

North West Leicestershire District Council UPDATE OF THE 2005 DISTRICT-WIDE RETAIL CAPACITY STUDY



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Final Report
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CONTENTS

1	PURPOSE OF THE UPDATE AND STRUCTURE OF THE REPORT	1
	Purpose of the Update	1
	Structure of the Report	1
2	UPDATE ON PLANNING POLICY ISSUES.....	3
3	PROGRESS BEING MADE IN THE SUB-REGION'S MAIN CENTRES.....	7
	Leicester	7
	Derby	7
	Nottingham	8
	Burton-upon-Trent	9
	Loughborough	9
	Other Locations Within The District.....	9
	Summary and Implications for North West Leicestershire.....	10
4	PERFORMANCE ANALYSIS OF COALVILLE AND ASHBY-DE-LA-ZOUCH TOWN CENTRES - UPDATE.....	11
	Introduction.....	11
	Updated Performance Analysis - Coalville And Ashby Town Centres.....	11
5	UPDATED QUANTITATIVE RETAIL CAPACITY ANALYSIS.....	21
	Introduction.....	21
	Summary of Methodology and Data Inputs.....	21
	Residual Expenditure - Comparison Sector	26
	Residual Expenditure - Convenience Sector	27
	Converting Residual Expenditure to Net Comparison Retail Floorspace Requirements	27
	Converting Residual Expenditure to Net Convenience Retail Floorspace Requirements	29
	Summary	29
6	ACCOMMODATING IDENTIFIED RETAIL NEEDS	31

1 PURPOSE OF THE UPDATE AND STRUCTURE OF THE REPORT

Purpose of the Update

- 1.1 Roger Tym & Partners (RTP) completed the North West Leicestershire Retail Capacity Study (NWLRCs) in June 2005. The report included forecasts of floorspace requirements for both the comparison and convenience retail sectors in the periods to 2008, 2011 and 2016, and contained advice on how best to accommodate the identified requirements.
- 1.2 Although the study is relatively recent, much of the technical work was undertaken earlier and various updated inputs are now available. For example, publications from MapInfo and Experian now advocate the use of different rates of expenditure growth and annual efficiency gains to those that we utilised in the NWLRCS. Intelligence on the use of other data inputs such as special forms of trading (including e-tail) has also improved even in the relatively short period since the technical forecasting work for the NWLRCS was undertaken.
- 1.3 Moreover, the emerging RSS now addresses a longer period, to 2026, and clearly there is merit, given the Council's current work on the emerging LDF, to produce new study forecast that correspond with this longer period. Indeed, the emerging replacement Regional Spatial Strategy for the East Midlands (draft RSS8) advocates an increased rate of development (of an 'appropriate' scale) to the sub-regional centres in the East Midlands, including Coalville, which represents a greater proposed level of development than seen in previous regional guidance.
- 1.4 In the context summarised above it is timely to update the quantitative food and non-food retail capacity analyses that we provided in the NWLRCS, using updated data inputs, and to revisit our assessment of potential opportunities for accommodating growth. As part of the update we have also undertaken a brief qualitative analysis of the performance of the main centres in the District, including reviewing the range of retailers which are currently trading in, or have retail requirements for, Coalville and Ashby. However it is worth stressing that there have been only limited developments in respect of the 'health check' criteria reviewed under the headings of 'accessibility', 'amenities' and 'action' since the assessment undertaken for the initial NWLRCS, as such changes tend to take place over a longer timescale. Our analysis in Section 4 is therefore confined to updating the performance analysis of Coalville and Ashby where new data has become available since completion of the NWLRCS.

Structure of the Report

- 1.5 The remainder of our report is structured as follows:
 - Section 2 provides an overview of the progress that is being made in the sub-region's main competing centres;
 - Section 3 sets out the findings of our updated assessment of the main town centres in the district - Coalville and Ashby-de-la-Zouch - in relation key 'performance indicators', taking into account our appreciation of the key issues that are currently affecting - or which could have a bearing on - the centres' performance as foci of retail services and leisure activity;
 - Section 4 contains our updated assessment of quantitative need for further comparison and convenience floorspace in the periods up to 2008, 2011, 2016, 2021 and 2026 under various scenarios taking into account claims on expenditure growth; and

- Section 5 sets out our updated assessment of options for meeting the identified need.

2 UPDATE ON PLANNING POLICY ISSUES

2.1 In this section we briefly consider the key developments in national, regional and local planning policy which have taken place since the submission of Roger Tym and Partners' 2005 Retail Capacity Study. We consider these key issues in turn below.

Planning for a Sustainable Future (Planning White Paper) (2007)

2.2 The Planning White Paper 'Planning for a Sustainable Future'¹ was published by the Department for Communities and Local Government in May 2007. The wide-ranging reforms are intended to speed up the planning system, both in terms of major infrastructure developments and minor alterations for householders and businesses, as well as confirming an emphasis on previously developed land as the focus for new development. The Paper is the Government's response to recommendations made in reviews of the systems by Kate Barker (Planning) and Sir Rod Eddington (transport), and is structured around four key pillars:

- A quicker system to decide major infrastructure projects, incorporating enhanced community engagement and an improved level of expertise;
- Simplification of the local planning system for householders, with emphasis on enabling improvements such as extensions to be carried out with greater ease, providing there is minimal impact on neighbours;
- Planning playing a bigger role in tackling climate change; and
- Ensuring the planning system continues to support vibrant town centres.

2.3 Chapter 7 of the White Paper deals with improving the effectiveness of town centre planning policy. The White Paper asserts that recent town centre policies have been a success, noting that levels of development in and around town centres have increased from 25% in 1994 to 41% in 2004.

