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Planning. Design. Economics.

Harborough Retail Study Update

2016 Update

Harborough District Council

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1.0 Introduction

1.1 Nathaniel Lichfield & Partners (NLP) was commissioned by Harborough District Council to prepare a Retail Study in 2013. Due to recent changes in future population projections derived from the emerging Local Plan working housing requirement figure of 550 dpa, NLP has been commissioned to undertake a partial update based on the latest population and expenditure projections.

1.2 This report should be read alongside the Harborough Retail Study (HRS 2013).

2.0 Updated Retail Capacity

Introduction

2.1 This section re-assesses the quantitative scope for new retail floorspace in Harborough District up 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.

2.2 All monetary values expressed in this analysis are at 2014 prices unless stated otherwise, consistent with Experian's latest local expenditure estimates. The HRS 2013 was based on 2011 prices, and therefore the expenditure and turnover figures within the two reports are not directly comparable.

Methodology and Data

2.3 The quantitative analysis is based on a study area defined for the three main shopping centres within the District – Market Harborough, Lutterworth and Broughton Astley, as defined in the HRS 2013, see Appendix 1.

Consumer Expenditure

2.4 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 latest local consumer expenditure estimates for comparison and convenience goods for the study area for the base year 2014 have been obtained.

2.5 Expenditure projections per person for convenience and comparison goods are shown in Table 2 in Appendix 2 and 3, respectively.

Population

2.6 Census population estimates for 2011 were obtained and adopted in the HRS. Two population growth scenarios have been adopted.

2.7 Population projections to 2014, 2016, 2021, 2026 and 2031 are based on a dwelling completion rate of 550 dpa. This is the working annual housing requirement figure on which the emerging Local Plan is based pending the results of the Housing and Economic Development Needs Assessment (HEDNA) for the Leicester and Leicestershire Housing Market Area (HMA). It represents Harborough's current objectively assessed need (OAN) of 475 dpa, as set out in the Strategic Housing Market Assessment 2014, with an additional flexibility allowance.

2.8 The high growth scenario, based on 575 dpa, allows for a greater level of flexibility should this be necessary following the HEDNA and duty to cooperate discussions.

2.9 Population for the two growth scenarios is shown in Tables 1A and 1B in Appendix 2.

2.10 The baseline projection suggests population within the study area is projected to increase from 108,668 in 2011 to 132,352 in 2031. The high growth scenario suggests population in the study area will reach 133,383 in 2031, 1,031 higher than the baseline projection.

2.11 The end year population projection adopted in the HRS 2013 was 127,269 at 2031, 3.8% lower than the updated base line projection (132,352).

2.12 The distribution of population growth within the study area zones is based on Harborough District Council's draft settlement housing requirements and the pace of growth is based on Harborough District Council's draft housing trajectory.

Available Spending

2.13 The levels of available spending are derived by combining the population in Tables 1A and 1B with per capita spending figures Table 2 for convenience goods in Appendix 2 and comparison goods in Appendix 3.

2.14 For both convenience and comparison spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.

2.15 Special Forms of Trading (SFT) and non-store activity is included within Experian's expenditure estimates, which 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. Experian provide projections for E-tailing and other SFT. These projections have been used to exclude expenditure attributed to e-tailing through non-retail businesses, which will not directly impact on the demand for retail floorspace.

2.16 Based on Experian's latest data SFT (including non-retail e-tailing but excluding e-tail through retail businesses) is 3% and 12.4% of total convenience and comparison goods expenditure respectively in 2016. The projections provided by Experian suggest that these percentage shares could increase to 5.8% and 14.6% by 2031.

2.17 As a consequence of baseline growth in population and per capita spending, convenience goods spending within the study area is forecast to increase from £239.61 million at 2014 to £276.6 million at 2031, as shown in Table 3A in Appendix 2. The high population growth projections show a marginally higher figure of £278.69 million of convenience goods expenditure at 2031.

2.18 The end year convenience goods projection adopted in the HRS 2013 was £300.21 million at 2031 (£274.42 million adjusted to 2014 prices). The previous projection was 8.5% higher, despite lower population growth, because

Experian's latest convenience expenditure growth projections are much lower (0.1% per annum compared with 0.8% per annum adopted in 2013).

2.19 For the baseline growth, comparison goods spending is forecast to increase from £374.8 million at 2014 to £753.21 million at 2031, as shown in Table 3A in Appendix 3. The high population growth projection is £758.92 million of comparison goods expenditure in 2031. These figures relate to real growth and exclude inflation.

2.20 The end year comparison goods projection adopted in the HRS 2013 was £592.7 million at 2031. The previous projection was 21% lower, due to lower population growth (-3.7%) and because Experian's latest comparison expenditure growth projections are higher (average of 3.1% per annum compared with 2.9% per annum adopted in 2013).

Quantitative Capacity for Convenience Floorspace

2.21 The results of the household shopper questionnaire survey, undertaken by NEMS in August/September 2013 were used to estimate base year shopping patterns within the study area. The base year market shares are shown Table 4A in Appendix 2. The base year market shares remain robust because retail provision in the sub-region has not changed significantly since 2013.

2.22 Table 5 in Appendix 2 indicates that the level of convenience goods expenditure attracted to shops/stores in the Harborough District in 2014 is estimated to be £165.02 million.

2.23 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Mintel in Retail Rankings 2016. 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 listed in Table 10A in Appendix 2, 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.

2.24 Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.

2.25 Average sales densities are not widely available for smaller convenience shops, particularly independent retailers. An average sales density of £4,500 per sq.m was been adopted for small convenience shops in the HRS 2013. This has been inflated to 2014 prices to £4,923 per sq.m.

2.26 The total benchmark turnover of existing convenience sales floorspace within Harborough District is £130.9 million (excluding local shopping facilities outside the main town and district centres), as shown in Table 10A in Appendix 2.

2.27 The assessment of shopping patterns suggests that convenience goods expenditure available to facilities (excluding local shops) in the District at 2014 is £163.48 million. These figures suggest that collectively convenience retail facilities in the District are trading 24.9% above national average levels.

2.28 The projected levels of available convenience goods expenditure at 2016, 2021, 2026 and 2031 is shown at Tables 6 to 9 in Appendix 2. The projections (post 2016) are based on adjusted market shares (as shown in Table 4B in Appendix 2) to reflect the implementation of commitments, primarily the proposed Aldi store in Broughton Astley, as shown in Table 10B in Appendix 2.

2.29 The total level of available convenience goods expenditure available for shops in Harborough between 2014 and 2031 is summarised in Table 11 (Appendix 2). The benchmark turnover of existing convenience floorspace (Table 10A) and food store commitments (Table 10B) have been subtracted from the estimates of available expenditure to provide surplus expenditure estimates.

2.30 The baseline growth estimates of surplus/deficit expenditure are converted into net floorspace projections in Table 12, Appendix 2. The projections based on the high population growth are shown in Table 14. These floorspace projections relate only to convenience sales floorspace and exclude any comparison sales within food stores.

2.31 Food store commitments are expected to absorb some but not all of the projected surplus convenience goods expenditure. The surplus at 2016 (£35.33 million) is expected to reduce to £22.14 million in 2021.

2.32 Continued expenditure growth after 2021 will generate an expenditure surplus of £30.65 million in 2026, increasing to £39.30 million in 2031, as shown in Table 11 in Appendix 2. The baseline projections could support 1,727 sq.m net (2,467 sq.m gross) of convenience goods floorspace by 2021 in the District as a whole. The 2026 projection is 2,484 sq.m net (3,549 sq.m gross) and the 2031 projection is 3,256 sq.m net (4,652 sq.m gross).

2.33 The HRS 2013 projection was 4,280 sq.m net (6,114 sq.m gross) up to 2031. The updated floorspace projection is lower (3,256 sq.m net or 4,652 sq.m gross) due to Experian's lower forecast expenditure growth and the expected implementation of commitments.

