1.45	28.99
Waitrose, Lutterworth	4.69	4.83	2.81	0.39	0.00	0.00	0.67	13.38
Other Lutterworth	1.51	1.79	0.60	0.00	0.00	0.00	0.21	4.11
Sub-Total	**18.96**	**16.52**	**8.16**	**0.52**	**0.00**	**0.00**	**2.32**	**46.48**
Broughton Astley	0.00	7.49	0.18	0.00	0.00	0.18	0.41	8.26
Fleckney	0.00	0.00	0.33	3.37	0.00	0.00	0.20	3.90
Great Glen	0.00	0.00	0.00	3.25	0.00	0.00	0.17	3.42
Kibworth	0.00	0.00	0.15	4.28	0.11	0.00	0.24	4.78
Other Harborough	0.00	0.54	0.66	0.52	0.00	0.00	0.09	1.82
Sub-Total	**0.00**	**8.03**	**1.33**	**11.42**	**0.11**	**0.18**	**1.11**	**22.18**
Harborough Total	**18.96**	**24.84**	**14.87**	**37.19**	**49.87**	**18.72**	**8.65**	**173.10**
Corby	0.05	0.42	0.15	1.30	2.53	8.10	n/a	12.55
Kettering	0.00	0.00	0.00	0.97	1.60	27.11	n/a	29.68
Leicester/Wigston	1.00	11.53	1.96	23.82	0.99	0.35	n/a	39.66
Rugby	3.47	1.46	9.70	0.06	0.00	0.00	n/a	14.69
Other outside Harborough	0.43	3.37	3.54	1.56	0.11	4.40	n/a	13.41
Grand Total	**23.91**	**41.61**	**30.22**	**64.90**	**55.10**	**58.68**	**8.65**	**283.08**

Source: Tables 3 and 4

Table 10: Convenience Goods Floorspace and Benchmark Turnover, 2013

Town/Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Market Harborough					
Sainsbury's , Market Harborough TC	2,263	80%	1,810	£12,537	£22.70
Waitrose, Market Harborough TC	1,543	90%	1,389	£11,818	£16.41
Aldi, Market Harborough	929	85%	790	£7,731	£6.10
Co-op, Market Harborough	1,029	85%	875	£7,496	£6.56
Lidl, Market Harborough	929	85%	790	£3,949	£3.12
B&M, Market Harborough	450	20%	90	£6,000	£0.54
Tesco Express, Rockingham Rd.	280	95%	266	£11,126	£2.96
Londis, Western Ave. Market Harborough	224	95%	213	£6,000	£1.28
Spar,Coventry Road, Market Harborough	170	95%	162	£6,000	£0.97
Tesco Metro, Market Harborough TC	556	90%	500	£11,126	£5.57
Majestic Wine	260	100%	260	£4,500	£1.17
Other Market Harborough	1,400	95%	1,330	£4,500	£5.99
Sub-Total	**10,033**		**8,474**		**£73.36**
Lutterworth					
Morrison's, Lutterworth	1,672	85%	1,421	£12,431	£17.67
Co-op, George St, Lutterworth	724	90%	652	£7,496	£4.88
Waitrose, Lutterworth	826	90%	743	£11,818	£8.79
Other Lutterworth	500	95%	475	£4,500	£2.14
Sub-Total	**3,722**		**3,291**		**£33.47**
Other Harborough					
Co-op, Broughton Astley	596	95%	566	£7,496	£4.24
Spar, Broughton Astley	140	95%	133	£6,000	£0.80
Other Broughton Astley	200	95%	190	£4,500	£0.86
Co-op, Fleckney	540	95%	513	£7,496	£3.85
Other Fleckney	50	95%	48	£4,500	£0.21
Co-op, Great Glen	203	95%	193	£7,496	£1.45
Co-op, Kibworth	600	95%	570	£7,496	£4.27
Other Kibworth	100	95%	95	£4,500	£0.43
Sub-Total	**2,429**		**2,308**		**£16.10**
Total	**16,184**		**14,073**	**£8,736**	**£122.93**

Source: IGD, Valuation Office, Goad and NLP site surveys 2013

Table 11: Summary of Convenience Goods Floorspace Capacity 2013 to 2031

Centre	2013	2016	2021	2026	2031
Available Expenditure in District (£m)					
Market Harborough	82.61	84.56	90.63	97.63	104.44
Lutterworth	36.77	37.63	40.33	43.45	46.48
Broughton Astley	6.53	6.69	7.17	7.72	8.26
Fleckney	3.09	3.16	3.39	3.65	3.90
Great Glen	2.70	2.77	2.96	3.19	3.42
Kibworth	3.78	3.87	4.15	4.47	4.78
Other Harborough	1.44	1.47	1.58	1.70	1.82
Total	**136.92**	**140.15**	**150.21**	**161.81**	**173.10**
Benchmark Turnover of Existing Facilities (£m)					
Market Harborough	73.36	73.36	73.36	73.36	73.36
Lutterworth	33.47	33.47	33.47	33.47	33.47
Broughton Astley	5.90	5.90	5.90	5.90	5.90
Fleckney	4.06	4.06	4.06	4.06	4.06
Great Glen	1.45	1.45	1.45	1.45	1.45
Kibworth	4.70	4.70	4.70	4.70	4.70
Other Harborough	1.44	1.44	1.44	1.44	1.44
Total	**124.37**	**124.37**	**124.37**	**124.37**	**124.37**
Surplus/Deficit Expenditure (£m)					
Market Harborough	9.26	11.21	17.28	24.27	31.08
Lutterworth	3.29	4.16	6.86	9.97	13.01
Broughton Astley	0.64	0.79	1.27	1.82	2.36
Fleckney	-0.97	-0.90	-0.67	-0.41	-0.16
Great Glen	1.26	1.32	1.52	1.75	1.97
Kibworth	-0.92	-0.83	-0.55	-0.23	0.08
Other Harborough	0.00	0.03	0.14	0.26	0.38
Total	**12.55**	**15.78**	**25.84**	**37.44**	**48.73**
Turnover Density New Floorspace (£ per sq.m)					
Large food stores	£12,309	£12,309	£12,309	£12,309	£12,309
Local shops	£4,500	£4,500	£4,500	£4,500	£4,500
Floorspace Requirement (sq.m net)					
Market Harborough	752	910	1,404	1,972	2,525
Lutterworth	267	338	557	810	1,057
Broughton Astley	52	64	103	148	192
Fleckney	-216	-200	-149	-91	-35
Great Glen	279	293	337	388	438
Kibworth	-204	-184	-122	-51	19
Other Harborough	0	8	31	58	84
Total	**931**	**1,230**	**2,161**	**3,235**	**4,280**
Floorspace Requirement (sq.m gross)					
Market Harborough	1,074	1,301	2,005	2,817	3,607
Lutterworth	382	483	796	1,158	1,509
Broughton Astley	74	92	148	212	274
Fleckney	-309	-286	-214	-131	-50
Great Glen	399	419	482	555	625
Kibworth	-291	-262	-174	-72	27
Other Harborough	0	11	44	83	120
Total	**1,329**	**1,757**	**3,087**	**4,621**	**6,114**

Source: Tables 5 and 10

Table 12: Adjusted Broughton Astley Convenience Goods Market Shares

Centre/Facility	Zone 1 Lutterworth Urban	Zone 2 Lutterworth Rural	Zone 3 Kilworth	Zone 4 M.Harborough Rural West	Zone 5 M.Harborough Urban	Zone 6 M.Harborough Rural East	% Inflow
Market Harborough	0.0%	0.4%	17.0%	38.9%	90.3%	31.6%	5.0%
Lutterworth	79.3%	26.1%	25.8%	0.8%	0.0%	0.0%	5.0%
Broughton Astley	0.0%	45.0%	5.0%	0.0%	0.0%	0.3%	10.0%
Fleckney	0.0%	0.0%	1.1%	5.2%	0.0%	0.0%	5.0%
Great Glen	0.0%	0.0%	0.0%	5.0%	0.0%	0.0%	5.0%
Kibworth	0.0%	0.0%	0.4%	6.6%	0.2%	0.0%	5.0%
Other Harborough	0.0%	1.2%	2.1%	0.8%	0.0%	0.0%	5.0%
Harborough Total	**79.3%**	**72.7%**	**51.4%**	**57.3%**	**90.5%**	**31.9%**	
Other outside Harborough	20.7%	27.3%	48.6%	42.7%	9.5%	68.1%	n/a
Grand Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey, August 2013 and NLP adjustments

Table 13: Adjusted Shares Convenience Goods Floorspace Capacity 2013 to 2031

Centre	2013	2016	2021	2026	2031
Available Expenditure in District (£m)					
Market Harborough	82.61	84.25	90.30	97.27	104.05
Lutterworth	36.77	32.50	34.83	37.52	40.14
Broughton Astley	6.53	18.36	19.68	21.20	22.68
Fleckney	3.09	3.16	3.39	3.65	3.90
Great Glen	2.70	2.77	2.96	3.19	3.42
Kibworth	3.78	3.85	4.12	4.44	4.75
Other Harborough	1.44	1.41	1.51	1.63	1.74
Total	**136.92**	**146.30**	**156.80**	**168.90**	**180.68**
Benchmark Turnover of Existing Facilities (£m)					
Market Harborough	73.36	73.36	73.36	73.36	73.36
Lutterworth	33.47	33.47	33.47	33.47	33.47
Broughton Astley	5.90	5.90	5.90	5.90	5.90
Fleckney	4.06	4.06	4.06	4.06	4.06
Great Glen	1.45	1.45	1.45	1.45	1.45
Kibworth	4.70	4.70	4.70	4.70	4.70
Other Harborough	1.44	1.44	1.44	1.44	1.44
Total	**124.37**	**124.37**	**124.37**	**124.37**	**124.37**
Surplus/Deficit Expenditure (£m)					
Market Harborough	9.26	10.89	16.94	23.91	30.70
Lutterworth	3.29	-0.97	1.36	4.05	6.67
Broughton Astley	0.64	12.47	13.78	15.30	16.78
Fleckney	-0.97	-0.90	-0.67	-0.41	-0.16
Great Glen	1.26	1.32	1.52	1.75	1.97
Kibworth	-0.92	-0.85	-0.58	-0.26	0.05
Other Harborough	0.00	-0.03	0.07	0.19	0.30
Total	**12.55**	**21.93**	**32.43**	**44.53**	**56.32**
Turnover Density New Floorspace (£ per sq.m)					
Large food stores	£12,309	£12,309	£12,309	£12,309	£12,309
Local shops	£4,500	£4,500	£4,500	£4,500	£4,500
Floorspace Requirement (sq.m net)					
Market Harborough	752	885	1,376	1,943	2,494
Lutterworth	267	-79	110	329	542
Broughton Astley	52	1,013	1,120	1,243	1,363
Fleckney	-216	-200	-149	-91	-35
Great Glen	279	293	337	388	438
Kibworth	-204	-189	-128	-57	12
Other Harborough	0	-6	16	42	68
Total	**931**	**1,717**	**2,683**	**3,797**	**4,881**
Floorspace Requirement (sq.m gross)					
Market Harborough	1,074	1,264	1,966	2,775	3,563
Lutterworth	382	-113	158	470	774
Broughton Astley	74	1,447	1,600	1,776	1,948
Fleckney	-309	-286	-214	-131	-50
Great Glen	399	419	482	555	625
Kibworth	-291	-271	-183	-82	16
Other Harborough	0	-9	23	60	96
Total	**1,329**	**2,452**	**3,833**	**5,424**	**6,973**