2.4 Local authorities are seen as having an important role in continuing this trend by '*extending the boundaries*' of town centres '*where that makes sense*' and by promoting the growth and development of their town centres by '*facilitating a wide range of shopping, leisure and local services that enhance consumer choice*'².

2.5 In order to achieve this, the White Paper indicates that local authorities must have strategies which set out a '*clear and proactive vision for town centres, based on a sound understanding of both the need and demand for new facilities*'³. It continues: '*Where development outside the town centre would not impact detrimentally on the town centre, and it is otherwise acceptable in planning terms, both plans and planning decisions should reflect this*'.

2.6 Paragraph 7.52 of the White Paper refers to a '*sound understanding of both the **need** and **demand** for new facilities*'⁴ (our emphasis). This implies that any justification in quantitative terms for new retail floorspace will not be based solely on projections of available consumer expenditure, as at present. Whilst current (and prospective) town centre investment is stated as being supported as a priority (and therefore removing the need test altogether would be impractical), the Paper proposes to '*review the current approach in PPS6 to assessing the impact of proposals outside town centres. We will replace the need and impact test with a new test which has a strong focus on our town-centre first policy, and which promotes competition and improves consumer choice avoiding the unintended effects of the current need test*'.

¹ HM Government. May 2007. *Planning for a Sustainable Future: White Paper*. Norwich/London: TSO

² Barker, op cit, para 7.51

³ Ibid, para 7.52

⁴ Barker, op cit, para 7.52

- 2.7 Proposals for the development of new guidance in respect of the revised need test and competition policies will be consulted on in summer 2007, with any changes finalised by 2008

Draft East Midlands Regional Plan (RSS8) (2006)

- 2.8 The draft replacement East Midlands Regional Plan - which will cover the period to 2026 - was published in September 2006, and subsequently placed on consultation until December 2006. An independent Examination in Public is taking place in early summer 2007. Whilst not yet approved, the replacement RSS8 is, therefore, at an advanced stage of its preparation.
- 2.9 As with the approved RSS, the Draft RSS promotes ten 'Regional Core Objectives' and splits the region into 'sub-areas'. The principal centres of North West Leicestershire District, Coalville and Ashby de la Zouch, both fall within the Three Cities sub-area.
- 2.10 Policy 4, 'Concentrating Development in Urban Areas', outlines the hierarchy of urban areas where development should be concentrated. '*Significant levels of new development*' are directed towards the five PUAs (of which the Three Cities sub-area contains three - Derby, Leicester and Nottingham) and the 'growth towns' of Corby, Kettering and Wellingborough. '*Appropriate development of a lesser scale*' should be located in the defined Sub-Regional Centres, which include Coalville in the Three Cities sub-area (as per the adopted RSS), alongside Hinckley, Hucknall, Ilkeston, Loughborough, Market Harborough, Melton Mowbray and Swadlincote. The '*development needs of other settlements and rural areas*' should also be met.
- 2.11 The draft RSS states that '*the future vitality of many rural areas will depend upon the ability of urban and market town regeneration initiatives to deliver sustainable development and to make the links between the urban and rural communities*'. To this end, Policy 5: 'Regional Priorities for Development in Rural Areas', states that the vitality and viability of rural towns should be strengthened by '*providing for housing, employment and a range of services to serve a wider hinterland*'.
- 2.12 Policy 13 details 'Development in the Three Cities Sub-Area', and emphasises the focus on the economic development and regeneration of Derby, Leicester and Nottingham. Outside the PUAs, '*employment and housing development should be located within and adjoining settlements. Such development should be in scale with the size of those settlements*'. The 'close functional relationship' between Ashby, Burton upon Trent and Swadlincote is identified.
- 2.13 The Draft RSS presents a Sub-Regional Strategy (SRS) for the Three Cities Sub-Region. The vision for the Sub-area is as follows:

'The Three Cities Sub-area will be an area where the principles of sustainability are implemented through new development and regeneration. This will involve the significant strengthening of the complementary roles of the 3 Principal Urban Areas by providing new jobs, homes, services, community facilities and green and environmental infrastructure around them. The role of Sub-Regional Centres will be maintained through appropriate development, and the needs of other settlements requiring regeneration will be met in a sustainable way. Natural and cultural assets will be protected and enhanced'

- 2.14 Three Cities SRS Policy 4 details the annual provision which must be made for new housing in each of the Districts in the sub-region: North West Leicestershire District is allocated 480 dwellings per annum, of which 195 dwellings per annum should form a sustainable urban extension to Coalville.
- 2.15 The SRS states that the Sub-Regional Centres '*serve a wide catchment, and their vitality and viability should be promoted*'. However, the SRS also notes that '*some smaller centres are suffering decline*', and promotes the regeneration of such settlements through the use of design led initiatives and town centre strategies.

- 2.16 Draft RSS8 also repeats the conclusion in the approved RSS that there is *'no clear retail hierarchy in the East Midlands which could be used as a basis for regional policy'*. It is anticipated there will be potential for upwards of 440,000 sq.m (net) of additional comparison goods retail floorspace across the region by 2016. For the Three Cities sub-area, it is recommended that Nottingham, Derby and Leicester should be encouraged to develop their roles, but that there is also *'potential for complementary growth in the surrounding Sub-Regional Centres to retain a higher proportion of local income and reduce pressure on strategic transport infrastructure'*.
- 2.17 Policy 21, 'Regional Priorities for Town Centres and Retail Development', mirrors that of Policy 23 in the approved RSS, and states that *'Local Authorities, emda and Sub-Regional Strategic Partnerships should work together on a Sub-area basis to promote the vitality and viability of existing town centres, including those in rural towns. Where town centres are under performing, action should be taken to promote their investment through design led initiatives and the development and implementation of town centre strategies'*.