Quantitative Capacity for Comparison Floorspace

2.34 Harborough District attracts £122.61 million of comparison goods expenditure in total in 2014 (Table 5 in Appendix 3). The future level of comparison goods expenditure available to shops in Harborough District has been projected to 2016, 2021, 2026 and 2031, as shown in Tables 6 to 9 in Appendix 3.

2.35 Future available expenditure is compared with the projected turnover of existing comparison goods retail facilities within the District in order to provide estimates of surplus expenditure, as shown in Table 11.

2.36 The baseline estimates of surplus/deficit expenditure are converted into net floorspace projections in Table 12, Appendix 3.

2.37 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. Table 11 therefore assumes that the existing turnover of comparison floorspace will increase its benchmark turnover in real terms. A growth rate of 2% per annum is adopted as recommended by Experian.

2.38 Commitments and completions are expected to absorb some of the expenditure growth up to 2021, but continued growth up to 2026 could support 5,229 sq.m net (6,973 sq.m gross) of comparison goods floorspace in the District as a whole, as shown in Table 12 in Appendix 3. This will increase to 9,046 sq.m net (12,062 sq.m gross) at 2031.

2.39 The HRS 2013 comparison floorspace projections were much lower at 4,280 sq.m net (6,114 sq.m gross) up to 2031. The updated figures are much higher due to a number of factors, as follows:

1. higher population projections (an additional 4,877 people at 2031);
2. Experian previously predicted a 56.4% increase in comparison goods expenditure per person up to 2031, whilst Experian's latest forecasts suggest 71% growth.
3. Experian's recommended growth in turnover efficiency has remained unchanged (2% per annum) despite the increase in expenditure growth, therefore growth in turnover efficiency now absorbs a much lower proportion of total comparison goods expenditure growth.

2.40 Taken together these factors have a significant impact on the end year comparison goods floorspace projections. This significant change underlines the caution required in adopting very long term projections for planning purposes. Small changes in assumptions can lead to wide variations in end results for the long term projections i.e. between 2026 and 2031.

High Growth Sensitivity Analysis

2.41 As indicated above, the retail floorspace projections adopt the baseline growth projections based on 550 dpa (SHMA 2014 OAN plus a flexibility allowance). The alternative scenario adopts a higher annual housing requirement figure of 575 to allow for additional flexibility pending HEDNA results and duty to cooperate discussions. The high growth convenience goods retail floorspace capacity figures are shown in Table 14 in Appendix 2. The high growth comparison goods retail floorspace capacity figures are shown in Table 14 in Appendix 3.

2.42 A comparison between the district wide floorspace base line and high projections is shown below.

2.43 The margin of variation for the very long term projections at 2031 is higher for convenience goods floorspace, i.e. 4.9% for convenience goods floorspace, compared with only 1% for comparison goods. The need for convenience goods floorspace is predominantly fuelled by population growth, whilst comparison goods floorspace is predominantly fuelled by expenditure growth per person.

Table 2.1 Floorspace Capacity Summary - 2031 Projections

Scenario/Location	Convenience Goods Floorspace by 2031 Sq.M Gross	Comparison Goods Floorspace by 2031 Sq.M Gross
Baseline Growth		
Market Harborough	3,424	9,739
Lutterworth	957	1,658
Broughton Astley	317	235
Other	- 46	430
Total	**4,652**	**12,062**
High Growth		
Market Harborough	3,551	9,844
Lutterworth	1,008	1,670
Broughton Astley	333	236
Other	-10	430
Total	**4,882**	**12,180**
Variation	+4.9%	- 1.0%

2.44 It should be noted that these projections do not take into account the reoccupation of any vacant floorspace within town centres. A fall in the shop vacancy rate in the future will help to absorb some of this floorspace capacity shown above.

3.0 Conclusions

3.1 This report provides an update of the District wide needs assessment for retail floorspace in Harborough (HRS 2013). The conclusions are summarised below.

Meeting Customer's Needs in Harborough

3.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development and main town centre uses over the plan period.

3.3 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 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. A sequential approach to site selection should be adopted.

3.4 Long term floorspace capacity forecasts beyond 2026 are susceptible to change due to unforeseen circumstances. Long term projections beyond 2026 are not only subject to changes in terms of population growth, but also growth in expenditure per capita and growth in turnover efficiencies. Experian's recommended growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored. Small variations in Experian's recommended growth rates (i.e. published annually) can lead to large variations in floorspace capacity when projected over a long period, therefore long term projections must be treated with caution and kept under review.

3.5 The implications of major retail development within and surrounding the District should also be monitored along with the affect proposals may have on the demand for additional development in Harborough.

Retail Floorspace Projections

3.6 The quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new retail development within Harborough District. The baseline population projections suggest new floorspace (over and above commitments) should be distributed as shown in Table 3.1 and Table 3.2.

3.7 The floorspace projections do not take into account the potential re-occupation of vacant shop units. Future retail development should be phased in accordance with the tables above. The identification of opportunities to meet the short and medium term floorspace projections up to 2026 should be the priority, including the potential to accommodate growth within vacant shop premises.

3.8 In the short to medium term it will not be necessary to bring forward opportunities to accommodate longer term growth after 2026, and these long term projections will need to be monitored and kept under review. Broad areas where long term growth may be accommodated should be identified, and if necessary brought forward if the projected levels of growth are achieved.

Table 3.1: Convenience Goods Retail Floorspace Projections (Baseline Growth)

Centre	Additional Retail Floorspace Sq.m Gross (1) (assuming net to gross ratio of 70%)			
	Up to 2021	2021-2026	2026-2031	Total Up 2031
Market Harborough	2,100	700	600	**3,400**
Lutterworth	500	200	300	**1,000**
Broughton Astley	200	-	100	**300**
Other (2)	-	-	-	**-**
Total	**2,800**	**900**	**1,500**	**4,700**

(1) over and above commitments. (2) Negative floorspace projections excluded

Table 3.2: Comparison Goods Retail Floorspace Projections (Baseline Growth)

Centre	Additional Retail Floorspace Sq.m Gross (1) (assuming net to gross ratio of 75%)			
	Up to 2021	2021-2026	2026-2031	Total Up to 2031
Market Harborough	1,600	3,900	4,200	**9,700**
Lutterworth	600	500	600	**1,700**
Broughton Astley	100	-	100	**200**
Other	100	200	200	**500**
Total	**2,400**	**4,600**	**5,100**	**12,100**

(1) over and above commitments

Strategy Implications

Market Harborough

3.9 The combined retail floorspace capacity projection for Market Harborough is around 13,100 sq.m gross in up to 2031. 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. 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.

Lutterworth

3.10 The retail floorspace capacity projection is around 2,700 sq.m gross. 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.

Broughton Astley

3.11 There is limited retail capacity for additional facilities in Broughton Astley up to 2031, i.e. 500 sq.m gross over and above the proposed Aldi food store. Vacant shop units and small scale extensions/infill development could meet this projection over the plan period.