Source: Tables 5 and 12

Appendix 3 Comparison Goods Capacity

Table 1: Study Area Population Projections

Total Population	2011	2013	2016	2021	2026	2031
Zone 1 - Lutterworth Urban	9,353	9,511	9,747	10,186	10,600	10,954
Zone 2 - Lutterworth Rural	16,008	16,278	16,683	17,434	18,142	18,748
Zone 3 - Kilworth	10,976	11,161	11,439	11,954	12,439	12,855
Zone 4 - Market Harborough Rural West	24,956	25,377	26,008	27,180	28,282	29,228
Zone 5 - Market Harborough Urban	22,911	23,297	23,877	24,952	25,965	26,833
Zone 6 - Market Harborough Rural East	24,464	24,877	25,496	26,644	27,725	28,651
Total	**108,668**	**110,501**	**113,251**	**118,351**	**123,153**	**127,269**

Sources:
Experian 2011 - 2011 Census
GL Hearn Harborough Housing Requirements Study March 2013 - Projection 1 (SNPP)
Assumes 405 dwellings per annum between 2011 and 2031 - HDC population increases from 85,699 to 100,368

Table 2: Comparison Goods Expenditure (£ per person per annum)

	2013	2016	2021	2026	2031
Zone 1 - Lutterworth Urban	2,900	3,061	3,422	3,938	4,538
Zone 2 - Luuerworth Rural	3,186	3,363	3,759	4,326	4,985
Zone 3 - Kilworth	3,379	3,566	3,986	4,588	5,287
Zone 4 - Market Harborough Rural West	3,091	3,263	3,647	4,197	4,837
Zone 5 - Market Harborough Urban	2,805	2,961	3,310	3,810	4,390
Zone 6 - Market Harborough Rural East	2,731	2,882	3,222	3,708	4,272

Sources:

Experian 2011

Data in 2011 prices

Excludes Special Forms of Trading

Table 3: Total Comparison Goods Expenditure (£m)

	2013	2016	2021	2026	2031
Zone 1 - Lutterworth Urban	27.58	29.84	34.86	41.75	49.71
Zone 2 - Luuerworth Rural	51.86	56.10	65.54	78.49	93.46
Zone 3 - Kilworth	37.71	40.79	47.65	57.07	67.96
Zone 4 - Market Harborough Rural West	78.44	84.85	99.13	118.72	141.37
Zone 5 - Market Harborough Urban	65.36	70.70	82.59	98.92	117.79
Zone 6 - Market Harborough Rural East	67.93	73.48	85.83	102.80	122.41
Total	**328.89**	**355.76**	**415.60**	**497.73**	**592.70**

Source: Tables 1 and 2

Table 4: Base Year Comparison Goods Market Shares 2013 (%)

Centre/Facility	Zone 1 Lutterworth Urban	Zone 2 Lutterworth Rural	Zone 3 Kilworth	Zone 4 M.Harborough Rural West	Zone 5 M.Harborough Urban	Zone 6 M.Harborough Rural East	% Inflow
Market Harborough town centre	4.6%	2.9%	16.4%	33.4%	41.4%	21.5%	5.0%
Market Harborough out of centre	0.1%	0.1%	1.5%	3.1%	5.7%	2.4%	5.0%
Lutterworth	17.1%	9.0%	7.2%	0.1%	0.0%	0.0%	5.0%
Broughton Astley	0.0%	1.5%	0.3%	0.0%	0.0%	0.0%	5.0%
Fleckney	0.0%	0.0%	0.1%	0.4%	0.0%	0.0%	5.0%
Great Glen	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	5.0%
Kibworth	0.0%	0.0%	0.1%	1.9%	0.1%	0.1%	5.0%
Other Harborough	0.5%	0.4%	0.9%	0.2%	0.0%	0.2%	5.0%
Sub-Total	**22.3%**	**13.9%**	**26.5%**	**39.6%**	**47.2%**	**24.2%**	
Corby	0.0%	0.2%	0.0%	2.2%	10.7%	14.6%	n/a
Kettering	0.2%	0.0%	0.3%	2.0%	7.8%	35.2%	n/a
Leicester/Wigston/Fosse Park	35.0%	60.3%	30.1%	49.1%	27.7%	11.0%	n/a
Rugby	32.6%	10.9%	23.5%	0.5%	0.0%	0.1%	n/a
Other outside Harborough	9.9%	14.7%	19.6%	6.6%	6.6%	14.9%	n/a
Grand Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey, August 2013

Table 5: Base Year Comparison Goods Expenditure Patterns 2013 (£m)

Centre/Facility	Zone 1 Lutterworth Urban	Zone 2 Lutterworth Rural	Zone 3 Kilworth	Zone 4 M.Harborough Rural West	Zone 5 M.Harborough Urban	Zone 6 M.Harborough Rural East	% Inflow	Total
Expenditure 2013	**27.58**	**51.86**	**37.71**	**78.44**	**65.36**	**67.93**		**328.89**
Market Harborough town centre	1.27	1.50	6.18	26.20	27.06	14.60	4.04	80.86
Market Harborough out of centre	0.03	0.05	0.57	2.43	3.73	1.63	0.44	8.88
Lutterworth	4.72	4.67	2.72	0.08	0.00	0.00	0.64	12.82
Broughton Astley	0.00	0.78	0.11	0.00	0.00	0.00	0.05	0.94
Fleckney	0.00	0.00	0.04	0.31	0.00	0.00	0.02	0.37
Great Glen	0.00	0.00	0.00	0.39	0.00	0.00	0.02	0.41
Kibworth	0.00	0.00	0.04	1.49	0.07	0.07	0.09	1.75
Other Harborough	0.14	0.21	0.34	0.16	0.00	0.14	0.05	1.03
Sub-Total	**6.15**	**7.21**	**9.99**	**31.06**	**30.85**	**16.44**	**5.35**	**107.06**
Corby	0.00	0.10	0.00	1.73	6.99	9.92	n/a	18.74
Kettering	0.06	0.00	0.11	1.57	5.10	23.91	n/a	30.75
Leicester/Wigston/Fosse Park	9.65	31.27	11.35	38.52	18.10	7.47	n/a	116.37
Rugby	8.99	5.65	8.86	0.39	0.00	0.07	n/a	23.97
Other outside Harborough	2.73	7.62	7.39	5.18	4.31	10.12	n/a	37.36
Grand Total	**27.58**	**51.86**	**37.71**	**78.44**	**65.36**	**67.93**	**5.35**	**334.24**

Source: Tables 3 and 4

Table 6: Projection Comparison Goods Expenditure Patterns 2016 (£m)

Centre/Facility	Zone 1 Lutterworth Urban	Zone 2 Lutterworth Rural	Zone 3 Kilworth	Zone 4 M.Harborough Rural West	Zone 5 M.Harborough Urban	Zone 6 M.Harborough Rural East	% Inflow	Total
Expenditure 2016	**29.84**	**56.10**	**40.79**	**84.85**	**70.70**	**73.48**		**355.76**
Market Harborough town centre	1.37	1.63	6.69	28.34	29.27	15.80	4.37	87.47
Market Harborough out of centre	0.03	0.06	0.61	2.63	4.03	1.76	0.48	9.60
Lutterworth	5.10	5.05	2.94	0.08	0.00	0.00	0.69	13.87
Broughton Astley	0.00	0.84	0.12	0.00	0.00	0.00	0.05	1.01
Fleckney	0.00	0.00	0.04	0.34	0.00	0.00	0.02	0.40
Great Glen	0.00	0.00	0.00	0.42	0.00	0.00	0.02	0.45
Kibworth	0.00	0.00	0.04	1.61	0.07	0.07	0.09	1.89
Other Harborough	0.15	0.22	0.37	0.17	0.00	0.15	0.06	1.11
Sub-Total	**6.65**	**7.80**	**10.81**	**33.60**	**33.37**	**17.78**	**5.79**	**115.81**
Corby	0.00	0.11	0.00	1.87	7.57	10.73	n/a	20.27
Kettering	0.06	0.00	0.12	1.70	5.51	25.86	n/a	33.26
Leicester/Wigston/Fosse Park	10.44	33.83	12.28	41.66	19.58	8.08	n/a	125.88
Rugby	9.73	6.11	9.59	0.42	0.00	0.07	n/a	25.93
Other outside Harborough	2.95	8.25	8.00	5.60	4.67	10.95	n/a	40.41
Grand Total	**29.84**	**56.10**	**40.79**	**84.85**	**70.70**	**73.48**	**5.79**	**361.55**

Source: Tables 3 and 4

Table 7: Projection Comparison Goods Expenditure Patterns 2021 (£m)

Centre/Facility	Zone 1 Lutterworth Urban	Zone 2 Lutterworth Rural	Zone 3 Kilworth	Zone 4 M.Harborough Rural West	Zone 5 M.Harborough Urban	Zone 6 M.Harborough Rural East	% Inflow	Total
Expenditure 2021	**34.86**	**65.54**	**47.65**	**99.13**	**82.59**	**85.83**		**415.60**
Market Harborough town centre	1.60	1.90	7.82	33.11	34.19	18.45	5.11	102.18
Market Harborough out of centre	0.03	0.07	0.71	3.07	4.71	2.06	0.56	11.22
Lutterworth	5.96	5.90	3.43	0.10	0.00	0.00	0.81	16.20
Broughton Astley	0.00	0.98	0.14	0.00	0.00	0.00	0.06	1.19
Fleckney	0.00	0.00	0.05	0.40	0.00	0.00	0.02	0.47
Great Glen	0.00	0.00	0.00	0.50	0.00	0.00	0.03	0.52
Kibworth	0.00	0.00	0.05	1.88	0.08	0.09	0.11	2.21
Other Harborough	0.17	0.26	0.43	0.20	0.00	0.17	0.07	1.30
Sub-Total	**7.77**	**9.11**	**12.63**	**39.25**	**38.98**	**20.77**	**6.76**	**135.29**
Corby	0.00	0.13	0.00	2.18	8.84	12.53	n/a	23.68
Kettering	0.07	0.00	0.14	1.98	6.44	30.21	n/a	38.85
Leicester/Wigston/Fosse Park	12.20	39.52	14.34	48.67	22.88	9.44	n/a	147.05
Rugby	11.36	7.14	11.20	0.50	0.00	0.09	n/a	30.29
Other outside Harborough	3.45	9.63	9.34	6.54	5.45	12.79	n/a	47.21
Grand Total	**34.86**	**65.54**	**47.65**	**99.13**	**82.59**	**85.83**	**6.76**	**422.37**

Source: Tables 3 and 4

Table 8: Projection Comparison Goods Expenditure Patterns 2026 (£m)