Leicester, Leicestershire and Rutland Structure Plan 1996-2016 (2005)

- 2.18 The adopted Structure Plan covering North West Leicestershire is the Leicester, Leicestershire and Rutland Structure Plan 1996-2016 (LLRSP), which was adopted in March 2005. The LLRSP covers the seven Districts which make up Leicestershire, as well as Leicester City and the county of Rutland.
- 2.19 Strategy Policy 2A details a sequential approach to development in Leicestershire, the first priority being *'previously developed land and buildings within or adjoining the central area of Leicester and the town centres of the Main Towns'*. Ashby and Coalville are both defined as 'Main Towns', along with a further eight locations⁵ elsewhere in the Plan area. The second priority for development is *'previously developed land and buildings elsewhere within the Leicester and Leicestershire Urban Area and the Main Towns'*, followed by 'Other land' within such areas.
- 2.20 Chapter 6 of the LLRSP details housing provision in Leicester and Leicestershire for the period to 2016, some 63,000 dwellings are allocated over the Plan area as a whole, with 31,500 of these within the Central Leicestershire Policy Area. North West Leicestershire District is allocated a total of 7,350 dwellings over the Plan period.
- 2.21 Central Areas and Shopping Policy 1 confirms that the role of Leicester's central area as a 'Regional Centre' will be sustained and increased, and that Leicester is the preferred location for 'major' new comparison retail development (i.e. projects of upwards of 1,000 sq.m). The central areas of Ashby and Coalville (and 12 other centres in Leicestershire and Rutland) will also be *'sustained and increased, and where appropriate expanded, through provision of retail, leisure, cultural, tourist and other central area facilities, office development and mixed use development'*.
- 2.22 Central Areas and Shopping Policy 2 states that existing shops, services and facilities will be protected in centres not listed in CASP1, *'where their demise would result in an identified need not being met locally or a deficiency arising'*.

North West Leicestershire District Council - Local Development Scheme (2007)

- 2.23 Under changes to the planning system prescribed by the Planning and Compulsory Purchase Act (2004), Local Plans will be replaced by a Local Development Framework, which will comprise a core series of Development Plan Documents (DPDs). The key DPD will be the Core Strategy, which will provide strategic guidance to development in the District; all other DPDs will need to be in compliance with Core

⁵ The other 'Main Towns' in the LLRSP area are Ashby, Coalville, Hinckley/Earl Shilton, Loughborough, Lutterworth, Market Harborough, Melton Mowbray, Shepshed, Oakham and Uppingham

Strategy policies. Reflecting the increased emphasis on community participation in planning, the LDF will also incorporate a Statement of Community Involvement.

- 2.24 The Local Development Scheme sets out the progress of the local planning authority in the development of its portfolio of LDF documents. Until the Core Strategy is adopted, a selection of 'saved' policies from the adopted Local Plan will form the statutory planning guidance for the District.
- 2.25 North West Leicestershire's most recent Local Development Scheme (published March 2007) notes that the District's LDF will comprise of:
- Core Strategy, with Development Control Policies appended;
 - Allocations DPD; and
 - Coalville Town Centre Area Action Plan
- 2.26 The Council is still at a relatively early stage of progression into the Local Development Framework. 'Preferred Options' stage consultation is due to take place on the Core Strategy and Coalville Area Action Plan towards the end of 2007. The Council will also consider the need to prepare a further four DPDs to guide development in the District. A series of five supporting Supplementary Planning Documents are also at varying stages of production. The Council's Statement of Community Involvement was adopted in October 2006.

BDP/Donaldsons - Coalville Town Centre Vision (2007)

- 2.27 The Coalville Town Centre Vision was published in January 2007, and produced by BDP, in partnership with Donaldsons. The Vision Report is intended to guide development in Coalville town centre for the next 10 to 20 years. It holds that, overall, *'the centre is reasonably healthy in its own terms, but is underperforming and fails to meet local needs, in particular in terms of the quality of food and other retailing and leisure offer'*. The dominant position of the Belvoir Shopping Centre in the town is noted, as is the 'generally poor' environment of the centre. Nevertheless it is held that *'there is capacity to increase the amount of comparison floorspace in the town and the quality of the convenience offer in the town centre, and to address the requirements for larger retail units'*.
- 2.28 The Vision outlined envisages Coalville as *'a distinctive, contemporary market town that provides a full range of retail, community and leisure services for residents and visitors and is becoming a sustainable exemplar of new development. Its convenient location and strong, positive image is recognised throughout the region and is a source of pride for the local community. An attractive and healthy place to live, work and relax'*.
- 2.29 Three 'core development projects' are identified:
- **Town Car Park Site:** potential for a retail-led development scheme to help develop a more integrated pedestrian network;
 - **Wolsey Road:** a number of large format retail units (5-800 sq.m) and a new 8,000 sq.m net foodstore set; and
 - **Whitwick Road:** potential for a mixed-use scheme to create a strong gateway to the town centre.

Improvements to the environment of Belvoir Road and Memorial Square are both flagged as being further key issues to be addressed.