Scale of Retail Development

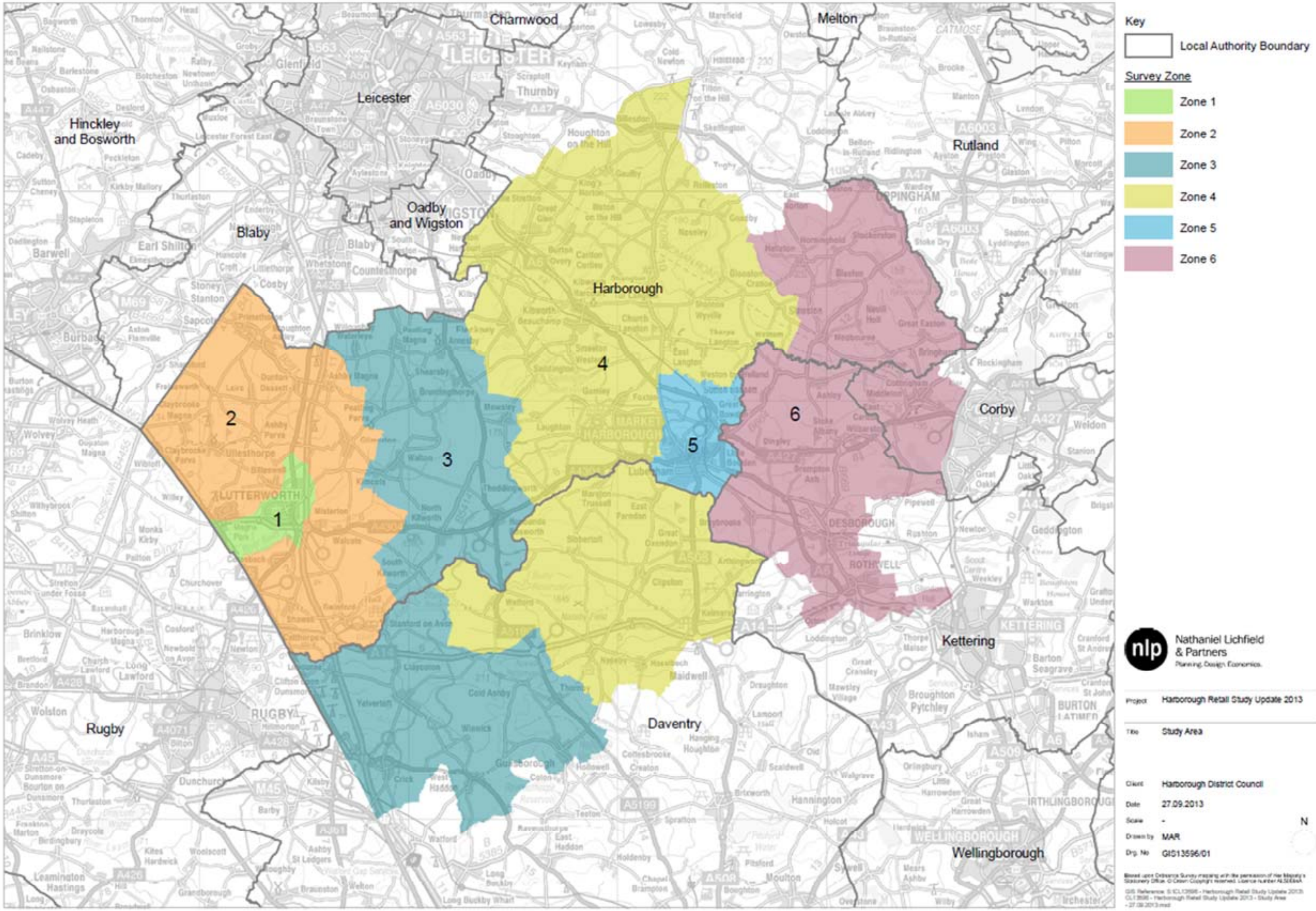
3.12 If there is no locally set threshold, the NPPF default threshold is 2,500 sq.m gross where a retail impact will be required. If the NPPF threshold was adopted, then a single development proposal could exceed the entire short to medium term floorspace projections for towns in the District without the need for a retail impact assessment. The NPPF threshold of 2,500 sq.m gross is inappropriate as a blanket threshold within Harborough District, the following thresholds are recommended for all retail development outside the primary shopping area:

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

2 500 sq.m gross elsewhere.

3.13 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.

Appendix 1 Study Area


Key
Local Authority Boundary
Survey Zone
Zone 1
Zone 2
Zone 3
Zone 4
Zone 5
Zone 6
1
2
3
4
5
6
Charnwood
Melton
Leicester
Hinckley and Bosworth
Rutland
Oadby and Wigston
Blaby
Harborough
Corby
Kettering
Daventry
Rugby
Wellingborough
Nathaniel Lichfield & Partners
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
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Appendix 2 – Convenience Assessment

Table 1A: Study Area Population Projections (Baseline)

Total Population	2011	2014	2016	2021	2026	2031
Zone 1 - Lutterworth Urban	9,353	9,925	10,306	11,258	12,211	13,164
Zone 2 - Lutterworth Rural	16,008	16,363	16,599	17,190	17,781	18,372
Zone 3 - Kilworth	10,976	11,141	11,253	11,569	11,825	12,121
Zone 4 - Market Harborough Rural West	24,956	25,559	25,962	26,992	27,985	29,002
Zone 5 - Market Harborough Urban	22,911	24,264	25,165	27,420	29,674	31,929
Zone 6 - Market Harborough Rural East	24,464	24,931	25,247	26,203	26,896	27,764
Total	**108,668**	**112,182**	**114,532**	**120,632**	**126,372**	**132,352**

Sources: *Experian 2011 Census and SNPP 2015 projections for Northamptonshire*
Baselien growth based on 550 dpa (SHMA 2014 OAN plus flexible allowance).

Table 1B: Study Area Population Projections (High Growth)

Total Population	2011	2014	2016	2021	2026	2031
Zone 1 - Lutterworth Urban	9,353	9,955	10,356	11,358	12,361	13,363
Zone 2 - Lutterworth Rural	16,008	16,381	16,630	17,252	17,874	18,496
Zone 3 - Kilworth	10,976	11,145	11,259	11,581	11,845	12,147
Zone 4 - Market Harborough Rural West	24,956	25,587	26,009	27,087	28,127	29,192
Zone 5 - Market Harborough Urban	22,911	24,334	25,283	27,656	30,028	32,401
Zone 6 - Market Harborough Rural East	24,464	24,934	25,252	26,213	26,912	27,785
Total	**108,668**	**112,336**	**114,789**	**121,147**	**127,146**	**133,383**

Sources: *Experian 2011 Census and SNPP 2015 projections for Northamptonshire*
High growth projection based on 575 dpa plus flexible allowance.

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

	2014	2016	2021	2026	2031
Zone 1 - Lutterworth Urban	2,024	2,012	1,997	1,992	1,987
Zone 2 - Lutterworth Rural	2,166	2,153	2,137	2,132	2,127
Zone 3 - Kilworth	2,217	2,204	2,187	2,182	2,177
Zone 4 - Market Harborough Rural West	2,240	2,226	2,209	2,204	2,199
Zone 5 - Market Harborough Urban	1,984	1,972	1,957	1,953	1,948
Zone 6 - Market Harborough Rural East	2,165	2,152	2,136	2,131	2,126

Sources:
Experian 2014
Experian Forecast Growth Rates - October 2015

Data in 2014 prices
Excludes Special Forms of Trading

Table 3A: Total Convenience Goods Expenditure (£m) - Base Line Population

Total Expenditure £M	2014	2016	2021	2026	2031
Zone 1 - Lutterworth Urban	20.09	20.73	22.48	24.32	26.16
Zone 2 - Luuerworth Rural	35.45	35.74	36.73	37.91	39.07
Zone 3 - Kilworth	24.70	24.80	25.30	25.80	26.38
Zone 4 - Market Harborough Rural West	57.24	57.79	59.63	61.68	63.77
Zone 5 - Market Harborough Urban	48.14	49.63	53.67	57.94	62.19
Zone 6 - Market Harborough Rural East	53.99	54.34	55.97	57.32	59.02
Total	**239.61**	**243.02**	**253.78**	**264.97**	**276.60**