Centre/Facility	Zone 1 Lutterworth Urban	Zone 2 Lutterworth Rural	Zone 3 Kilworth	Zone 4 M.Harborough Rural West	Zone 5 M.Harborough Urban	Zone 6 M.Harborough Rural East	% Inflow	Total
Expenditure 2026	**41.75**	**78.49**	**57.07**	**118.72**	**98.92**	**102.80**		**497.73**
Market Harborough town centre	1.92	2.28	9.36	39.65	40.95	22.10	6.12	122.38
Market Harborough out of centre	0.04	0.08	0.86	3.68	5.64	2.47	0.67	13.43
Lutterworth	7.14	7.06	4.11	0.12	0.00	0.00	0.97	19.40
Broughton Astley	0.00	1.18	0.17	0.00	0.00	0.00	0.07	1.42
Fleckney	0.00	0.00	0.06	0.47	0.00	0.00	0.03	0.56
Great Glen	0.00	0.00	0.00	0.59	0.00	0.00	0.03	0.62
Kibworth	0.00	0.00	0.06	2.26	0.10	0.10	0.13	2.65
Other Harborough	0.21	0.31	0.51	0.24	0.00	0.21	0.08	1.56
Sub-Total	**9.31**	**10.91**	**15.12**	**47.01**	**46.69**	**24.88**	**8.10**	**162.02**
Corby	0.00	0.16	0.00	2.61	10.58	15.01	n/a	28.36
Kettering	0.08	0.00	0.17	2.37	7.72	36.18	n/a	46.53
Leicester/Wigston/Fosse Park	14.61	47.33	17.18	58.29	27.40	11.31	n/a	176.11
Rugby	13.61	8.56	13.41	0.59	0.00	0.10	n/a	36.27
Other outside Harborough	4.13	11.54	11.19	7.84	6.53	15.32	n/a	56.54
Grand Total	**41.75**	**78.49**	**57.07**	**118.72**	**98.92**	**102.80**	**8.10**	**505.83**

Source: Tables 3 and 4

Table 9: Projection Comparison Goods Expenditure Patterns 2031 (£m)

Centre/Facility	Zone 1 Lutterworth Urban	Zone 2 Lutterworth Rural	Zone 3 Kilworth	Zone 4 M.Harborough Rural West	Zone 5 M.Harborough Urban	Zone 6 M.Harborough Rural East	% Inflow	Total
Expenditure 2031	**49.71**	**93.46**	**67.96**	**141.37**	**117.79**	**122.41**		**592.70**
Market Harborough town centre	2.29	2.71	11.15	47.22	48.76	26.32	7.29	145.73
Market Harborough out of centre	0.05	0.09	1.02	4.38	6.71	2.94	0.80	16.00
Lutterworth	8.50	8.41	4.89	0.14	0.00	0.00	1.16	23.10
Broughton Astley	0.00	1.40	0.20	0.00	0.00	0.00	0.08	1.69
Fleckney	0.00	0.00	0.07	0.57	0.00	0.00	0.03	0.67
Great Glen	0.00	0.00	0.00	0.71	0.00	0.00	0.04	0.74
Kibworth	0.00	0.00	0.07	2.69	0.12	0.12	0.16	3.15
Other Harborough	0.25	0.37	0.61	0.28	0.00	0.24	0.09	1.85
Sub-Total	**11.09**	**12.99**	**18.01**	**55.98**	**55.60**	**29.62**	**9.65**	**192.93**
Corby	0.00	0.19	0.00	3.11	12.60	17.87	n/a	33.77
Kettering	0.10	0.00	0.20	2.83	9.19	43.09	n/a	55.41
Leicester/Wigston/Fosse Park	17.40	56.36	20.46	69.41	32.63	13.47	n/a	209.72
Rugby	16.21	10.19	15.97	0.71	0.00	0.12	n/a	43.19
Other outside Harborough	4.92	13.74	13.32	9.33	7.77	18.24	n/a	67.32
Grand Total	**49.71**	**93.46**	**67.96**	**141.37**	**117.79**	**122.41**	**9.65**	**602.34**

Source: Tables 3 and 4

Table 10: Comparison Goods Floorspace and Benchmark Turnover, 2013

Town/Store	Gross Floorspace (sq.m)	Net Sales Floorspace (sq.m)
Market Harborough		
Market Harborough Town Centre	23,025	16,118
Market Harborough Out of Centre	6,200	5,270
Sub-Total	**29,225**	**21,388**
Other Harborough		
Lutterworth	4,170	2,502
Broughton Astley	700	400
Fleckney	n/a	100
Great Glen	n/a	100
Kibworth	500	300
Sub- Total	**5,370**	**3,402**
Total	**34,595**	**24,790**

Source: Valuation Office, Goad and NLP site survey 2013

Table 11: Summary of Comparison Goods Floorspace Capacity 2013 to 2031

Centre	2013	2016	2021	2026	2031
Available Expenditure in District (£m)					
Market Harborough	89.74	97.07	113.40	135.81	161.72
Lutterworth	12.82	13.87	16.20	19.40	23.10
Broughton Astley	0.94	1.01	1.19	1.42	1.69
Fleckney	0.37	0.40	0.47	0.56	0.67
Great Glen	0.41	0.45	0.52	0.62	0.74
Kibworth	1.75	1.89	2.21	2.65	3.15
Other Harborough	1.03	1.11	1.30	1.56	1.85
District Total	**107.06**	**115.81**	**135.29**	**162.02**	**192.93**
Benchmark Turnover of Existing Facilities (£m)					
Market Harborough	89.74	95.23	105.15	116.09	128.17
Lutterworth	12.82	13.60	15.02	16.58	18.31
Broughton Astley	0.94	1.00	1.10	1.21	1.34
Fleckney	0.37	0.39	0.43	0.48	0.53
Great Glen	0.41	0.44	0.48	0.53	0.59
Kibworth	1.75	1.86	2.05	2.26	2.50
Other Harborough	1.03	1.09	1.21	1.33	1.47
District Total	**107.06**	**113.61**	**125.44**	**138.49**	**152.91**
Surplus Expenditure (£m)					
Market Harborough	n/a	1.84	8.26	19.72	33.55
Lutterworth	n/a	0.26	1.18	2.82	4.79
Broughton Astley	n/a	0.02	0.09	0.21	0.35
Fleckney	n/a	0.01	0.03	0.08	0.14
Great Glen	n/a	0.01	0.04	0.09	0.15
Kibworth	n/a	0.04	0.16	0.38	0.65
Other Harborough	n/a	0.02	0.09	0.23	0.38
District Total	**n/a**	**2.20**	**9.85**	**23.53**	**40.03**
Turnover Density New Floorspace (£ per sq.m)	5,000	5,306	5,858	6,468	7,141
Floorspace Requirement (sq.m net)					
Market Harborough	n/a	347	1,409	3,049	4,698
Lutterworth	n/a	50	201	436	671
Broughton Astley	n/a	4	15	32	49
Fleckney	n/a	1	6	13	19
Great Glen	n/a	2	6	14	22
Kibworth	n/a	7	27	59	92
Other Harborough	n/a	4	16	35	54
Total	**n/a**	**414**	**1,681**	**3,638**	**5,605**
Floorspace Requirement (sq.m gross)					
Market Harborough	n/a	462	1,879	4,066	6,264
Lutterworth	n/a	66	268	581	895
Broughton Astley	n/a	5	20	42	65
Fleckney	n/a	2	8	17	26
Great Glen	n/a	2	9	19	29
Kibworth	n/a	9	37	79	122
Other Harborough	n/a	5	22	47	72
Total	**n/a**	**552**	**2,242**	**4,850**	**7,473**

Appendix 4 Audit of Centres

A. Market Harborough

Market Harborough is one of the main shopping and commercial centres within Harborough District, and is located in the south east of the District. The centre has a variety of retail and service uses, and is the administrative centre for Harborough District.

The key roles of Harborough include:

- **Convenience shopping:** The centre is very well served by convenience retailers with Sainsbury's, Waitrose, Co-op, Tesco Metro, Aldi and Lidl all located within the centre. Convenience provision is supported by a good selection of bakers, newsagents, butchers, fishmongers, delicatessen and a market.
- **Comparison shopping:** there is 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.
- **Services**: provides a good range and choice of services including high street banks, estate agents, hairdressers, cafes, restaurants, pubs and takeaways.
- **Entertainment:** a theatre.
- **Community facilities:** Library, civic offices, museum and social clubs.

Mix of Uses and Retailer Occupation

Market Harborough has a total of 271 retail/service uses. The diversity of uses present in Market Harborough in terms of the number of units is set out in Table A.1, compared against the national average.

Table A.1 Market Harborough Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	139	51.3	40.9
Convenience Retail	22	8.1	8.6
A1 Services (2)	27	10.0	11.7
A2 Services	27	10.0	9.1
A3/A5	36	13.3	16.0
Vacant (3)	20	7.4	13.7
Total	**271**	**100.0**	**100.0**

Source: Goad Plans November 2012
(1) UK average for all town centres surveyed by Goad Plans (November 2012)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) Goad Plans November 2012, updated by NLP September 2013

The centre's mix of units is broadly similar to the national average, but with a higher proportion of comparison retail units. The proportion of A1, A3 and A5 service units is slightly below the national average and the proportion of convenience retail units is broadly in line with the national average. The number of vacant units is much lower than the national average, which suggests the health of the centre is strong.

Retailer Representation

Market Harborough has a good selection of comparison shops (139) reflecting its size and role in the shopping hierarchy in the District. Table A.2 provides a breakdown of comparison shop units by category.

Table A.2 Market Harborough Breakdown of Comparison Units

Type of Unit	Market Harborough		% UK Average*
	Units	%	
Clothing and footwear	49	35.3	25.6
Furniture, carpets and textiles	9	6.5	8.3
Booksellers, arts, crafts and stationers	14	10.1	10.9
Electrical, gas, music and photography	9	6.5	9.5
DIY, hardware and homewares	15	10.8	6.2
China, glass, gifts and fancy goods	7	5.0	3.9
Cars, motorcycles and motor access	0	0.0	2.9
Chemists, drug stores and opticians	13	9.3	9.4
Variety, department and catalogue	2	1.4	1.4
Florists, nurserymen and seedsmen	3	2.2	2.2
Toys, hobby, cycle and sport	4	2.9	5.1
Jewellers	6	4.3	4.9
Other comparison retailers	8	5.8	9.7
Total	**139**	**100.0**	**100.0**

Source: Goad Plan November 2012
*UK average for all town centres surveyed by Goad Plans (November 2012)

The centre provides most of the Goad Plan comparison categories apart from cars, motorcycles and motor access goods. There is a good range of clothing and footwear shops which account for just over a third of the comparison provision, which is higher than the national average. There is also a good provision of DIY/hardware / homewares and China/drug stores/opticians. There are seven charity shops within the ‘other comparison retailers’ category.

Service Uses

Market Harborough has a good range of non-retail service uses, with all categories present and well represented (see Table A.3). The proportion of A2 service uses is slightly above the national average and the proportion of A1 and A3/A5 uses is below. The wide range of services in Market Harborough reflects its day to day shopping and service role.

Table A.3 Market Harborough Analysis of Selected Service Uses

Type of Unit	Market Harborough		% UK Average*
	Units	%	
Restaurants/cafes/takeaways	37	41.1	44.9
Banks/other financial services	10	11.1	13.4
Estate agents/valuers	17	18.9	10.6
Travel agents	4	4.4	3.3
Hairdressers/beauty parlours	20	22.2	25.2
Laundries/dry cleaners	2	2.2	2.6
Total	**90**	**100.0**	**100.0**

Source: Goad Plan March 2012
*UK average for all town centres surveyed by Goad Plans (November 2012)

Vacant Units

There were 20 vacant retail units within Market Harborough at the time of the GOAD Survey, giving a vacancy rate of 7.4%, below the national average of 13.7%. The vacant units are dispersed throughout the centre.