3 PROGRESS BEING MADE IN THE SUB-REGION'S MAIN CENTRES

Leicester

- 3.1 Considerable regeneration is currently taking place within Leicester city centre, and retail development is amongst the largest and most significant projects underway in the city. The redevelopment and extension of the Shires Shopping Centre, to be renamed the Highcross Quarter, will provide a further 650,000 sq.ft of retail space within the city centre. The £250m redevelopment is being undertaken by developers Hammerson and Hermes and is presently scheduled for completion in autumn 2008. The extension will be arranged over a series of open streets and pedestrian squares, and will also include 143 apartments alongside a new restaurant quarter, a Cinema de Lux leisure facility, and a new multi-storey car park.
- 3.2 The scheme will be anchored by a flagship 204,000 sq.ft John Lewis store, designed by the acclaimed Foreign Office Architects. Other retailers committed to occupy units in the scheme include Next (48,000 sq.ft), New Look (23,200 sq.ft), and River Island (12,744 sq.ft), who will move from their existing smaller store in the Shires, as will clothing retailer Republic. The Highcross Quarter has also attracted a number of higher-end retailers including Zara, who will take a 22,000 sq.ft store in the scheme, and Reiss. H&M have also recently been confirmed to occupy space in the new development.
- 3.3 Upon completion, the Highcross Quarter is expected to help lift Leicester to 10th position in the Javelin's Venuescore Retail Rankings index. Leicester is placed 14th in the 2006 Venuescore listings.
- 3.4 Elsewhere in the city centre, Woolworths Plc vacated their 26,000 sq.ft store on Humberstone Gate, one of the largest units in the city centre, in early 2007, as we understand it following the company being made 'an offer it could not refuse'. No further plans for the future of the site, which forms part of the Haymarket Shopping Centre, have yet been released, although there is known to be concern at City Council level as to the future of this area on completion of the Highcross Quarter. The former Littlewoods department store, on the junction of Gallowtree Gate and Humberstone Gate, is also presently undergoing redevelopment to provide further new retail floorspace. Elsewhere in the Haymarket Centre the former Alders department store has been occupied by a new three-level Primark store.
- 3.5 Leicester City Council has recently commenced a widespread programme of public realm improvements in Leicester city centre, including the pedestrianisation of the busy High Street, in anticipation of the completion of the Highcross Quarter.
- 3.6 Away from the city centre, the Fosse Shopping Park, on the edge of Leicester adjacent to the M1, has witnessed a number of store redevelopments and new lettings, with River Island and Monsoon/Accessorize recently taking space in the Park. Thurmaston Shopping Centre, near Syston, has also seen a number of new lettings including outdoor goods retailer Blacks.

Derby

- 3.7 Derby's retail offer is due to be enhanced with the opening of Westfield's redevelopment and extension of the Eagle Shopping Centre in October 2007. The £340m redevelopment - to be renamed 'Westfield Derby' - will bring a total of 100 new retail units to the city centre. The scheme is to be anchored by Debenhams and Marks and Spencer, both of whom will relocate from existing premises in Derby's prime pitch. Other retailers confirmed for the scheme include Next (47,000 sq.ft), New Look (21,200 sq.ft), H&M (19,400 sq.ft), Dorothy Perkins (12,700 sq.ft), River Island (8,600 sq.ft),

- and Monsoon (8,800 sq.ft). A number of further retailers have recently been confirmed for the centre, including high-end retailers Bershka, Faith, G-Star, The Pier and Zara.
- 3.8 The redevelopment of the Eagle Centre will also include, as with Leicester, a Cinema de Lux, as well as an 800-seat food court and 3,700 car-parking spaces. The centre is expected to attract 22 million visitors a year upon opening.
- 3.9 Elsewhere in the city centre a number of other regeneration schemes are at varying stages of implementation. The long-delayed development of the Riverlights complex in close proximity to the Westfield Centre is expected to start later in 2007. The complex will include a replacement bus interchange, as well as retail, two hotels, and restaurants.
- 3.10 Regeneration agency Derby Cityscape has recently revealed plans for the development of offices, small retail units, and café/restaurant facilities on the site of a former supermarket in Bold Lane in the city centre. A planning application is expected to be submitted shortly, and the development is expected to act as a 'counter' to the larger stores trading in the Westfield Centre. Initial discussions are also underway for a £20m development adjacent to Pride Park, on the outskirts of the city, to provide new hotel, convenience store and restaurant/leisure facilities on land to the east of Pride Park Stadium.
- 3.11 The leisure and cultural offer in Derby is also witnessing substantial investment, with planning consent granted for a new hotel development to be occupied by Jury's Inn, and the new QUAD visual arts and media centre expected to open in the city centre in early 2008.

Nottingham

- 3.12 Nottingham is also currently experiencing widespread regeneration in its city centre, with several new retail led schemes expected to be developed over the coming years. The new retail offer in the city centre will be led by the Trinity Square development, adjacent to the Victoria Shopping Centre. The £100m mixed-use redevelopment of the former car park site at Trinity Square has been led by developers Helical Retail and Overton Developments, and will provide 190,000 sq.ft of retail accommodation, a 462-space car park, and 700 student dwellings. The scheme is expected to open later in 2007, and will be anchored by new TK Maxx (56,000 sq.ft) and Borders (27,000 sq.ft) stores.
- 3.13 Further new retail floorspace in the city centre will be provided at The Pod, Bildurn Properties' £25m scheme on the edge of the Lace Market in the city centre. The Pod will link the areas of Bridlesmith Gate and Hockley, and is expected to be completed towards the end of 2007 and will provide 100,000 sq.ft of floorspace aimed at high-end fashion retailers. No anchor retailers have yet been announced for The Pod, which will also contain an Ibis Hotel and a rooftop bar.
- 3.14 Westfield and Hermes have obtained planning consent for the redevelopment of the outmoded Broadmarsh Shopping Centre at the southern end of the city centre. The developers acquired a compulsory purchase order to enable development works to progress in May 2006. The £450m redevelopment of the existing centre will see Broadmarsh almost triple in size from its current floorspace of 450,000 sq.ft to 1.3 million sq.ft retail and leisure floorspace upon completion. No anchor retailers have yet been confirmed for the scheme. The redeveloped Broadmarsh will include two new department stores, upwards of 100 new retail units, a supermarket, food and drink outlets, a new transport interchange, and major new public space.
- 3.15 TK Maxx opened its largest UK city centre store (60,000 sq.ft) to date in the Broadmarsh Centre in October 2005, in the retail unit formerly occupied by Allders Department Store.