Source: Tables 1A and 2

Table 3B: Total Convenience Goods Expenditure (£m) - High Population Growth

Total Expenditure £M	2014	2016	2021	2026	2031
Zone 1 - Lutterworth Urban	20.15	20.83	22.68	24.62	26.55
Zone 2 - Luuerworth Rural	35.49	35.81	36.87	38.11	39.34
Zone 3 - Kilworth	24.71	24.81	25.33	25.84	26.44
Zone 4 - Market Harborough Rural West	57.30	57.89	59.84	61.99	64.18
Zone 5 - Market Harborough Urban	48.28	49.86	54.13	58.63	63.11
Zone 6 - Market Harborough Rural East	53.99	54.35	55.99	57.35	59.07
Total	**239.93**	**243.55**	**254.83**	**266.54**	**278.69**

Source: Tables 1B and 2

Table 4A: Base Year 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%	40.0%	17.8%	38.9%	90.3%	31.6%	5.0%
Lutterworth	79.3%	39.7%	27.0%	0.8%	0.0%	0.0%	5.0%
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%**	**99.0%**	**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%**	**139.3%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey, August 2013

Table 4B: Future Convenience Goods Market Shares 2021 onwards (%)

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%**	
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%	18.6%	6.4%	36.7%	1.8%	0.6%	n/a
Rugby	14.5%	2.3%	30.2%	0.1%	0.0%	0.0%	n/a
Other outside Harborough	1.8%	5.4%	11.5%	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 with NLP adjustments

Table 5: Base Year Convenience Goods Expenditure Patterns (£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 2014	**20.09**	**35.45**	**24.70**	**57.24**	**48.14**	**53.99**		**239.61**
Market Harborough	0.00	14.18	4.40	22.27	43.47	17.06	5.34	106.71
Lutterworth	15.93	14.07	6.67	0.46	0.00	0.00	1.95	39.09
Broughton Astley	0.00	6.38	0.15	0.00	0.00	0.16	0.35	7.04
Fleckney	0.00	0.00	0.27	2.98	0.00	0.00	0.17	3.42
Great Glen	0.00	0.00	0.00	2.86	0.00	0.00	0.15	3.01
Kibworth	0.00	0.00	0.12	3.78	0.10	0.00	0.21	4.21
Other Harborough	0.00	0.46	0.54	0.46	0.00	0.00	0.08	1.54
Harborough Total	**15.93**	**35.09**	**12.15**	**32.80**	**43.57**	**17.22**	**8.25**	**165.02**
Corby	0.04	0.35	0.12	1.14	2.21	7.45	n/a	11.33
Kettering	0.00	0.00	0.00	0.86	1.40	24.94	n/a	27.20
Leicester/Wigston	0.84	9.82	1.61	21.01	0.87	0.32	n/a	34.47
Rugby	2.91	1.24	7.93	0.06	0.00	0.00	n/a	12.14
Other outside Harborough	0.36	2.87	2.89	1.37	0.10	4.05	n/a	11.64
Grand Total	**20.09**	**49.38**	**24.70**	**57.24**	**48.14**	**53.99**	**8.25**	**261.79**

Source: Tables 3A and 4A

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

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	**20.73**	**35.74**	**24.80**	**57.79**	**49.63**	**54.34**		**243.02**
Market Harborough	0.00	14.30	4.41	22.48	44.81	17.17	5.43	108.60
Lutterworth	16.44	14.19	6.70	0.46	0.00	0.00	1.99	39.78
Broughton Astley	0.00	6.43	0.15	0.00	0.00	0.16	0.36	7.10
Fleckney	0.00	0.00	0.27	3.00	0.00	0.00	0.17	3.45
Great Glen	0.00	0.00	0.00	2.89	0.00	0.00	0.15	3.04
Kibworth	0.00	0.00	0.12	3.81	0.10	0.00	0.21	4.25
Other Harborough	0.00	0.46	0.55	0.46	0.00	0.00	0.08	1.55
Harborough Total	**16.44**	**35.38**	**12.20**	**33.11**	**44.91**	**17.33**	**8.39**	**167.77**
Corby	0.04	0.36	0.12	1.16	2.28	7.50	n/a	11.46
Kettering	0.00	0.00	0.00	0.87	1.44	25.10	n/a	27.41
Leicester/Wigston	0.87	9.90	1.61	21.21	0.89	0.33	n/a	34.81
Rugby	3.01	1.25	7.96	0.06	0.00	0.00	n/a	12.27
Other outside Harborough	0.37	2.89	2.90	1.39	0.10	4.08	n/a	11.73
Grand Total	**20.73**	**49.79**	**24.80**	**57.79**	**49.63**	**54.34**	**8.39**	**265.45**

Source: Tables 3A and 4A

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

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	**22.48**	**36.73**	**25.30**	**59.63**	**53.67**	**55.97**		**253.78**
Market Harborough	0.00	0.15	4.30	23.20	48.46	17.69	4.94	98.73
Lutterworth	17.83	9.59	6.53	0.48	0.00	0.00	1.81	36.23
Broughton Astley	0.00	16.53	1.27	0.00	0.00	0.17	2.00	19.96
Fleckney	0.00	0.00	0.28	3.10	0.00	0.00	0.18	3.56
Great Glen	0.00	0.00	0.00	2.98	0.00	0.00	0.16	3.14
Kibworth	0.00	0.00	0.10	3.94	0.11	0.00	0.22	4.36
Other Harborough	0.00	0.44	0.53	0.48	0.00	0.00	0.08	1.53
Harborough Total	**17.83**	**26.71**	**13.00**	**34.17**	**48.57**	**17.85**	**9.37**	**167.50**
Corby	0.04	0.37	0.13	1.19	2.47	7.72	n/a	11.92
Kettering	0.00	0.00	0.00	0.89	1.56	25.86	n/a	28.31
Leicester/Wigston	0.94	6.83	1.62	21.88	0.97	0.34	n/a	32.58
Rugby	3.26	0.84	7.64	0.06	0.00	0.00	n/a	11.80
Other outside Harborough	0.40	1.98	2.91	1.43	0.11	4.20	n/a	11.03
Grand Total	**22.48**	**36.73**	**25.30**	**59.63**	**53.67**	**55.97**	**9.37**	**263.15**

Source: Tables 3 and 4B

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	**24.32**	**37.91**	**25.80**	**61.68**	**57.94**	**57.32**		**264.97**
Market Harborough	0.00	0.15	4.39	23.99	52.32	18.11	5.21	104.17
Lutterworth	19.29	9.89	6.66	0.49	0.00	0.00	1.91	38.24
Broughton Astley	0.00	17.06	1.29	0.00	0.00	0.17	2.06	20.58
Fleckney	0.00	0.00	0.28	3.21	0.00	0.00	0.18	3.67
Great Glen	0.00	0.00	0.00	3.08	0.00	0.00	0.16	3.25
Kibworth	0.00	0.00	0.10	4.07	0.12	0.00	0.23	4.52
Other Harborough	0.00	0.45	0.54	0.49	0.00	0.00	0.08	1.57
Harborough Total	**19.29**	**27.56**	**13.26**	**35.34**	**52.44**	**18.28**	**9.83**	**176.00**
Corby	0.05	0.38	0.13	1.23	2.67	7.91	n/a	12.37
Kettering	0.00	0.00	0.00	0.93	1.68	26.48	n/a	29.09
Leicester/Wigston	1.02	7.05	1.65	22.64	1.04	0.34	n/a	33.75
Rugby	3.53	0.87	7.79	0.06	0.00	0.00	n/a	12.25
Other outside Harborough	0.44	2.05	2.97	1.48	0.12	4.30	n/a	11.35
Grand Total	**24.32**	**37.91**	**25.80**	**61.68**	**57.94**	**57.32**	**9.83**	**274.79**