Summary of Market Harborough's Strengths and Weaknesses

Strengths

- The centre provides a reasonable range and mix of both national multiple and independent comparison retailers.
- There is a good provision of convenience retailers and large food stores, with the Sainsbury's, Waitrose, Lidl, Aldi, Tesco Metro and Co-op catering for both main and top up food shopping. These stores are supported by good quality independent traders.
- The centre has a good range and choice of non-retail services.
- The centre's vacancy level is much lower than the national average.
- The Market stalls in the Square create a lively street scene.
- The indoor market provides a range of comparison and retail goods.
- Overall the attractive historic shopping environment is well maintained and pleasant.

Weaknesses

- Period shop premises do not always meet the requirements of modern occupiers.
- The historic environment constrains the centre development potential.
- The proportion of estate agents is higher than the national average.
- There is a reasonable level of traffic congestion within the main road junction within the centre.

B. Lutterworth

Lutterworth is the second largest shopping and commercial centre within Harborough and is located to the west of the District.

The key roles of Lutterworth include:

- **Convenience shopping:** Morrisons, Waitrose and the Co-op provide convenience provision for both main food and top up shopping. These are supported by a small selection of butchers, a bakers, an off license and a newsagents. An open market is provided at Bell Street.
- **Comparison shopping:** the centre predominantly comprises independent retailers located along the High Street and Church Street.
- **Services:** provides a good range and choice of services including high street banks, estate agents, hairdressers, cafes, restaurants, pubs and takeaways;
- **Entertainments:** a number of public houses are located throughout the centre;
- **Community facilities:** medical surgeries, library and social club.

Mix of Uses and Occupier Representation

Lutterworth has a total of 89 retail/service uses. The diversity of uses present in Lutterworth in terms of the number of units is set out in Table B.1, compared against the national average.

Table B.1 Lutterworth Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	39	43.8	40.9
Convenience Retail	8	9.0	8.6
A1 Services (2)	11	12.4	11.7
A2 Services	13	14.6	9.1
A3/A5	11	12.3	16.0
Vacant (3)	7	7.8	13.7
Total	**89**	**100.0**	**100.0**

Source: Goad Plans November 2012
(1) UK average for all town centres surveyed by Goad Plans (November 2012)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) Goad Plans November 2012, updated by NLP September 2013

The centre's mix of units is broadly similar to the national average although it has a slightly higher proportion of A2 service units and a lower proportion of A3/A5 units. The vacancy rate of this centre is much lower than the national average at 7.8%, which reflects a vital and viable centre.

Retailer Representation

Lutterworth has a good selection of comparison shops (39) when compared with other centres in the District, reflecting its role in the retail hierarchy in the District. Table B.2 provides a breakdown of comparison shop units by category.

Table B.2 Lutterworth Breakdown of Comparison Units

Type of Unit	Lutterworth		% UK Average*
	Units	%	
Clothing and footwear	3	7.7	25.6
Furniture, carpets and textiles	2	5.1	8.3
Booksellers, arts, crafts and stationers	9	23.1	10.9
Electrical, gas, music and photography	4	10.3	9.5
DIY, hardware and homewares	3	7.7	6.2
China, glass, gifts and fancy goods	3	7.7	3.9
Cars, motorcycles and motor access	1	2.5	2.9
Chemists, drug stores and opticians	5	12.8	9.4
Variety, department and catalogue	0	0.0	1.4
Florists, nurserymen and seedsmen	1	2.5	2.2
Toys, hobby, cycle and sport	2	5.1	5.1
Jewellers	1	2.5	4.9
Other comparison retailers	5	12.8	9.7
Total	**39**	**100.00**	**100.00**

Source: Goad Plan November 2012
*UK average for all town centres surveyed by Goad Plans (November 2012)

The centre provides all of the Goad Plan comparison categories except variety, department and catalogue stores. There is a good range of booksellers/arts/crafts/stationers, china/glass/gifts/fancy goods and chemists/drug stores/opticians and the proportion of these categories are above the national average. The categories with the smallest provision in Lutterworth when compared to the national average are clothing/footwear and jewellers. There are four charity shops and one pet shop in the 'other comparison retailers' category.

Service Uses

Lutterworth has a good range of non-retail service uses, with all categories present and well represented (see Table B.3) reflecting the size of Lutterworth and its service role in the shopping hierarchy. The proportion of restaurants/cafes/takeaways and hairdressers/beauty parlours is below the national average, whilst the proportion of banks/other financial services, estate agents/valuers and travel agents is above.

Table B.3 Lutterworth Analysis of Selected Service Uses

Type of Unit	Lutterworth		% UK Average*
	Units	%	
Restaurants/cafes/takeaways	12	34.29	44.9
Banks/other financial services	6	17.14	13.4
Estate agents/valuers	6	17.14	10.6
Travel agents	3	8.57	3.3
Hairdressers/beauty parlours	7	20.00	25.2
Laundries/dry cleaners	1	2.86	2.6
Total	**35**	**100.00**	**100.00**

Source: Goad Plan November 2012
*UK average for all town centres surveyed by Goad Plans (November 2012)

Vacant Units

There were 7 vacant retail units within Lutterworth at the time of the Goad survey, giving a vacancy rate of 7.8%, significantly below the national average of 13.7%. The vacant units are dispersed through the centre.

Summary of Lutterworth's Strengths and Weaknesses

Strengths

- There is a good provision of convenience retailing within the centre, with Morrisons, Waitrose and Co-op. These stores cater for both main and top up food shopping.
- The centre has a good range of independent comparison shops and services that meet the day to day needs of residents.
- The vacancy rate is lower than the national average.

Weaknesses

- The centre are a limited choice of national multiple comparison shops.
- The proportion of clothing and footwear stores is significantly below the national average. Lutterworth's comparison offer is primarily lower order comparison goods. Residents primarily look to Leicester for higher order comparison goods.

C. Broughton Astley

Broughton Astley is a defined village centre, located to the east of the borough.

The key roles of Broughton Astley include:

- **Convenience shopping:** including small Co-op, Spar, Londis, Mace stores and a butcher and a baker. These provide a top up shopping role.
- **Comparison shopping:** the centre comprises a small range of independent retailers.
- **Services:** provides a range and choice of services estate agents, hairdressers, cafés, restaurants, and takeaways;
- **Entertainments:** two public houses are located within the centre;
- **Community facilities:** a library.

Mix of Uses and Occupier Representation

Broughton Astley has a total of 48 retail/service uses. The diversity of uses present in Broughton Astley in terms of the number of units is set out in Table C.1, compared against the national average.

Table C.1 Broughton Astley Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	16	33.3	40.9
Convenience Retail	6	12.5	8.6
A1 Services (2)	9	18.7	11.7
A2 Services	7	14.6	9.1
A3/A5	7	14.6	16.0
Vacant (3)	3	6.2	13.7
Total	**48**	**100.0**	**100.0**

Source: Goad Plans November 2012
(1) UK average for all town centres surveyed by Goad Plans (November 2012)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good
(3) NLP September 2013

The centre's mix of units is broadly similar to the national average although it has a higher proportion of convenience and A1, A2, A3 and A5 service units when compared against the national average. This reflects the centre's local service shopping role. The vacancy rate of this centre is much lower than the national average at 6.2%, which suggests the centre is healthy.

Retailer Representation

Broughton has a fair selection of comparison shops (16) for a centre of its size and for its service centre role in the retail hierarchy in the District. Table C.2 provides a breakdown of comparison shop units by category.

Table C.2 Broughton Astley Breakdown of Comparison Units

Type of Unit	Broughton Astley		% UK Average*
	Units	%	
Clothing and footwear	1	6.2	25.6
Furniture, carpets and textiles	3	18.8	8.3
Booksellers, arts, crafts and stationers	1	6.2	10.9
Electrical, gas, music and photography	1	6.2	9.5
DIY, hardware and homewares	1	6.2	6.2
China, glass, gifts and fancy goods	2	12.5	3.9
Cars, motorcycles and motor access	0	0.0	2.9
Chemists, drug stores and opticians	2	12.5	9.4
Variety, department and catalogue	0	0.0	1.4
Florists, nurserymen and seedsmen	2	12.5	2.2
Toys, hobby, cycle and sport	0	0.0	5.1
Jewellers	0	0.0	4.9
Other comparison retailers	3	18.8	9.7
Total	**16**	**100.0**	**100.0**

Source: Goad Plan November 2012
*UK average for all town centres surveyed by Goad Plans (November 2012)

The centre does not provide any cars/motorcycles/motor access, variety/department/catalogue, toys/hobby/cycle/sport or jewellery stores. There is a high proportion of furniture/carpets/textile, china/glass/gifts/fancy goods, chemists/drug stores/opticians and florists/nurserymen/seedsman when compared to the national average. The proportion of clothing/footwear stores is low. The choice of shops in all categories is limited.

Service Uses

Broughton Astley has a good range of non-retail service uses, with all categories present and well represented (see Table C.3) reflecting the size of Broughton Astley and its service role in the shopping hierarchy. The proportion of restaurants/cafes/takeaways and hairdressers/beauty parlours is below the national average, whilst the proportion of banks/other financial services, estate agents/valuers and travel agents is above.

Table C.3 Broughton Astley Analysis of Selected Service Uses

Type of Unit	Broughton Astley		% UK Average*
	Units	%	
Restaurants/cafes/takeaways	7	30.4	44.9
Banks/other financial services	4	17.4	13.4
Estate agents/valuers	3	13.0	10.6
Travel agents	0	0.0	3.3
Hairdressers/beauty parlours	9	39.1	25.2
Laundries/dry cleaners	0	0.0	2.6
Total	**23**	**100.0**	**100.0**

Source: NLP September 2013
*UK average for all town centres surveyed by Goad Plans (November 2012)

Vacant Units

There were 3 vacant retail units within Broughton Astley at the time of the Goad survey, giving a vacancy rate of 6.2%, significantly below the national average of 13.7%. The vacant units are dispersed through the centre.

Summary of Broughton Astley's Strengths and Weaknesses

Strengths

- There is a good provision of convenience retail provision for top up shopping.
- The centre has a good range of non-retail service uses.
- The vacancy rate is lower than the national average.

Weaknesses

- The centre has a small localised catchment area, with most customers coming from Broughton Astley urban area.
- Food stores are relatively small and do not attract a significant proportion of main and bulk food shopping trips.
- The choice of comparison retail units is limited and many categories of shops are not represented.

Appendix 5 Household Survey Results

Household Survey Results

Survey Structure

NEMS Market Research carried out a telephone survey of 800 households across the Harborough District study area in August and September 2013. The study area was split into six zones, based on ward boundaries.