- 3.16 Capital Shopping Centres' added 32,000 sq.ft of additional retail space to the Victoria Centre in the city centre during 2006 as a result of the remodelling of the Victoria Centre's indoor market. The redevelopment provided three new units, with Topshop/Topman taking 25,000 sq.ft, Republic 8,500 sq.ft and Monsoon 6,250 sq.ft. The extension brings the total floorspace of the Victoria Centre to 981,000 sq.ft, split across 116 units. The Centre is anchored by John Lewis and House of Fraser.
- 3.17 Eastside and City Developments are to develop a 3 million sq.ft mixed-use scheme close to Nottingham city centre. Detailed planning permission has been sought by the developers for 'the Island' site; outline consent was granted in 2005 for 1.4m sq.ft of office space; 1.3m sq.ft of residential development; 43,000 sq.ft of leisure space and 126,000 sq.ft of retail floorspace.
- 3.18 Henry Boot developments has been granted planning permission for 'The Axis', a 270,00 sq.ft mixed use scheme on the site of a former Co-Op store in Nottingham city centre. ISIS is developing a £400m mixed-use development at Trent Basin; upon completion, the scheme will include 2,000 new dwellings, 25,000 sq.ft of offices and 40,000 sq.ft of retail space.

Burton-upon-Trent

- 3.19 Primark have opened a new larger store in Burton-upon-Trent's Coppers Square Shopping Centre; Primark's former premises have been occupied by fashion retailer New Look. Coopers Square presently totals over 34,000 sq.m of retail floorspace and attracts 12 million visitors a year.
- 3.20 F&C Property Asset Management paid ING Real Estate £10.55m in February 2007 for the leisure development at Middleway Retail Park, close to Burton-upon-Trent town centre. Tenants at the site include Cineworld, Frankie & Benny's, Chicago Rock Café and KFC. F&C already owns the retail premises adjacent to the leisure uses on the site.

Loughborough

- 3.21 The recently-developed 226,000 sq.ft Ruses Shopping Centre in Loughborough town centre has seen openings from Bathstore and Virgin Megastore, who join existing retailers including TK Maxx, Marks and Spencer Simply Food, JJB, Cargo Home Shop and Woolworths. Several vacant units remain in the development however.
- 3.22 New Look have acquired the former Littlewoods Department Store in the Carillon Court Shopping Centre, and opened for trading in 2006, relocating from their existing small store in Market Place.

Other Locations within the District

- 3.23 The only significant comparison retail development proposal within the District to be progressed since the 2005 study is the proposed retail warehouse development at Ashby-de-la-Zouch.
- 3.24 Following advice from Roger Tym & Partners, in 2005 the Council permitted one of the three proposals outstanding at the time - on the Calder Colours site at Nottingham Road - and refused two others, on Smisby Road and at Ashby Park. Subsequently the Ashby Park owners appealed against their refusal although in 2006, following a public inquiry, the appeal was dismissed.
- 3.25 However, we understand that the Calder Colours scheme has subsequently been affected by land assembly difficulties and an application for a smaller scheme has recently been submitted.

Summary and Implications for North West Leicestershire

- 3.26 The schemes highlighted above demonstrate that the competition posed to North West Leicestershire's town centres by the sub-region's principal centres is set to intensify. Major retail-led schemes in Derby and Nottingham are well underway and expected to be completed in 2007, whilst a third major scheme is under construction in Leicester and will open in 2008.
- 3.27 All these schemes have the potential to draw trade from within North West Leicestershire, which in turn is a factor that has implications for the scope for development within the District's centres in future. We provide more detail in this regard in subsequent sections of our report.

4 PERFORMANCE ANALYSIS OF COALVILLE AND ASHBY-DE-LA-ZOUCH TOWN CENTRES - UPDATE

Introduction

- 4.1 To inform the NWLRCS, we analysed the performance of the main centres in the District in relation to a range of 'important indicators' as specified in Section 4 of Planning Policy Statement 6 (PPS6). The assessments involved consultations with a range of stakeholders, on-foot surveys of each centre, photographic analysis, desk research in relation to the study centres, a review of recent town centre studies, and close liaison with officers at the District Council.
- 4.2 Below, we update the assessments for the District's two largest centres - Coalville and Ashby-de-la-Zouch - by examining their performance in relation to those indicators where new data have become available since we completed the NWLRCS, namely:
- retail rankings;
 - diversity of uses;
 - retailer demand;
 - retail yields;
 - prime Zone A shopping rents; and
 - vacancy rates.
- 4.3 We have not updated the analysis of indicators under the 'accessibility', 'amenities', or 'action' headings from the town centre 'healthchecks' in the NWLRCS, given the relatively short period of time that has elapsed since we undertook our original assessments: Roger Tym and Partners completed the initial study in June 2005, just over two years ago. In this context, two years is a relatively short timescale, and it is not considered that significant changes have taken place in respect of the criteria discussed in these sections of the original report. Therefore our assessment is confined to the criteria established above, for which updated data has become available since the submission of the NWLRCS in 2005.