Source: Tables 3 and 4B

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	**26.16**	**39.07**	**26.38**	**63.77**	**62.19**	**59.02**		**276.60**
Market Harborough	0.00	0.16	4.49	24.81	56.16	18.65	5.49	109.75
Lutterworth	20.74	10.20	6.81	0.51	0.00	0.00	2.01	40.27
Broughton Astley	0.00	17.58	1.32	0.00	0.00	0.18	2.12	21.20
Fleckney	0.00	0.00	0.29	3.32	0.00	0.00	0.19	3.80
Great Glen	0.00	0.00	0.00	3.19	0.00	0.00	0.17	3.36
Kibworth	0.00	0.00	0.11	4.21	0.12	0.00	0.23	4.67
Other Harborough	0.00	0.47	0.55	0.51	0.00	0.00	0.08	1.61
Harborough Total	**20.74**	**28.41**	**13.56**	**36.54**	**56.28**	**18.83**	**10.29**	**184.66**
Corby	0.05	0.39	0.13	1.28	2.86	8.15	n/a	12.86
Kettering	0.00	0.00	0.00	0.96	1.80	27.27	n/a	30.03
Leicester/Wigston	1.10	7.27	1.69	23.40	1.12	0.35	n/a	34.93
Rugby	3.79	0.90	7.97	0.06	0.00	0.00	n/a	12.72
Other outside Harborough	0.47	2.11	3.03	1.53	0.12	4.43	n/a	11.70
Grand Total	**26.16**	**39.07**	**26.38**	**63.77**	**62.19**	**59.02**	**10.29**	**286.89**

Source: Tables 3 and 4B

Table 10A: Convenience Goods Floorspace and Benchmark Turnover (2014 Prices)

Store/Town	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Market Harborough					
Sainsbury's , Market Harborough TC	2,263	80%	1,810	£11,690	£21.16
Waitrose, Market Harborough TC	1,543	90%	1,389	£11,665	£16.20
Aldi, Market Harborough	929	85%	790	£11,557	£9.13
Co-op, Market Harborough	1,029	85%	875	£8,903	£7.79
Lidl, Market Harborough	929	85%	790	£7,723	£6.10
B&M, Market Harborough	450	20%	90	£6,000	£0.54
Tesco Express, Rockingham Rd.	280	95%	266	£11,058	£2.94
Londis, Western Ave. Market Harborough	224	95%	213	£6,145	£1.31
Spar,Coventry Road, Market Harborough	170	95%	162	£7,281	£1.18
Tesco Metro, Market Harborough TC	556	90%	500	£11,058	£5.53
Majestic Wine	260	100%	260	£4,788	£1.24
Other Market Harborough	1,400	95%	1,330	£4,923	£6.55
Sub-Total	**10,033**		**8,474**		**£79.67**
Lutterworth					
Morrison's, Lutterworth	1,672	85%	1,421	£10,849	£15.42
Co-op, George St, Lutterworth	724	90%	652	£8,903	£5.80
Waitrose, Lutterworth	826	90%	743	£11,665	£8.67
Other Lutterworth	500	95%	475	£4,923	£2.34
Sub-Total	**3,722**		**3,291**		**£32.23**
Other Harborough					
Co-op, Broughton Astley	596	95%	566	£8,903	£5.04
Spar, Broughton Astley	140	95%	133	£7,281	£0.97
Other Broughton Astley	200	95%	190	£4,923	£0.94
Co-op, Fleckney	540	95%	513	£8,903	£4.57
Other Fleckney	50	95%	48	£4,923	£0.23
Co-op, Great Glen	203	95%	193	£8,903	£1.72
Co-op, Kibworth	600	95%	570	£8,903	£5.07
Other Kibworth	100	95%	95	£4,923	£0.47
Sub-Total	**2,429**		**2,308**		**£19.01**
Total	**16,184**		**14,073**	**£9,302**	**£130.90**

Source: IGD, Valuation Office, Goad and NLP site surveys and Mintels Retail Rankings 2016

Table 10B: Convenience Goods Commitments Floorspace and Benchmark Turnover (2014 Prices)

Town/Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Aldl, Broughton Astley	1,254	80%	1,003	£11,557	£11.59
B&M, Former Focus, Market Harborough	2,200	10%	220	£6,000	£1.32

Source: Harborough DC and Retail Rankings 2016

Table 11: Summary of Convenience Goods Expenditure Capacity 2014 to 2031 - Baseline

Centre	2014	2016	2021	2026	2031
Available Expenditure in District (£m)					
Market Harborough	106.71	108.60	98.73	104.17	109.75
Lutterworth	39.09	39.78	36.23	38.24	40.27
Broughton Astley	7.04	7.10	19.96	20.58	21.20
Fleckney	3.42	3.45	3.56	3.67	3.80
Great Glen	3.01	3.04	3.14	3.25	3.36
Kibworth	4.21	4.25	4.36	4.52	4.67
Other Harborough	1.54	1.55	1.53	1.57	1.61
Total	**165.02**	**167.77**	**167.50**	**176.00**	**184.66**
Benchmark Turnover of Existing Facilities (£m)					
Market Harborough *	79.67	79.67	80.99	80.99	80.99
Lutterworth	32.23	32.23	32.23	32.23	32.23
Broughton Astley*	6.94	6.94	18.54	18.54	18.54
Fleckney	4.80	4.80	4.80	4.80	4.80
Great Glen	1.72	1.72	1.72	1.72	1.72
Kibworth	5.54	5.54	5.54	5.54	5.54
Other Harborough	1.54	1.54	1.54	1.54	1.54
Total	**132.44**	**132.44**	**145.35**	**145.35**	**145.35**
Surplus/Deficit Expenditure (£m)					
Market Harborough	27.05	28.94	17.74	23.19	28.76
Lutterworth	6.86	7.55	4.00	6.01	8.04
Broughton Astley	0.10	0.16	1.42	2.04	2.66
Fleckney	-1.38	-1.35	-1.24	-1.13	-1.01
Great Glen	1.30	1.32	1.42	1.53	1.64
Kibworth	-1.33	-1.29	-1.18	-1.03	-0.87
Other Harborough	0.00	0.01	-0.01	0.03	0.07
Total	**32.58**	**35.33**	**22.14**	**30.65**	**39.30**

Source: Tables 5 and 10 ** convenience goods commitments added at 2021*

Table 12: Convenience Goods Floorspace Capacity 2014 to 2031 - Base Line

Centre	2014	2016	2021	2026	2031
Turnover Density New Floorspace (£ per sq.m)					
Large food stores	£12,000	£12,000	£12,000	£12,000	£12,000
Local shops	£5,000	£5,000	£5,000	£5,000	£5,000
Floorspace Requirement (sq.m net)					
Market Harborough	2,254	2,411	1,478	1,932	2,397
Lutterworth	571	629	333	501	670
Broughton Astley	8	13	118	170	222
Fleckney	-276	-270	-249	-225	-201
Great Glen	259	265	284	306	328
Kibworth	-267	-259	-236	-205	-174
Other Harborough	0	2	-3	6	15
Total	**2,549**	**2,791**	**1,727**	**2,484**	**3,256**
Floorspace Requirement (sq.m gross)					
Market Harborough	3,220	3,445	2,112	2,760	3,424
Lutterworth	816	898	476	716	957
Broughton Astley	12	19	169	243	317
Fleckney	-395	-386	-355	-322	-287
Great Glen	370	378	406	437	468
Kibworth	-381	-369	-337	-293	-249
Other Harborough	0	3	-4	8	21
Total	**3,642**	**3,988**	**2,467**	**3,549**	**4,652**

Source: Table 11

Table 13: Summary of Convenience Goods Expenditure Capacity 2014 to 2031 - High Growth