The number of interviews undertaken reflects the population in each zone in order to provide statistically reliable sub-samples. The main aims of the survey were to establish patterns for the following:

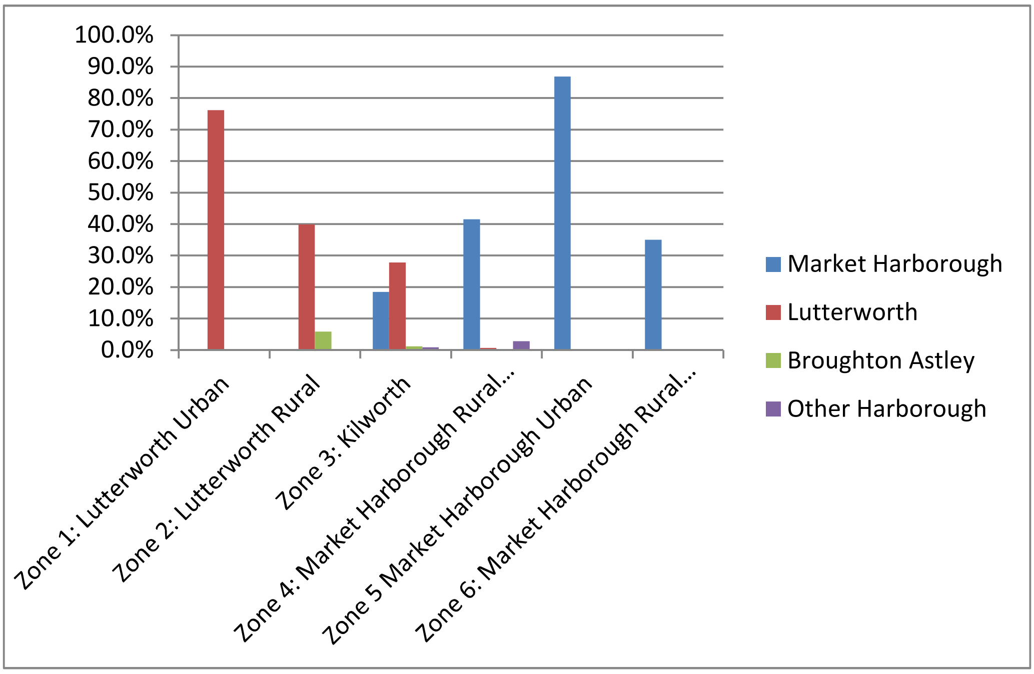
- Main food and top up grocery shopping;
- Non-food shopping, including:
  - clothing and footwear;
  - domestic electrical appliances;
  - other electrical goods (TV, Hi-Fi and computers);
  - furniture, soft furnishing or carpets;
  - DIY/hardware items and garden items;
  - chemist, health and beauty items;
  - baby items; and
  - other non-food items (e.g. books, CDs, DVDs, toys and gifts).

Main Food Shopping

Large food stores are the primary destination for main food shopping trips across the study area. Overall, the Sainsbury's store at Market Harborough was the most popular shopping destination (15.9%), followed by the Morrisons store at Lutterworth (12.5%), Aldi in Corby and Waitrose in Lutterworth (both 4.8%) and Asda in Leicester (4.1%) for the study area as a whole. Home shopping /the internet were used by 4.6% of respondents. The market share of main food shopping for each town centre is shown in the graph below.

Lutterworth and Market Harborough only have high market shares (over 40%) of main food shopping within their local zones (Zones 1 and 5). Market Harborough's rural catchment area extends into Zone 4 and 6. Lutterworth's rural catchment area extends into Zone 2 and Zone 3. Other centres in the District including Broughton Astley attract a limited number of main food shopping trips.

Figure A Main food shopping



Source: NEMS Household Survey September 2013

Mode of Travel for Main Food Shopping

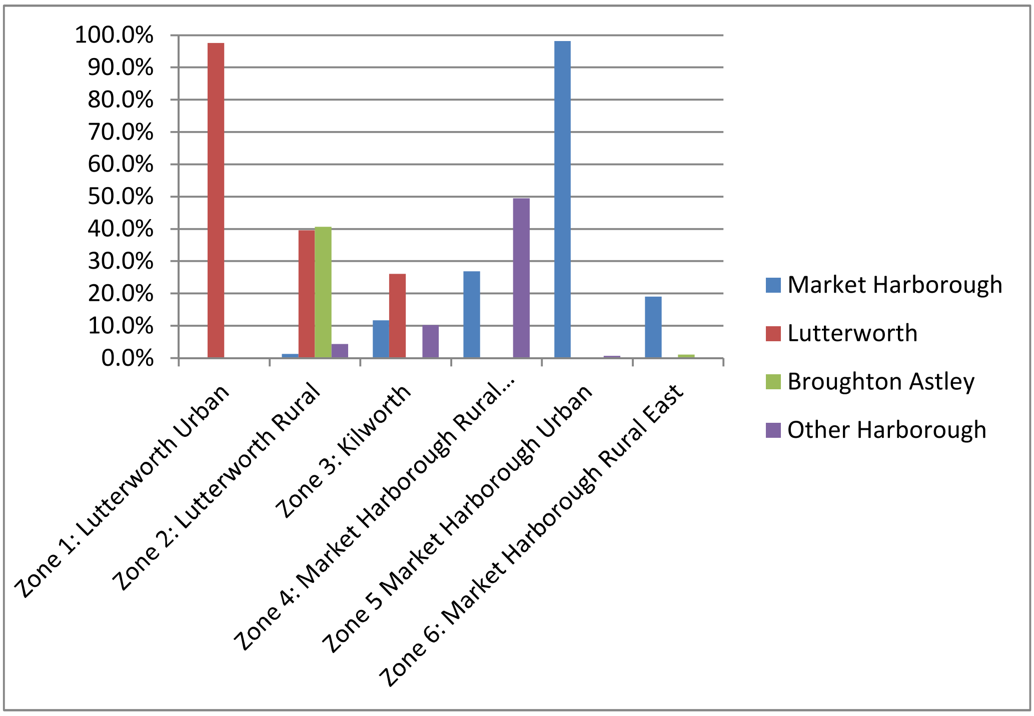
In the whole study area, 87% of respondents indicated that they travel to do their main food shopping by car (both driver and passenger) which is higher than the NLP average derived from similar surveys across the country (74.6%). A lower proportion walk to their main food shopping destination (4.8%) compared to the NLP average of 11.7%, and again a lower proportion of households travel by bus (1.9%) compared to the NLP averages derived from other surveys of 8.6%.

Top-Up Food Shopping

Top-up food shopping trips are normally made to supplement main food shopping trips and are undertaken on a more frequent basis for staples such as bread and milk. Around 77% of households across the catchment area indicated that they undertake small-scale or top-up shopping trips in addition to their main food shopping trips. The market share of top-up food shopping for each town is shown in the graph below.

Broughton Astley attracts more top-up shopping trips from the Lutterworth Rural Zone (Zone 2), but large food stores in Market Harborough and Lutterworth remain the dominant destinations.

Figure B Top up food shopping



Source: NEMS Household Survey September 2013

Local Shops and Services

Respondents were asked which town or village they visit more frequently to use local shops or services. Across the study area as a whole, the most popular destination was Market Harborough (38.4%) followed by Lutterworth (17.5%). Broughton Astley attracted 4.5% of trips overall, Kibworth 3.4%, Fleckney 1.8% and Great Glen 1.1% of trips.

Non-Food Shopping

Respondents were asked in which location they buy most of their household’s non-food shopping. For the study area as a whole, Market Harborough was the most popular destination with 27% of all respondents shopping there, followed by Leicester (17.1%), Fosse Park, Leicester (11.4%), and Rugby (8.4%). This demonstrates that the majority of non-food shopping is carried out outside the District.

Overall 6.4% of respondents buy most of their non-food shopping on the internet or have it delivered. The Market Harborough Rural East zone has the highest proportion of respondents who buy most of their non-food shopping on the internet/by mail order (9%), followed by the Market Harborough Rural West zone (8.9%). The Kilworth zone undertakes the lowest proportion of non-food shopping on the internet/by mail order (3.0%).

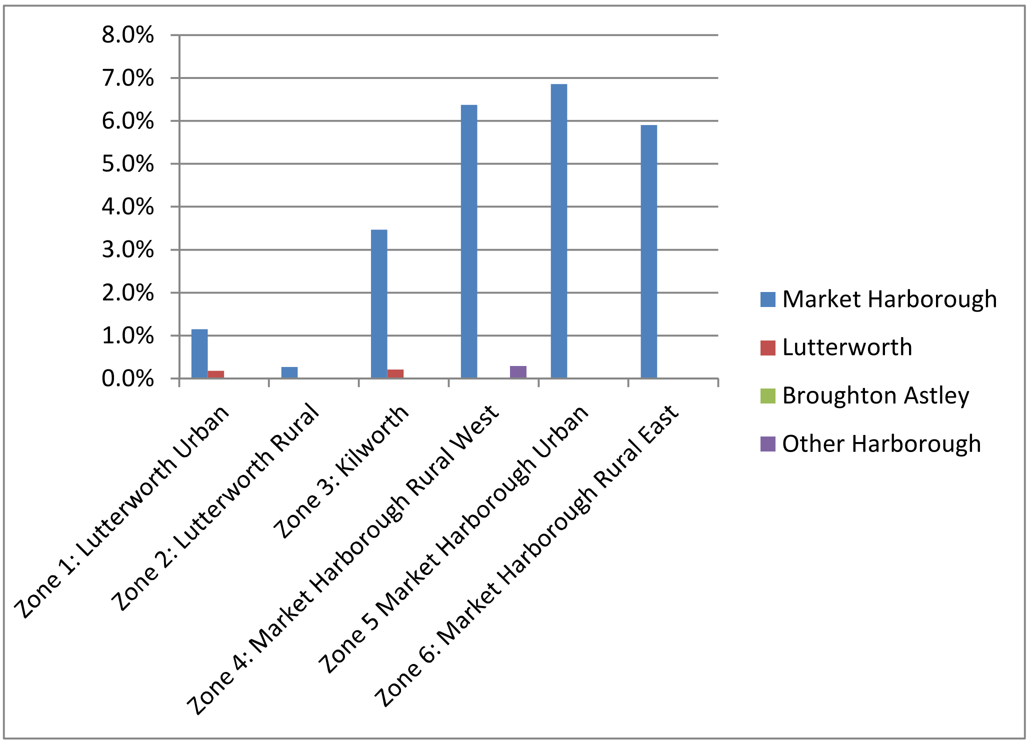
Mode of Travel for Non-Food Shopping

The predominant mode of travel for non-food shopping was the car (both driver and passenger) with 80.6% of respondents indicating that they use this form of travel. The second most popular mode of transport for travelling to non-food shopping destinations was by bus/coach (6.4%) followed by walking (4%).

Non-Food Shopping Destinations

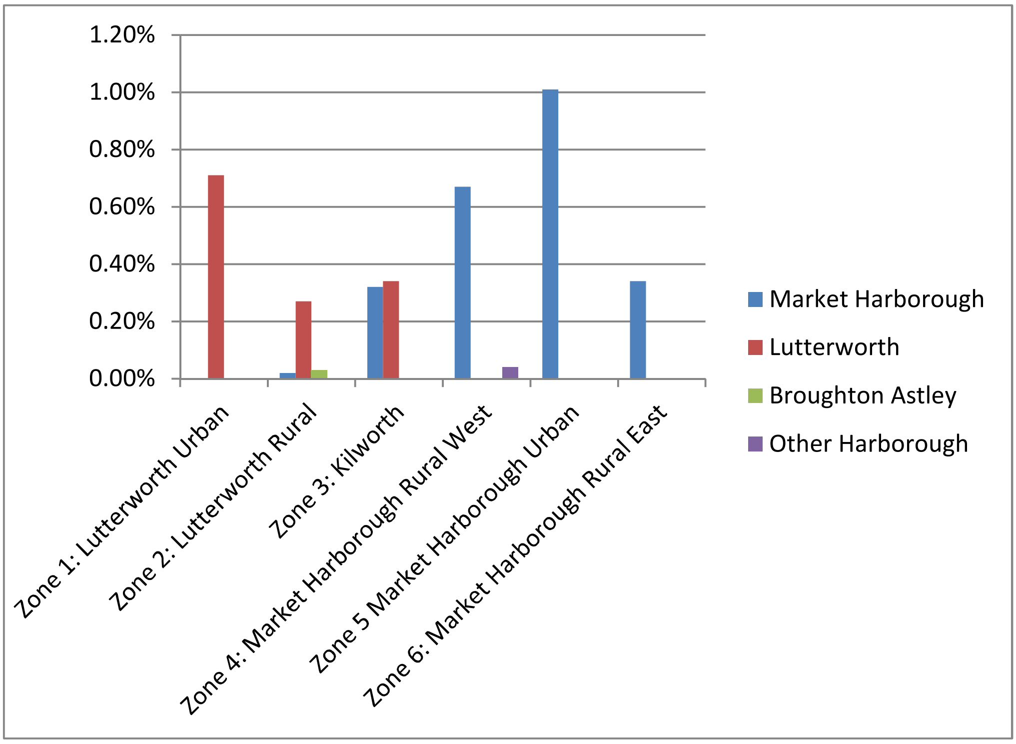
The household survey asked specific questions to probe which destinations respondents last visited to undertake particular types of non-food shopping. The market share for each non-food goods category within each town in Harborough is shown in the graphs below and overleaf.