Updated Performance Analysis - Coalville And Ashby Town Centres

Indicator 1: Retail Rankings

- 4.4 In previous retail statements, we have assessed the movement of centres in the national retail hierarchy using time-series data from Management Horizons Europe's (MHE) *UK Shopping Index*, although MHE does not intend to publish an update of its *Index 2003/04* until later in 2007. Nevertheless, Javelin Group's *Venuescore 2006* utilises a near-identical methodology for ranking the UK's retail centres. For instance, the Javelin index is calculated using a weighted count of multiple retailers which mirrors that used by MHE, comprising fashion retailers, non-fashion multiples and anchor stores⁶. The Javelin index also adopts the same eight grades of retail centre in the UK, from 'Major City', through to 'Local Centre'.

⁶ For instance, in both the MHE and Javelin indexes, Premier Department Stores (for example Selfridges and Harrods) score 15 points; Major Department Stores (Harvey Nichols, John Lewis) score 10; Premier Variety Stores (M&S) score 8; Clothing Destinations (Next, Gap) score 2; and Other Multiple Operators (Monsoon, Top Shop) score 1 point.

- 4.5 The only material difference between the Javelin and MHE indexes appears to be the fact that whereas MHE's latest index ranked the UK's top 1,672 retail centres, Javelin's index ranks the top 2,226 centres. However, most of the additional centres in the Javelin index feature in the eighth grade of retail venue, 'Local Centre', and therefore have no effect on the positioning of the majority of the centres.

Coalville

- 4.6 As shown in Table PA1, Coalville was ranked in equal 352nd position in the 2006 Venuescore Index, alongside other East Midlands centres of Retford, Spalding and Stamford. Coalville is classed as a fifth-tier 'Major District' centre by both Venuescore and MHE. The position of 352nd represents a decline however from the town's ranking of 329th in the MHE 2003/04 Index. In each of the preceding Indexes, Coalville gained positions in the Index, improving by a total of 65 places between 1995/96 and 2003/04. However, recent progress seems to have stalled and if the town is to fulfil its designated role in future we would anticipate that further progress in these rankings will be required.

Ashby de la Zouch

- 4.7 Ashby is classed as an eighth-tier 'Local Centre' and is ranked 1,076th by the Venuescore Index. This represents a decline of 164 places from the position of 912th in the 2003/04 MHE Index, and confirms the continued downward momentum the town has experienced in the retail rankings from a peak of 614th in the 1998/99 MHE Index. As we noted in our previous study, the slippage can be partly explained by the inclusion of 73 retail parks and 9 shopping malls in the 2003/04 MHE Index which were not previously incorporated; furthermore, the inclusion of a large number of 'local' centres in the more recent Venuescore Index should also be noted⁷. Nevertheless, taking these into account, the position of Ashby in the Index has still severely declined over the course of the past decade, and the town's current placing of 1,076th marks its lowest position to date.
- 4.8 Clearly this decline is of some concern. However, Ashby scores well in terms of other indicators and provided that a reasonable overall choice of retailing can be provided through independent as well as multiple retailers then the town's overall ability to perform its identified role and function will not be necessarily be compromised.

Centre	Javelin Venuescore Ranking 2006				Management Horizons Europe Centre Rankings 1995-2004				
	Javelin Location Grade	Market Position Index (Avg=100)	Market Position Classif'n	Javelin Centre Ranking 2006	MHE Location Grade	MHE 2003/04 Rank	MHE 2000/01 Rank	MHE 1998/99 Rank	MHE 1995/96 Rank
COALVILLE	Major District	83	Down	352	Major District	329	331	361	394
ASHBY DE LA ZOUCH	Local	1,076	-	1,076	Local	912	602	614	620

Table PA1: Positioning of Coalville and Ashby in Javelin Venuescore and MHE Retail Rankings. Sources: Javelin Venuescore (2006 rankings); Management Horizons Europe (1995/96-2003/04 rankings)

Indicator 2: Diversity of Uses

- 4.9 Experian Goad's latest survey of Coalville and Ashby town centres were conducted in September 2006 and August 2005 respectively, and hence represents a reasonably up-to-date and accurate indication of the retailers present in the city centre⁸. The survey compares the representation of convenience, comparison and service uses,

⁷ The highest ranking 'Local' Centre in the Venuescore Index is 988th - suggesting that at minimum Ashby will have lost a minimum of a further 76 places.

⁸ We are of the opinion that the boundaries are likely to remain unchanged from the Goad survey data which was used to inform the 2005 NWLRCS although regrettably it is not possible to confirm this.

and their respective sub-sectors, in order to identify any areas where there is a notable shortfall, or indeed over-representation. We review the key points below.