Centre	2014	2016	2021	2026	2031
Available Expenditure in District (£m)					
Market Harborough	106.89	108.90	99.26	104.98	110.82
Lutterworth	39.16	39.89	36.44	38.56	40.69
Broughton Astley	7.05	7.11	20.03	20.68	21.33
Fleckney	3.42	3.46	3.57	3.69	3.82
Great Glen	3.02	3.05	3.15	3.26	3.38
Kibworth	4.21	4.26	4.38	4.54	4.70
Other Harborough	1.54	1.55	1.53	1.57	1.62
Total	**165.29**	**168.22**	**168.36**	**177.29**	**186.37**
Benchmark Turnover of Existing Facilities (£m)					
Market Harborough *	79.67	79.67	80.99	80.99	80.99
Lutterworth	32.23	32.23	32.23	32.23	32.23
Broughton Astley *	6.94	6.94	18.54	18.54	18.54
Fleckney	4.80	4.80	4.80	4.80	4.80
Great Glen	1.72	1.72	1.72	1.72	1.72
Kibworth	5.54	5.54	5.54	5.54	5.54
Other Harborough	1.54	1.54	1.54	1.54	1.54
Total	**132.44**	**132.44**	**145.35**	**145.35**	**145.35**
Surplus/Deficit Expenditure (£m)					
Market Harborough	27.23	29.24	18.28	23.99	29.83
Lutterworth	6.93	7.66	4.21	6.33	8.46
Broughton Astley	0.11	0.17	1.49	2.14	2.80
Fleckney	-1.38	-1.34	-1.23	-1.11	-0.98
Great Glen	1.30	1.33	1.43	1.55	1.66
Kibworth	-1.33	-1.28	-1.16	-1.00	-0.84
Other Harborough	0.00	0.01	-0.01	0.03	0.08
Total	**32.85**	**35.78**	**23.00**	**31.93**	**41.01**

** convenience goods commitments added at 2021*

Table 14: Convenience Goods Floorspace Capacity 2014 to 2031 - High Growth

Centre	2014	2016	2021	2026	2031
Turnover Density New Floorspace (£ per sq.m)					
Large food stores	£12,000	£12,000	£12,000	£12,000	£12,000
Local shops	£5,000	£5,000	£5,000	£5,000	£5,000
Floorspace Requirement (sq.m net)					
Market Harborough	2,269	2,436	1,523	1,999	2,486
Lutterworth	577	639	351	528	705
Broughton Astley	9	14	124	178	233
Fleckney	-115	-112	-103	-92	-82
Great Glen	108	111	119	129	138
Kibworth	-111	-107	-97	-84	-70
Other Harborough	0	1	-1	3	7
Total	**2,737**	**2,981**	**1,917**	**2,661**	**3,418**
Floorspace Requirement (sq.m gross)					
Market Harborough	3,241	3,480	2,176	2,856	3,551
Lutterworth	824	912	501	754	1,008
Broughton Astley	13	20	177	255	333
Fleckney	-164	-160	-147	-132	-117
Great Glen	155	158	171	184	198
Kibworth	-158	-153	-139	-119	-100
Other Harborough	0	1	-1	4	10
Total	**3,911**	**4,259**	**2,738**	**3,801**	**4,882**

Source: Table 13

Appendix 3 – Comparison Assessment

Table 1A: Study Area Population Projections (Baseline)

Total Population	2011	2014	2016	2021	2026	2031
Zone 1 - Lutterworth Urban	9,353	9,925	10,306	11,258	12,211	13,164
Zone 2 - Lutterworth Rural	16,008	16,363	16,599	17,190	17,781	18,372
Zone 3 - Kilworth	10,976	11,141	11,253	11,569	11,825	12,121
Zone 4 - Market Harborough Rural West	24,956	25,559	25,962	26,992	27,985	29,002
Zone 5 - Market Harborough Urban	22,911	24,264	25,165	27,420	29,674	31,929
Zone 6 - Market Harborough Rural East	24,464	24,931	25,247	26,203	26,896	27,764
Total	**108,668**	**112,182**	**114,532**	**120,632**	**126,372**	**132,352**

Sources: *Experian 2011 Census and SNPP 2015 projections for Northamptonshire*
Baselien growth based on 550 dpa (SHMA 2014 OAN plus flexible allowance).

Table 1B: Study Area Population Projections (High Growth)

Total Population	2011	2014	2016	2021	2026	2031
Zone 1 - Lutterworth Urban	9,353	9,955	10,356	11,358	12,361	13,363
Zone 2 - Lutterworth Rural	16,008	16,381	16,630	17,252	17,874	18,496
Zone 3 - Kilworth	10,976	11,145	11,259	11,581	11,845	12,147
Zone 4 - Market Harborough Rural West	24,956	25,587	26,009	27,087	28,127	29,192
Zone 5 - Market Harborough Urban	22,911	24,334	25,283	27,656	30,028	32,401
Zone 6 - Market Harborough Rural East	24,464	24,934	25,252	26,213	26,912	27,785
Total	**108,668**	**112,336**	**114,789**	**121,147**	**127,146**	**133,383**

Sources: *Experian 2011 Census and SNPP 2015 projections for Northamptonshire*
High growth projection based on 575 dpa plus flexible allowance.

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

	2014	2016	2021	2026	2031
Zone 1 - Lutterworth Urban	3,088	3,380	3,823	4,491	5,282
Zone 2 - Luuerworth Rural	3,535	3,868	4,376	5,141	6,046
Zone 3 - Kilworth	3,505	3,835	4,339	5,097	5,994
Zone 4 - Market Harborough Rural West	3,650	3,994	4,518	5,307	6,242
Zone 5 - Market Harborough Urban	3,056	3,345	3,784	4,445	5,227
Zone 6 - Market Harborough Rural East	3,201	3,503	3,963	4,655	5,475

Sources:
Experian 2014
Experian Forecast Growth Rates - October 2015

Data in 2014 prices
Excludes Special Forms of Trading

Table 3A: Total Comparison Goods Expenditure (£m) - Baseline

	2014	2016	2021	2026	2031
Zone 1 - Lutterworth Urban	30.65	34.83	43.04	54.84	69.53
Zone 2 - Luuerworth Rural	57.84	64.21	75.23	91.41	111.08
Zone 3 - Kilworth	39.05	43.16	50.19	60.27	72.66
Zone 4 - Market Harborough Rural West	93.28	103.68	121.95	148.52	181.03
Zone 5 - Market Harborough Urban	74.16	84.17	103.75	131.90	166.90
Zone 6 - Market Harborough Rural East	79.81	88.44	103.84	125.21	152.01
Total	**374.80**	**418.50**	**498.00**	**612.15**	**753.21**

Source: Tables 1A and 2

Table 3B: Total Comparison Goods Expenditure (£m) - High Growth

	2014	2016	2021	2026	2031
Zone 1 - Lutterworth Urban	30.74	35.00	43.42	55.51	70.58
Zone 2 - Luuerworth Rural	57.91	64.33	75.50	91.88	111.82
Zone 3 - Kilworth	39.06	43.18	50.25	60.37	72.81
Zone 4 - Market Harborough Rural West	93.39	103.87	122.38	149.28	182.21
Zone 5 - Market Harborough Urban	74.38	84.56	104.64	133.47	169.37
Zone 6 - Market Harborough Rural East	79.82	88.46	103.88	125.28	152.12
Total	**375.30**	**419.41**	**500.07**	**615.80**	**758.92**

Source: Tables 1B and 2

Table 4A: Base Year Comparison 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 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 4B: Future Year Comparison 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 town centre	4.6%	2.8%	16.3%	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%	8.7%	7.2%	0.1%	0.0%	0.0%	5.0%
Broughton Astley	0.0%	4.0%	0.6%	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%**	**16.0%**	**26.7%**	**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%	58.6%	30.0%	49.1%	27.7%	11.0%	n/a
Rugby	32.6%	10.7%	23.4%	0.5%	0.0%	0.1%	n/a
Other outside Harborough	9.9%	14.5%	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 with NLP adjustments