Figure C Clothing and Shoes



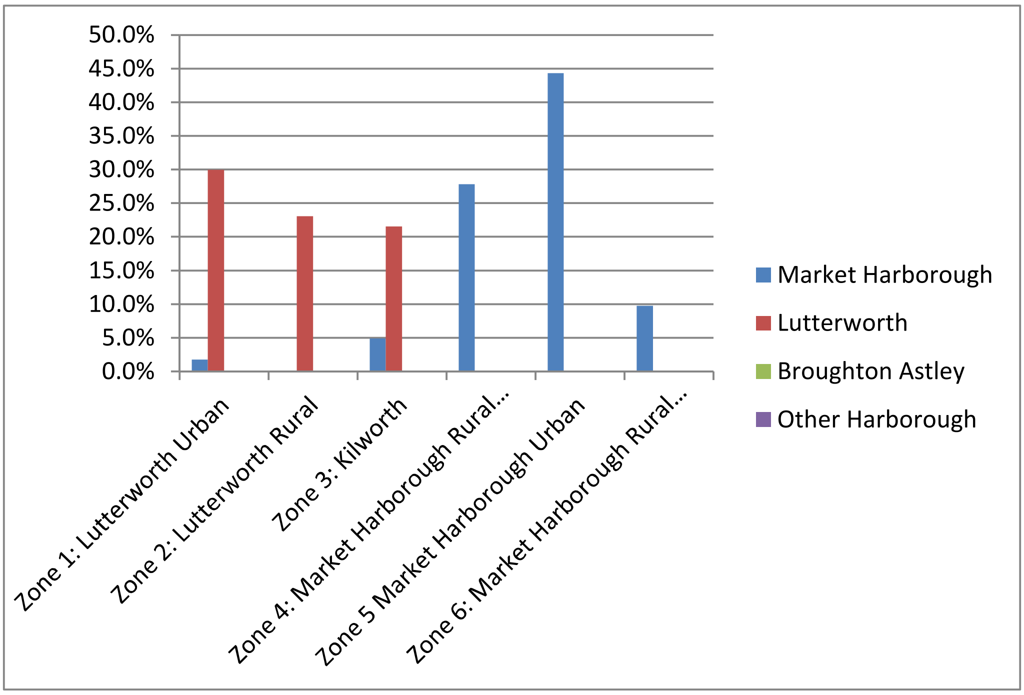
Source: NEMS Household Survey September 2013

Figure D Domestic Electrical Appliances



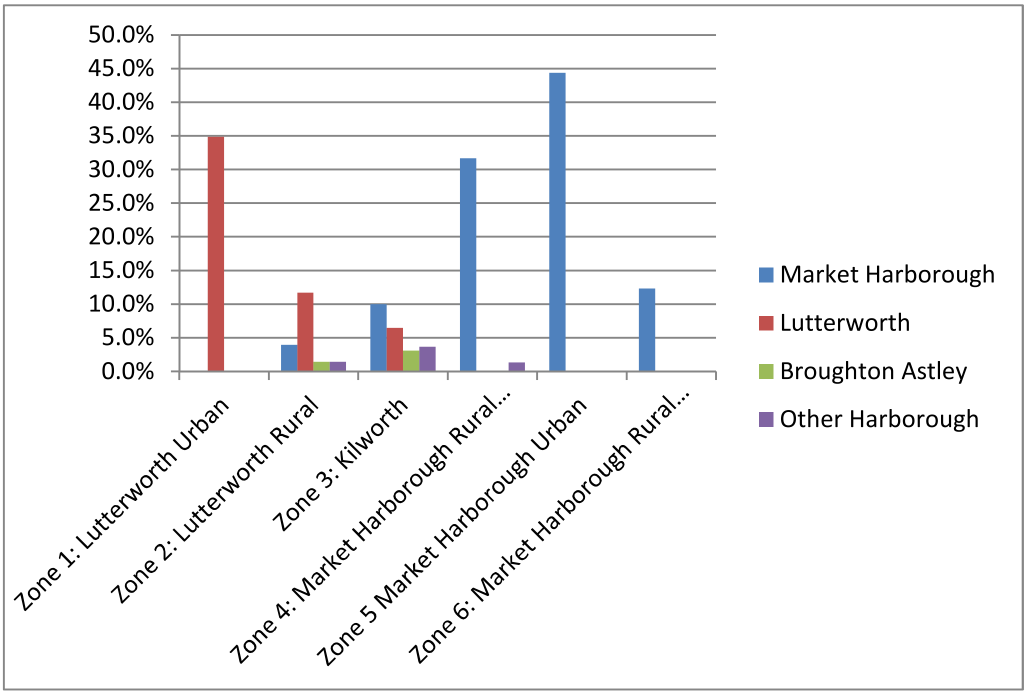
Source: NEMS Household Survey September 2013

Figure E Other Electrical Goods



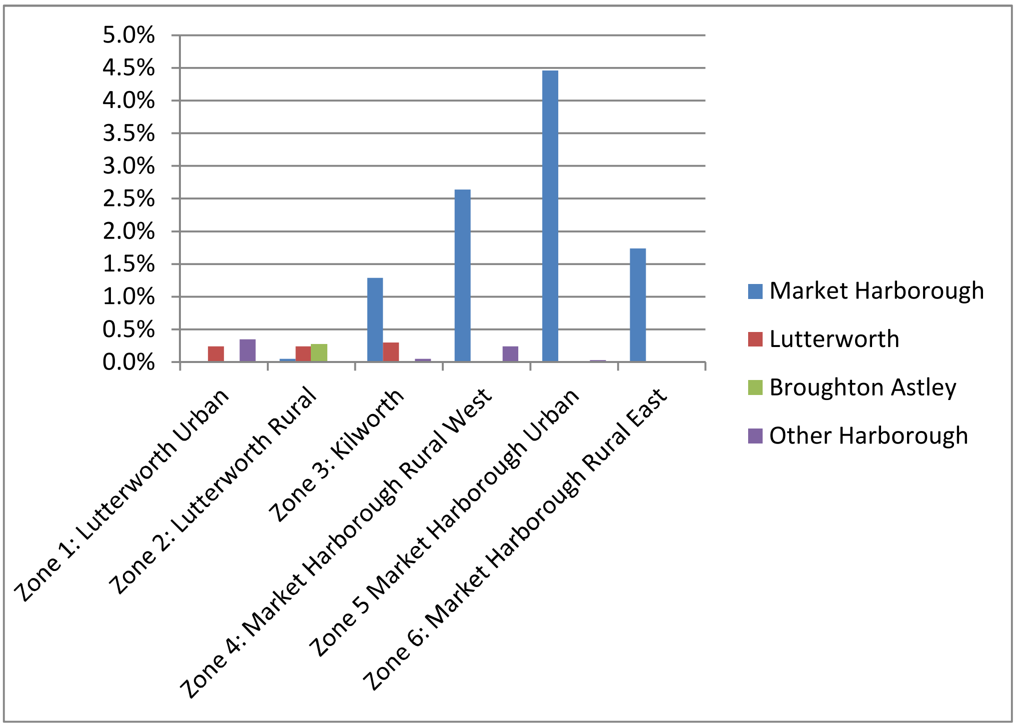
Source: NEMS Household Survey September 2013

Figure F Furniture, Soft Furnishings and Floor Coverings



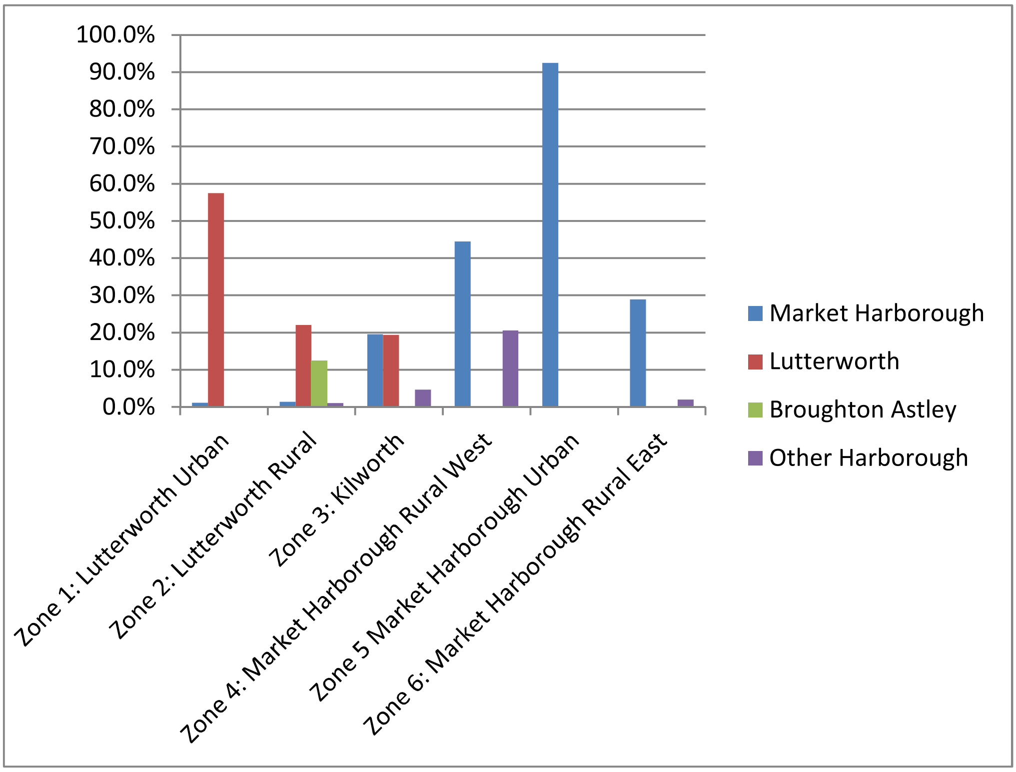
Source: NEMS Household Survey, September 2013