Coalville

- 4.10 Coalville contains a total of 17 convenience outlets, accounting for 9.2 per cent of all town centre units, fractionally above the UK average of 9.1 per cent. A noticeable shortfall in the *'grocery and frozen foods'* sub-sector can be observed however - there are just two such units identified in the town centre - Farmfoods and Somerfield. Furthermore, the Somerfield store (which the company converted from a Kwik Save store) in Ashby Road has since closed. There is therefore a clear deficiency in this sub-sector in Coalville town centre; other convenience sub-sectors fall broadly in line with UK averages however.
- 4.11 The representation of comparison goods stores in Coalville overall falls slightly short of the UK average, accounting for 78 units - equivalent to 42.4 per cent of total units, 3.5 per cent below the UK average of 45.9 per cent. The proportion of comparison goods outlets in the town centre has decreased from the previous Goad survey of March 2003, when comparison outlets accounted for 46.0 per cent of total units in the centre.
- 4.12 Eight of the 16 comparison sub-sectors have above-average representation, and eight show under-representation. The *'electrical, home entertainment, telephones and video'* and *'cars, motorcycles and motor accessories'* sub-sectors post above-average representation of 1.3 and 1.4 per cent to the UK average respectively. Conversely, the *'furniture, carpets and textiles'* sub-category accounts for just 2.2 per cent of units, 1.9 per cent below the UK average.
- 4.13 The performance of the clothing and footwear sub-categories, which can be regarded as especially important in determining a centre's attractiveness to shoppers, gives cause for concern however. Three of the four clothing sub-categories are under-represented, and the key *'women's, girls, children's clothing'* sub-category is represented by just 5 units, 2.7 per cent of total units, and a significant 2.8 per cent short of the UK average. The *'mixed and general clothing'* sub-category also posts a shortfall of 1.7 per cent to the UK average. We consider the nature of the specific retailers present below under the heading *'Presence of National Multiples and High Profile Retailers'*.
- 4.14 The proportion of service outlets in Coalville town centre is, at 36.4 per cent, some way above the UK average of 32.9 per cent. Of note in particular is the *'hairdressers, beauty parlours and health centres'* sub-sector, which accounts for 10.9 per cent (20 units) of the units in the town centre, 3.7 per cent above the UK average. *'Banks and financial services'* are over-represented by 2.1 per cent against the UK average of 4.5 per cent. Conversely, the *'restaurants, cafes, coffee bars, fast food and take-aways'* sub-sector accounts for just 11.4 per cent, 2.7 per cent below the UK average.
- 4.15 The proportion of vacant units in the town centre, at 11.4 per cent, is slightly above the UK average of 10.8 per cent. We return to discuss vacant units further below under the heading *'Proportion of Vacant Street Level Property'*.

Ashby de la Zouch

- 4.16 Ashby contains 14 convenience goods outlets, accounting for 8.8 per cent of units in the town centre, and hence, like Coalville, is slightly under-represented compared to the UK average. The majority of the six convenience sub-sectors have representations broadly in line with UK averages, although *'grocery and frozen foods'* (3 units) and *'confectioners, tobacconists, newsagents'* (2 units) are under-represented by 0.9 and 1.0 per cent respectively.
- 4.17 The proportion of comparison goods retailers is surprisingly high, with the 85 comparison goods stores accounting for 53.5 per cent of all units in the centre, a noteworthy 7.6 per cent above the UK average of 45.9 per cent. The previous Goad survey for Ashby showed that there were 79 comparison units, 50.3 per cent of the

total. Encouragingly therefore the comparison goods offer in Ashby is expanding, which can be seen as a positive indication on the vitality and viability of the town centre.

- 4.18 10 of the 16 comparison goods sub-sectors post representation above their respective UK averages, most noticeably *'electrical, home entertainment, telephones and video'* (14 outlets) and *'booksellers, arts/crafts, stationers/copy bureaux'* (10 outlets), which are over-represented by 2.9 and 2.0 per cent of their corresponding UK average. The sub-sector with the greatest shortfall to the UK average is the *'mixed and general clothing'* sub-sector, which is represented by just 3 units in the town centre, 1.5 per cent below the UK average. More positively, the other clothing sub-sectors perform reasonably well; there are 11 *'women's, girls, children's clothing'* units in the town centre, 1.4 per cent up on the sub-sector's UK average.
- 4.19 Service sector uses account for 51 units in the town centre; at 32.1 per cent, this falls slightly short of the UK average of 32.9 per cent, although we do not consider this to be cause for concern. The only sub-sector which shows a noticeable shortfall is *'restaurants, cafes, coffee bars, fast food and take-aways'*, which accounts for 12.6 per cent of units compared to the UK average of 14.1 per cent.
- 4.20 Significantly, Ashby town centre has a low vacancy rate of just 7 units, 4.4 per cent of the total units in the town centre, and 6.4 per cent below the UK average. This is a further positive indication of the current 'health' of the town centre.

Indicator 3: Presence of National Multiples and High Profile Retailers

Coalville

- 4.21 As noted above, Coalville's convenience offer is comparable to the UK average. However, the presence of national convenience multiples is limited, particularly with regards to foodstore chains, with the offer presently limited to Farmfoods. Supermarket provision in Coalville as a whole is relatively limited, with major foodstore provision restricted to the Morrisons store on Whitwick Road and an Aldi store on Thornborough Road. The town centre offers a number of specialist convenience retailers including bakery stores Bakers Oven, Birds and Greggs, and confectionary retailer Thorntons.
- 4.22 Representation from national comparison multiples is concentrated predominantly in the Belvoir Shopping Centre, with retailers present including Argos, Boots the Chemist, Currys.Digital, H Samuel and Wilkinson. The town can be considered to have solid representation from national fashion multiples; however the offer is very much restricted to the lower end of the retail spectrum. Fashion retailers present in the centre include Burton, Dorothy Perkins, New Look and Select, as well as Clarks, Priceless and Shoe Zone shoe stores. Coalville therefore lacks the presence of middle to upper-middle classified retailers such as Accessorize, Next, River Island, Topshop and Wallis.
- 4.23 Coalville town centre contains representation from a number of national banks and building society chains, and a small number of travel agents, including Co-Op Travel and Thomson. In respect of service uses, the town can be considered to be well provided.

Ashby de la Zouch

- 4.24 Given the relatively small nature of the town, there is limited representation in Ashby from national convenience and comparison multiples, although as discussed below (Indicator 4), there are encouraging signs of increasing levels of interest from national multiples operators.
- 4.25 The national convenience multiple offer is restricted to Somerfield, who operate the town centre's sole foodstore from a 19,800 sq.ft store on Derby Road. Ashby also has a limited number of more specialist convenience multiples, restricted to Thorntons, and bakery chains Hampshires and Birds.