Table 5: Base Year Comparison Goods Expenditure Patterns (£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 2014	**30.65**	**57.84**	**39.05**	**93.28**	**74.16**	**79.81**		**374.80**
Market Harborough town centre	1.41	1.68	6.40	31.16	30.70	17.16	4.66	93.17
Market Harborough out of centre	0.03	0.06	0.59	2.89	4.23	1.92	0.51	10.22
Lutterworth	5.24	5.21	2.81	0.09	0.00	0.00	0.70	14.06
Broughton Astley	0.00	0.87	0.12	0.00	0.00	0.00	0.05	1.04
Fleckney	0.00	0.00	0.04	0.37	0.00	0.00	0.02	0.43
Great Glen	0.00	0.00	0.00	0.47	0.00	0.00	0.02	0.49
Kibworth	0.00	0.00	0.04	1.77	0.07	0.08	0.10	2.07
Other Harborough	0.15	0.23	0.35	0.19	0.00	0.16	0.06	1.14
Sub-Total	**6.84**	**8.04**	**10.35**	**36.94**	**35.00**	**19.31**	**6.13**	**122.61**
Corby	0.00	0.12	0.00	2.05	7.94	11.65	n/a	21.76
Kettering	0.06	0.00	0.12	1.87	5.78	28.09	n/a	35.92
Leicester/Wigston/Fosse Park	10.73	34.88	11.75	45.80	20.54	8.78	n/a	132.49
Rugby	9.99	6.30	9.18	0.47	0.00	0.08	n/a	26.02
Other outside Harborough	3.03	8.50	7.65	6.16	4.89	11.89	n/a	42.13
Grand Total	**30.65**	**57.84**	**39.05**	**93.28**	**74.16**	**79.81**	**6.13**	**380.93**

Source: Tables 3A 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	**34.83**	**64.21**	**43.16**	**103.68**	**84.17**	**88.44**		**418.50**
Market Harborough town centre	1.60	1.86	7.08	34.63	34.85	19.02	5.21	104.25
Market Harborough out of centre	0.03	0.06	0.65	3.21	4.80	2.12	0.57	11.45
Lutterworth	5.96	5.78	3.11	0.10	0.00	0.00	0.79	15.73
Broughton Astley	0.00	0.96	0.13	0.00	0.00	0.00	0.06	1.15
Fleckney	0.00	0.00	0.04	0.41	0.00	0.00	0.02	0.48
Great Glen	0.00	0.00	0.00	0.52	0.00	0.00	0.03	0.55
Kibworth	0.00	0.00	0.04	1.97	0.08	0.09	0.12	2.30
Other Harborough	0.17	0.26	0.39	0.21	0.00	0.18	0.06	1.27
Sub-Total	**7.77**	**8.93**	**11.44**	**41.06**	**39.73**	**21.40**	**6.86**	**137.18**
Corby	0.00	0.13	0.00	2.28	9.01	12.91	n/a	24.33
Kettering	0.07	0.00	0.13	2.07	6.57	31.13	n/a	39.97
Leicester/Wigston/Fosse Park	12.19	38.72	12.99	50.91	23.32	9.73	n/a	147.85
Rugby	11.35	7.00	10.14	0.52	0.00	0.09	n/a	29.10
Other outside Harborough	3.45	9.44	8.46	6.84	5.56	13.18	n/a	46.92
Grand Total	**34.83**	**64.21**	**43.16**	**103.68**	**84.17**	**88.44**	**6.86**	**425.36**

Source: Tables 3A 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	**43.04**	**75.23**	**50.19**	**121.95**	**103.75**	**103.84**		**498.00**
Market Harborough town centre	1.98	2.11	8.18	40.73	42.95	22.33	6.23	124.50
Market Harborough out of centre	0.04	0.08	0.75	3.78	5.91	2.49	0.69	13.74
Lutterworth	7.36	6.54	3.61	0.12	0.00	0.00	0.93	18.57
Broughton Astley	0.00	3.01	0.30	0.00	0.00	0.00	0.17	3.48
Fleckney	0.00	0.00	0.05	0.49	0.00	0.00	0.03	0.57
Great Glen	0.00	0.00	0.00	0.61	0.00	0.00	0.03	0.64
Kibworth	0.00	0.00	0.05	2.32	0.10	0.10	0.14	2.71
Other Harborough	0.22	0.30	0.45	0.24	0.00	0.21	0.07	1.49
Sub-Total	**9.60**	**12.04**	**13.40**	**48.29**	**48.97**	**25.13**	**8.29**	**165.71**
Corby	0.00	0.15	0.00	2.68	11.10	15.16	n/a	29.09
Kettering	0.09	0.00	0.15	2.44	8.09	36.55	n/a	47.32
Leicester/Wigston/Fosse Park	15.07	44.08	15.06	59.88	28.74	11.42	n/a	174.24
Rugby	14.03	8.05	11.75	0.61	0.00	0.10	n/a	34.54
Other outside Harborough	4.26	10.91	9.84	8.05	6.85	15.47	n/a	55.38
Grand Total	**43.04**	**75.23**	**50.19**	**121.95**	**103.75**	**103.84**	**8.29**	**506.29**

Source: Tables 3A 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	**54.84**	**91.41**	**60.27**	**148.52**	**131.90**	**125.21**		**612.15**
Market Harborough town centre	2.52	2.56	9.82	49.61	54.60	26.92	7.69	153.72
Market Harborough out of centre	0.05	0.09	0.90	4.60	7.52	3.00	0.85	17.03
Lutterworth	9.38	7.95	4.34	0.15	0.00	0.00	1.15	22.97
Broughton Astley	0.00	3.66	0.36	0.00	0.00	0.00	0.21	4.23
Fleckney	0.00	0.00	0.06	0.59	0.00	0.00	0.03	0.69
Great Glen	0.00	0.00	0.00	0.74	0.00	0.00	0.04	0.78
Kibworth	0.00	0.00	0.06	2.82	0.13	0.13	0.17	3.30
Other Harborough	0.27	0.37	0.54	0.30	0.00	0.25	0.09	1.82
Sub-Total	**12.23**	**14.63**	**16.09**	**58.82**	**62.25**	**30.30**	**10.23**	**204.55**
Corby	0.00	0.18	0.00	3.27	14.11	18.28	n/a	35.84
Kettering	0.11	0.00	0.18	2.97	10.29	44.07	n/a	57.62
Leicester/Wigston/Fosse Park	19.20	53.57	18.08	72.93	36.54	13.77	n/a	214.08
Rugby	17.88	9.78	14.10	0.74	0.00	0.13	n/a	42.63
Other outside Harborough	5.43	13.25	11.81	9.80	8.71	18.66	n/a	67.66
Grand Total	**54.84**	**91.41**	**60.27**	**148.52**	**131.90**	**125.21**	**10.23**	**622.38**

Source: Tables 3A 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	**69.53**	**111.08**	**72.66**	**181.03**	**166.90**	**152.01**		**753.21**
Market Harborough town centre	3.20	3.11	11.84	60.46	69.10	32.68	9.49	189.89
Market Harborough out of centre	0.07	0.11	1.09	5.61	9.51	3.65	1.05	21.10
Lutterworth	11.89	9.66	5.23	0.18	0.00	0.00	1.42	28.39
Broughton Astley	0.00	4.44	0.44	0.00	0.00	0.00	0.26	5.14
Fleckney	0.00	0.00	0.07	0.72	0.00	0.00	0.04	0.84
Great Glen	0.00	0.00	0.00	0.91	0.00	0.00	0.05	0.95
Kibworth	0.00	0.00	0.07	3.44	0.17	0.15	0.20	4.03
Other Harborough	0.35	0.44	0.65	0.36	0.00	0.30	0.11	2.22
Sub-Total	**15.51**	**17.77**	**19.40**	**71.69**	**78.78**	**36.79**	**12.63**	**252.56**
Corby	0.00	0.22	0.00	3.98	17.86	22.19	n/a	44.26
Kettering	0.14	0.00	0.22	3.62	13.02	53.51	n/a	70.50
Leicester/Wigston/Fosse Park	24.34	65.09	21.80	88.89	46.23	16.72	n/a	263.06
Rugby	22.67	11.89	17.00	0.91	0.00	0.15	n/a	52.61
Other outside Harborough	6.88	16.11	14.24	11.95	11.02	22.65	n/a	82.84
Grand Total	**69.53**	**111.08**	**72.66**	**181.03**	**166.90**	**152.01**	**12.63**	**765.83**