Figure G DIY, Hardware and Garden Items



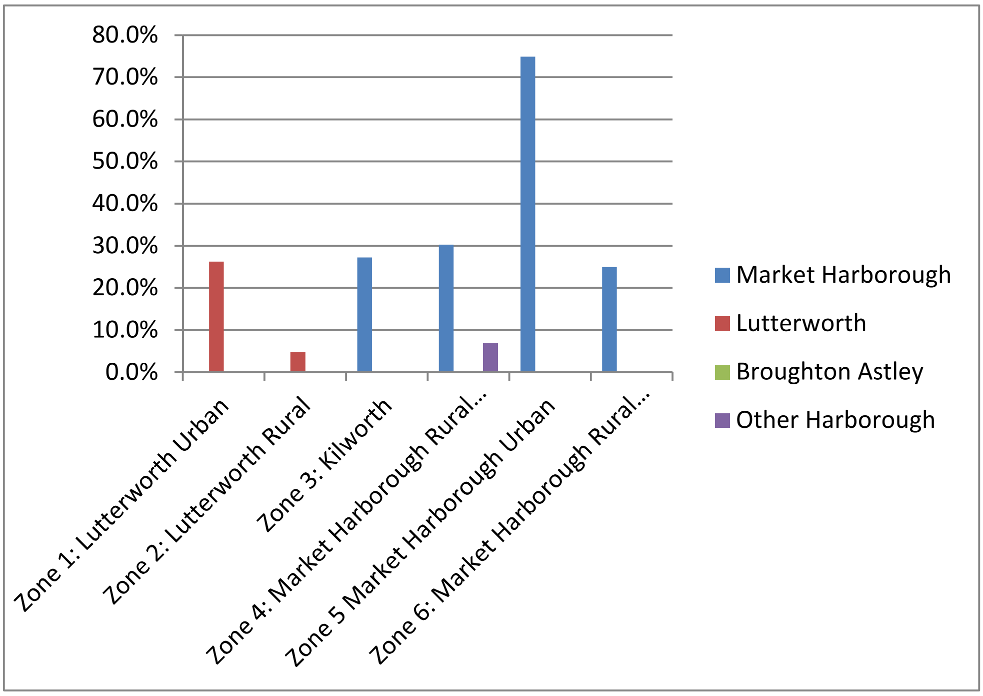
Source: NEMS Household Survey September 2013

Figure H Health, Beauty and Chemist



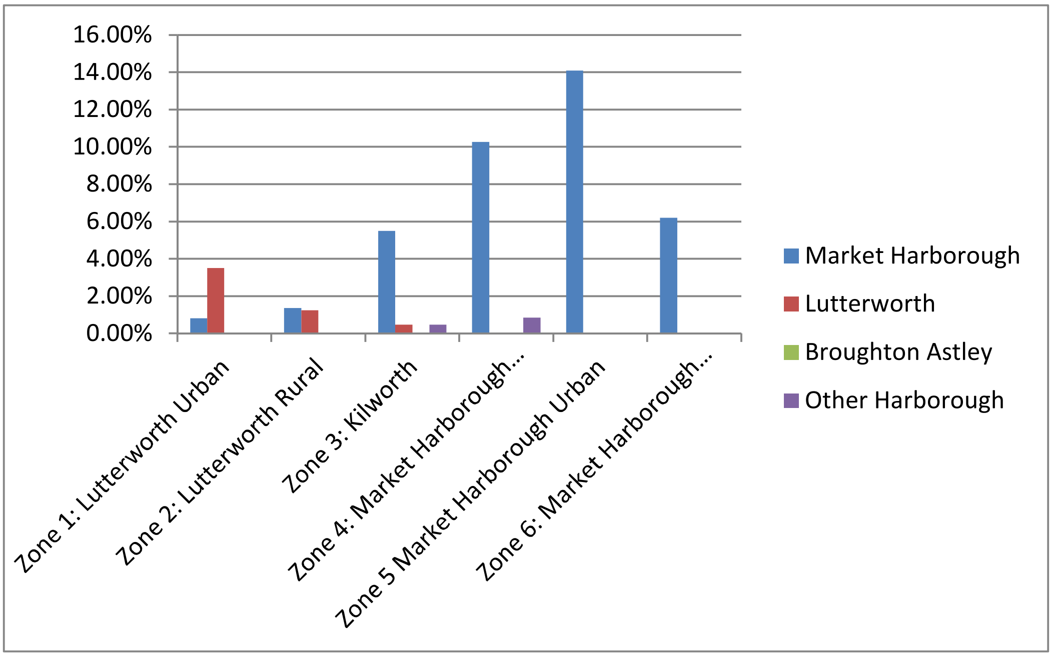
Source: NEMS Household Survey, September 2013

Figure I Baby Products



Source: NEMS Household Survey, September 2013

Figure J	Books, CDs, Toys and Gifts



Source:	NEMS Household Survey, September 2013

Internet Shopping

Respondents were asked what goods they regularly buy on the internet. Over 30% stated that they did not regularly buy items on the internet. The most popular response was books (37.8%), followed by CDs/DVDs (30.5%), Clothes and Shoes (20.5%) and Electrical Goods (12.6%). Groceries were only 6.1%.

Shoppers' Views

The household survey asked respondents what would make them visit the main centres more often.

- Market Harborough: Over half responded that nothing would make them visit Market Harborough more often (51.9%). 12.1% advised that free parking would encourage trips, followed by a better choice of shops in general (10%), a better choice of clothing shops (7.9%)
- Lutterworth: Around two thirds of respondents said nothing would make them visit Lutterworth more often (64.9%). 13.9% replied a better choice of shops would make them visit more, and a further 5.5% said an increase in choice of clothing shops. 1.1% replied free car parking.
- Broughton Astley: 77.3% confirmed that nothing would make them visit more often. 3.9% replied a better choice of shops would encourage trips, 2.9% replied more food supermarkets and a 0.8% replied more car parking.

Leisure & Community Uses

Pubs/ Bars

The household survey asked respondents if and where they or their family last visited a pub/bar. 84.2% of respondents indicated that they visited pubs/bars. This is higher than the NLP average from other surveys (47.5%) Overall, Market Harborough (16.9%), Lutterworth (7.8%) and Broughton Astley (4.5%) were the most popular destinations. However, most people generally tended to visit pubs and bars according with the closest main centre within each zone. For example, out of the 16.9% of people who visited a pub/bar in Market Harborough, 57.7% came from the Market Harborough Urban Zone (Zone 5).

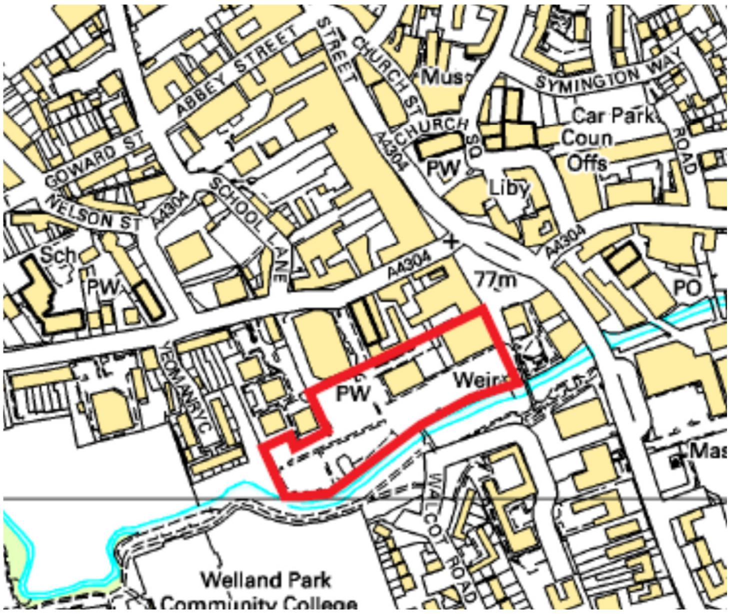
Restaurants

Overall 89% of respondents indicated they visit restaurants and this is higher than the NLP average for other surveys (67.9%). Of all the respondents who visited restaurants, Market Harborough attracted the highest proportion of respondents (23.8%) followed by Lutterworth (7.4%), Leicester (5.1%) and Gilmorton (4.3%).

Community Facilities

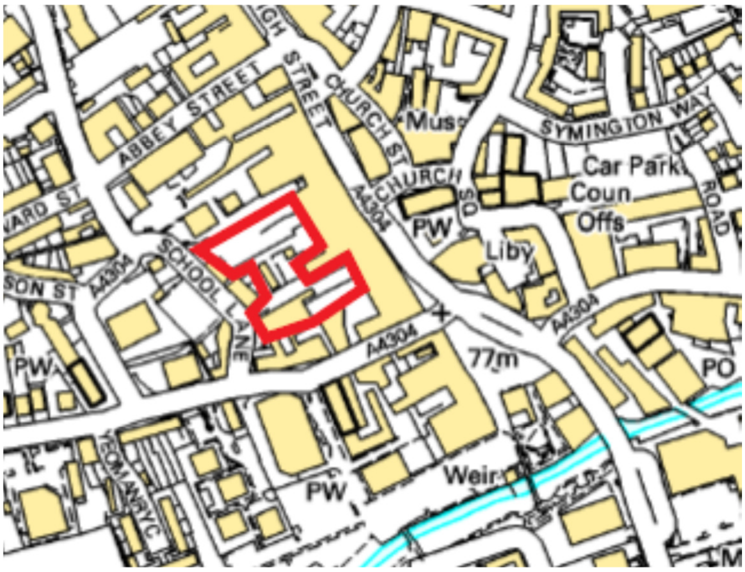
Respondents were asked what location they normally visit for community facilities such as libraries and community halls. Over a third said they did not visit community facilities (34%). Again, the most popular destination was Market Harborough (19.3%), followed by Lutterworth (13.5%).

Appendix 6 Development Sites

Site M1: COMMONS CAR PARK, MARKET HARBOROUGH	
	
The site is approximately 0.6 ha site comprises a surface car park accessed from Coventry Road (approx. 400 spaces). The site includes a B&M Bargains store (c. 600 sqm) and a Tesco Metro Store fronting The Square (c. 960 sqm). It is not allocated within the Development Plan for development.	
Evaluation Criteria	**Comments**
Sequential Status	In-centre
Linkages with centre	Good pedestrian linkages to The Square although visibility from centre restricted.
Availability	Medium Term: Council owned car park but availability of B&M Bargains and Tesco Metro units for redevelopment unknown.
Likely Type of Development	Mixed use retail development with potential for residential above. Potential to extend the Co-op store (c. 500 sqm) and/or demolition of the B&M and Tesco Metro stores to provide an extended food store with decked car parking. There is an opportunity to provide a more sympathetic building with an extended footprint of around 2,000 sqm gross at ground floor level. Servicing to the Tesco Metro Store would be from Coventry Road to the rear. Servicing to the Co-op would be as existing.
Scale of Development	Medium Scale: Potential for a net increase of up to 1,500 sqm gross convenience floorspace through expansion of the existing Co-op and Tesco Metro stores.
Commercial Potential	Unit fronting The Square in a commercially valuable location with high visibility. Would be dependent on Tesco seeking an extended replacement store in this location, or terminating its lease for another operator. Extended Co-op store would depend on the Co-op's aspiration's for their store.
Development Constraints	Replacement car parking may need to be provided via on-site decked car parking. River Welland runs along the south of the site. A feasibility/ market exercise would need to be undertaken to understand the development potential of this site.

Site M1: COMMONS CAR PARK, MARKET HARBOROUGH	
Development Prospects	**Good**

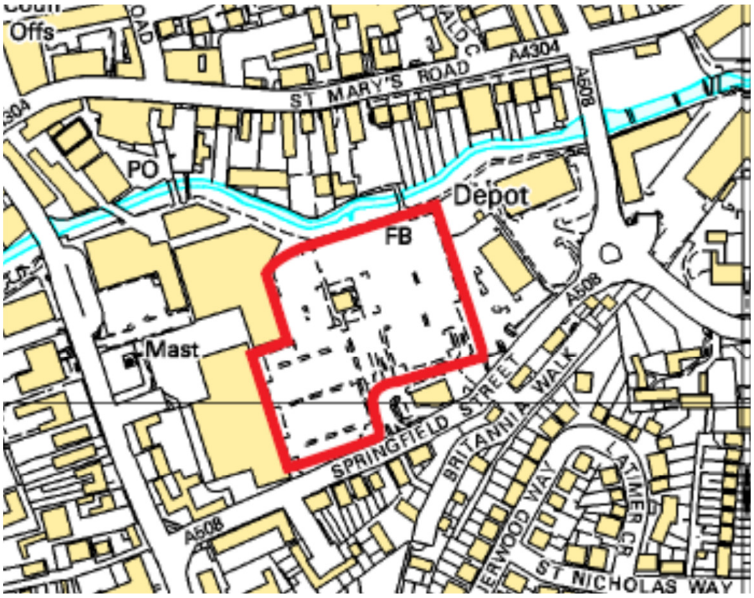
Site M2: SCHOOL LANE, MARKET HARBOROUGH



This 0.4 ha site is located to the rear of shop units fronting on to the High Street and is relatively under-utilised with low density uses. It comprises back land to the north and south of School Lane including a small public car park (c. 20 spaces), service yards and a number of vacant warehouse buildings.

Evaluation Criteria	Comments
Sequential Status	In-centre
Linkages with centre	This is a back land site, although there are good pedestrian linkages through to the High Street from School Lane.
Availability	Medium to long term: multiple ownerships would need to be assembled.
Likely Type of Development	Mixed use retail and residential scheme. Small retail units to form a small arcade development leading on to the high street.
Scale of Development	Medium Scale: Redevelopment of site to provide c. 2,000 sqm gross retail floorspace.
Commercial Potential	Back land site suitable for small secondary units with residential above.
Development Constraints	Multiple land ownership. Residential amenity with units adjoining the site to the north west and east. Loss of around 22 car parking spaces.
Development Prospects	**Reasonable**

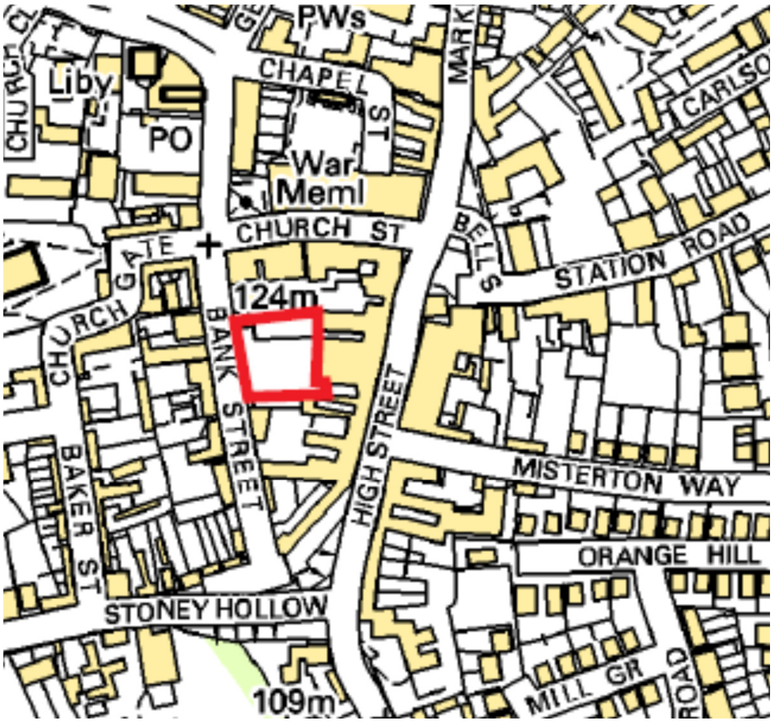
Site M3: SPRINGFIELD RETAIL PARK CAR PARK, MARKET HARBOROUGH



This large surface car park (c 1.8ha - 600 car park spaces) is relatively under-utilise and the east side adjacent to Waitrose (c. 0.5ha) could accommodate more development. The car parking serves the Sainsbury's store and the Springfield Retail Park and the town centre as a whole.

Evaluation Criteria	Comments
Sequential Status	In-centre
Linkages with centre	Good pedestrian linkages to St Mary's Place and major retail stores.
Availability	Short to Medium Term: land assembly relatively uncomplicated.
Likely Type of Development	Potential for at least 2,000 sqm of additional large format retail units. Decked car parking to replace lost spaces (about 250 spaces).
Scale of Development	Medium Scale: Potential for at least 2,000 sqm.
Commercial Potential	Viable location adjacent to the Sainsbury's and Waitrose stores and with good connections to the High Street via St Mary's Place and good road frontage on Springfield Street.
Development Constraints	Replacement car parking would need to be provided in the form of decked parking. Hall and Petrol Filling Station would need to be retained.
Development Prospects	**Good**

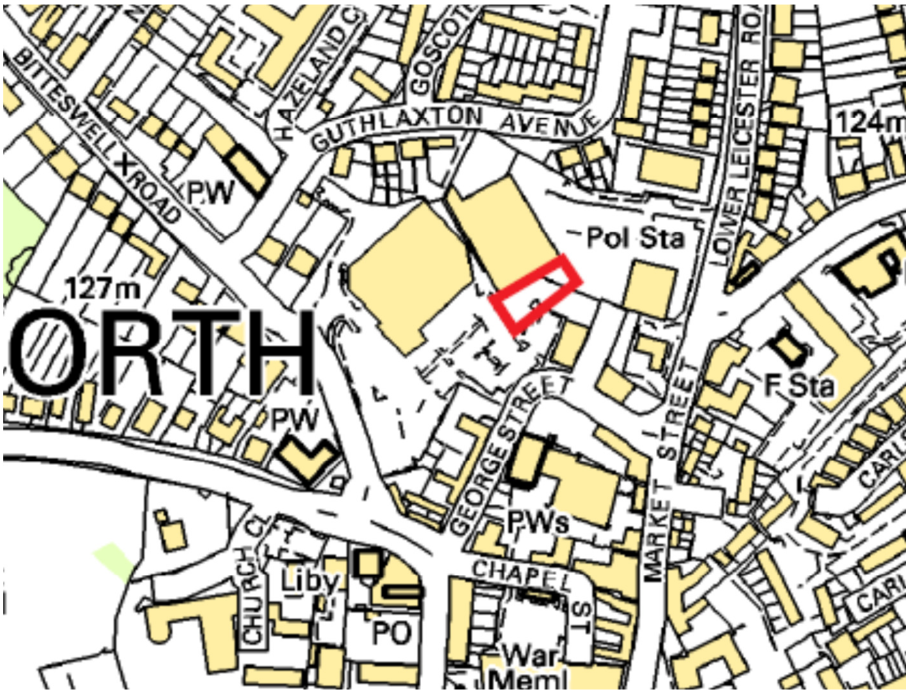
Site L1: BANK STREET, LUTTERWORTH



This back land site (about 0.3ha) is relatively under-utilised and could be redeveloped. The site has good road frontage onto Bank Street and comprises a private surface level car park to the rear of Apex House office building which is located to the east of the site.

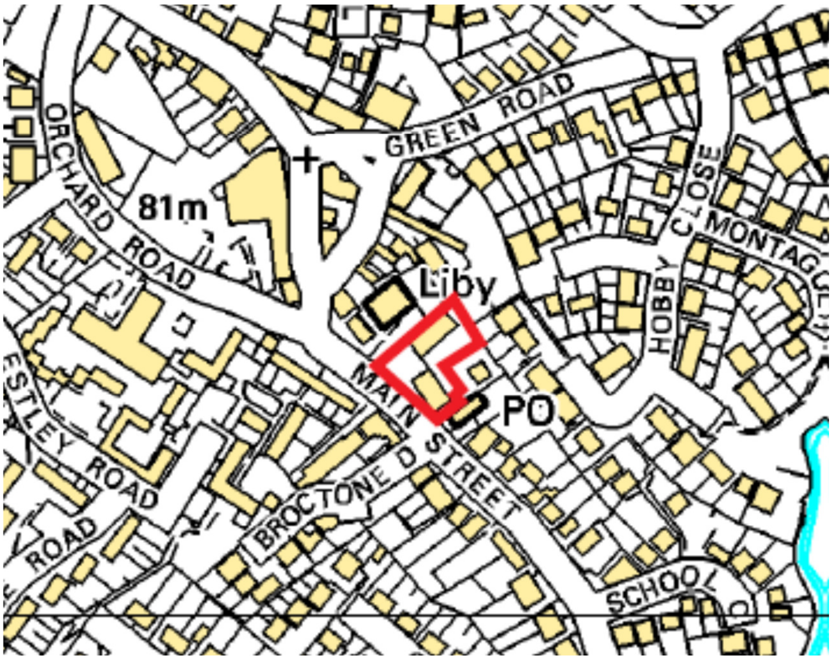
Evaluation Criteria	Comments
Sequential Status	In Centre
Linkages with centre	Site fronts onto Bank Street with potential for pedestrian linkages to the High Street.
Availability	Short to medium term: the car park is privately owned by Apex House Office building so availability is uncertain.
Likely Type of Development	4-5 retail units fronting onto Bank Street to provide around 1,000 sqm at ground floor level (A1 to A5), with residential above. Pedestrian access to be provided via High Street and Bank Street.
Scale of Development	Small Scale – c.1000 sqm.
Commercial Potential	Within secondary retail location but with good road frontage.
Development Constraints	Availability and potential multiple ownership. Need to retain service access to premises on the High Street.
Development Prospects	**Reasonable**

Site L2: MASONIC HALL CAR PARK, LUTTERWORTH



This private car park site serves the adjacent function hall (formerly the Masonic Hall). It is located to the south of the existing Waitrose store. It provides an opportunity to extend the Waitrose store.

Evaluation Criteria	Comments
Sequential Status	In Centre
Linkages with centre	Adjacent to Waitrose Unit which forms a northern gateway into the town centre.
Availability	The adjacent hall’s willingness to release some of their car park is uncertain.
Likely Type of Development	Potential extension to Waitrose store.
Scale of Development	Small Scale: up to 500 sqm gross extension to Waitrose store.
Commercial Potential	Dependent on Waitrose’s aspirations to extend store and cost of acquiring land from the adjacent hall.
Development Constraints	The existing pedestrian access to the Morrison’s store car park would need to be re-provided.
Development Prospects	**Reasonable**

Site B1: PETROL FILLING STATION, BROUGHTON ASTLEY	
	
This 0.15 ha site comprises a Petrol Filling Station and a car sales outlet. This area is relatively under-utilised and could be redeveloped.	
Evaluation Criteria	**Comments**
Sequential Status	In Centre
Linkages with centre	Located to the east of the main shopping area.
Availability	Short/Medium Term: availability uncertain but land assembly appears to be relatively uncomplicated.
Likely Type of Development	Retail unit (A1 to A5 use), potential residential above.
Scale of Development	Potential for up to 800 sqm gross of Class A1 to A5 floorspace at ground floor level.
Commercial Potential	Good street frontage within the centre boundary.
Development Constraints	Impact on residential amenity. Potential contamination from Petrol Filling Station.
Development Prospects	**Good**

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