Source: Tables 3A and 4

Table 10A: Base Year Comparison Goods Floorspace

Town	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 10B: Comparison Goods Floorspace Commitments

	Sales Floorspace (sq.m net)	Comparsison Goods Floorspace (%)	Comparison Floorspace (sq.m net)	Turnover (£ per sq.m)	2014 Turnover (£m)	2021 Turnover (£m)
Aldi, Broughton Astley	1,254	20%	251	£6,980	£1.75	£2.01
B&M, Former Focus, Market Harborough	2,200	90%	1,980	£3,452	£6.83	£7.85
Bulky goods units, Welland Valley, Market Harborough	1,432	100%	1,432	£2,750	£3.94	£4.52
Sub-Total	**4,886**		**3,663**		**£12.52**	**£14.39**

Source: Harborough DC and Retail Rankings 2016

Table 11: Summary of Comparison Goods Expenditure Capacity 2013 to 2031 (Baseline)

Centre	2014	2016	2021	2026	2031
Available Expenditure in District (£m)					
Market Harborough	103.39	115.70	138.25	170.75	210.99
Lutterworth	14.06	15.73	18.57	22.97	28.39
Broughton Astley	1.04	1.15	3.48	4.23	5.14
Fleckney	0.43	0.48	0.57	0.69	0.84
Great Glen	0.49	0.55	0.64	0.78	0.95
Kibworth	2.07	2.30	2.71	3.30	4.03
Other Harborough	1.14	1.27	1.49	1.82	2.22
District Total	**122.61**	**137.18**	**165.71**	**204.55**	**252.56**
Benchmark Turnover of Existing Facilities (£m)					
Market Harborough *	103.39	107.56	131.13	144.78	159.85
Lutterworth	14.06	14.62	16.14	17.83	19.68
Broughton Astley *	1.04	1.08	3.20	3.53	3.90
Fleckney	0.43	0.45	0.50	0.55	0.61
Great Glen	0.49	0.51	0.56	0.62	0.69
Kibworth	2.07	2.15	2.38	2.62	2.90
Other Harborough	1.14	1.19	1.31	1.44	1.60
District Total	**122.61**	**127.57**	**155.23**	**171.38**	**189.22**
Surplus Expenditure (£m)					
Market Harborough	n/a	8.14	7.11	25.97	51.14
Lutterworth	n/a	1.11	2.42	5.14	8.70
Broughton Astley	n/a	0.07	0.28	0.69	1.23
Fleckney	n/a	0.03	0.07	0.14	0.23
Great Glen	n/a	0.03	0.08	0.16	0.27
Kibworth	n/a	0.15	0.33	0.68	1.14
Other Harborough	n/a	0.08	0.19	0.38	0.63
District Total	**n/a**	**9.61**	**10.48**	**33.16**	**63.34**

Source: Tables 5 to 9 ** comparison goods commitments added at 2021*

Table 12: Comparison Goods Floorspace Capacity (Baseline)

Town	2014	2016	2021	2026	2031
Turnover Density £ per Sq. M Net	5,000	5,202	5,743	6,341	7,001
Sales Floorspace Projections Sq. Net					
Market Harborough	n/a	1,564	1,238	4,095	7,304
Lutterworth	n/a	213	422	811	1,243
Broughton Astley	n/a	14	49	110	176
Fleckney	n/a	6	12	22	33
Great Glen	n/a	7	14	25	38
Kibworth	n/a	29	58	107	162
Other Harborough	n/a	16	32	59	90
District Total	**n/a**	**1,848**	**1,826**	**5,229**	**9,046**
Floorspace Projections Sq. Gross					
Market Harborough	n/a	2,085	1,651	5,461	9,739
Lutterworth	n/a	284	563	1,081	1,658
Broughton Astley	n/a	18	66	146	235
Fleckney	n/a	8	16	29	44
Great Glen	n/a	9	18	33	51
Kibworth	n/a	38	78	143	216
Other Harborough	n/a	21	43	79	120
District Total	**n/a**	**2,464**	**2,434**	**6,973**	**12,062**

Source: Table 11

Table 13: Summary of Comparison Goods Expenditure Capacity 2013 to 2031 (High Growth)

Centre	2014	2016	2021	2026	2031
Available Expenditure in District (£m)					
Market Harborough	103.55	115.99	138.90	171.91	212.80
Lutterworth	14.08	15.78	18.67	23.14	28.66
Broughton Astley	1.04	1.15	3.50	4.25	5.17
Fleckney	0.43	0.48	0.57	0.69	0.84
Great Glen	0.49	0.55	0.64	0.79	0.96
Kibworth	2.07	2.31	2.72	3.32	4.06
Other Harborough	1.14	1.27	1.50	1.83	2.24
District Total	**122.80**	**137.52**	**166.50**	**205.93**	**254.72**
Benchmark Turnover of Existing Facilities (£m)					
Market Harborough	103.55	107.73	131.32	144.98	160.07
Lutterworth	14.08	14.65	16.17	17.86	19.71
Broughton Astley	1.04	1.08	3.20	3.54	3.90
Fleckney	0.43	0.45	0.50	0.55	0.61
Great Glen	0.49	0.51	0.56	0.62	0.69
Kibworth	2.07	2.15	2.38	2.63	2.90
Other Harborough	1.14	1.19	1.31	1.45	1.60
District Total	**122.80**	**127.76**	**155.44**	**171.62**	**189.49**
Surplus Expenditure (£m)					
Market Harborough	n/a	8.26	7.58	26.92	52.72
Lutterworth	n/a	1.13	2.50	5.28	8.94
Broughton Astley	n/a	0.07	0.29	0.71	1.26
Fleckney	n/a	0.03	0.07	0.14	0.24
Great Glen	n/a	0.04	0.08	0.16	0.27
Kibworth	n/a	0.15	0.34	0.69	1.16
Other Harborough	n/a	0.08	0.19	0.38	0.64
District Total	**n/a**	**9.76**	**11.05**	**34.30**	**65.24**

Table 14: Comparison Goods Floorspace Capacity 2013 to 2031 (High Growth)

Town	2014	2016	2021	2026	2031
Turnover Density £ per Sq. M Net	5,000	5,306	5,858	6,468	7,141
Sales Floorspace Projections Sq. Net					
Market Harborough	n/a	1,557	1,295	4,162	7,383
Lutterworth	n/a	213	426	817	1,252
Broughton Astley	n/a	14	50	110	177
Fleckney	n/a	6	12	22	33
Great Glen	n/a	7	14	25	38
Kibworth	n/a	28	58	107	162
Other Harborough	n/a	16	32	59	90
District Total	**n/a**	**1,840**	**1,887**	**5,303**	**9,135**
Floorspace Projections Sq. Gross					
Market Harborough	n/a	2,076	1,726	5,550	9,844
Lutterworth	n/a	284	568	1,089	1,670
Broughton Astley	n/a	18	67	147	236
Fleckney	n/a	8	16	29	44
Great Glen	n/a	9	18	33	51
Kibworth	n/a	38	78	143	216
Other Harborough	n/a	21	43	79	119
District Total	**n/a**	**2,453**	**2,515**	**7,071**	**12,180**

Source: Table 11

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