4.26 National comparison multiples are similarly limited: Boots the Chemist, Superdrug, WH Smith and Woolworths are all present in the town; alongside fashion multiples Dorothy Perkins, New Look and Peacocks. As with Coalville therefore the fashion multiples present are concentrated towards the lower end of the retail spectrum.

4.27 Ashby can be considered to have solid representation from national service multiples such as banks, building societies and travel agents.

Indicator 4: Operator Demand

4.28 The commercial organisation, FOCUS, collects data on documented retailer requirements, and publishes the data twice-yearly. FOCUS also produces Town Reports for main centres, which include time-series data on the number of retail requirements.

4.29 It is worth emphasising from the outset that the level of demand for any centre is always influenced by whether any new development is proposed; hence if a major new development scheme was to emerge, the number of requirements would be expected to show a noticeable increase.

Analysis of published requirements by number

4.30 Figure PA2 shows the number of published retailer requirements for Coalville and Ashby between April 1997 and April 2007, as identified in FOCUS's most recent Town Reports for Coalville and Ashby (April 2007). The levels of operator demand for both Ashby and Coalville have shown a degree of fluctuation over the past decade; Ashby's can be observed to be on a general upward trend, whilst the number of requirements for Coalville has also improved recently. Interestingly, as Figure PA2 shows, the numbers of requirements for the smaller centre of Ashby have been consistently greater than those of Coalville since October 2003.

4.31 The number of retailer requirements for Ashby presently stands at 15 (April 2007), with the number of requirements for Coalville is 11, despite its larger size. Encouragingly, this equals a historic high for both centres, with Ashby's tally matching the 15 requirements listed for Ashby between October 2004 and April 2005, and Coalville having remained static at a peak of 11 requirements since April 2006.

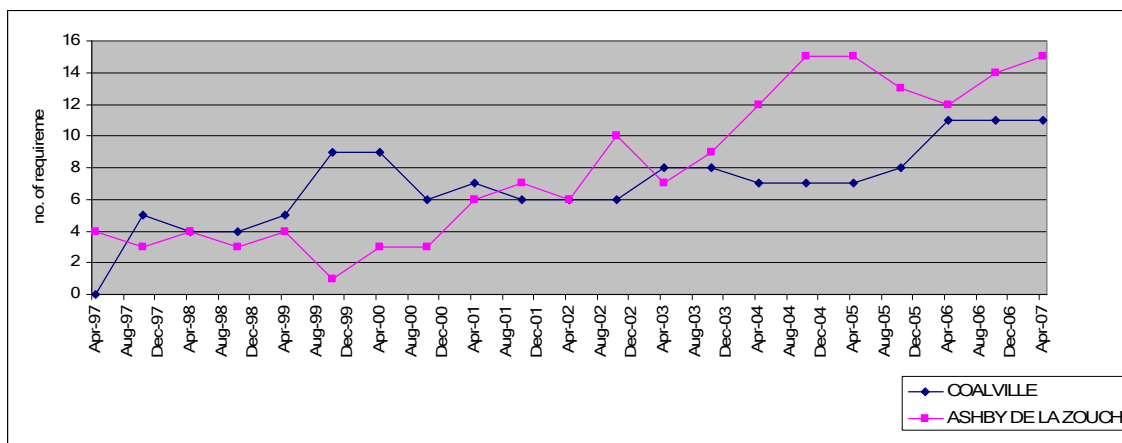


Figure PA2: Published retailer requirements for Coalville and Ashby, 1997-2007 (Source: FOCUS)

Analysis of published requirements by type

Coalville

4.32 The FOCUS database also contains more detailed information with regards to the 11 operators who currently have an identified requirement for Coalville, although one of these requirements (Pets at Home) is a duplicate entry. The majority of the requirements are for town centre premises, with only Pets at Home and Wynnstay Group solely looking for out-of-centre locations.

- 4.33 Of the 10 requirements, six requirements are from comparison goods multiples. These comprise of lower-end clothing chains including Ethel Austin and Peacocks; chemist store Superdrug; discount stationers The Works, Wynnstay Group (who specialise in the retail of gardening, agricultural and pet goods) and pet goods retailer Pets at Home. The remaining requirements include travel agents group First Choice. There are currently no requirements for Coalville from national convenience multiples, nor any middle to higher-end fashion store chains therefore.

Ashby de la Zouch

- 4.34 FOCUS lists details of 13 retailers with a current interest in establishing a presence in Ashby. Of these 13, 7 requirements are from comparison goods operators; including two from national fashion multiples - one low-end retailer (Ethel Austin) and, promisingly, the upmarket ladies wear retailer Country Casuals. Other comparison goods requirements are B&Q, Card Warehouse, Pets at Home, Savers Health and Beauty and Specsavers Opticians.
- 4.35 Aside from comparison retailers, other requirements for Ashby include pub chain JD Wetherspoon, who confirmed interest in the town when consulted for our previous study for the District; coffee chain Starbucks, take-away chains Subway and Wrights, discount foodstore operators Netto, and dry cleaning chain Johnsons.
- 4.36 As with Coalville, the majority of the identified retailers are seeking space in Ashby town centre, with only B&Q, Netto and Pets at Home seeking space solely in areas outside the town centre.

Indicator 5: The Retail Property Offer

Coalville

- 4.37 Analysis of the most recent FOCUS listing (April 2007) shows that the mean sales area for the 10 retail and food & drink operators currently seeking space in Coalville town centre is around 4,420 sq.ft (410 sq.m). The mean sales area solely for the comparison goods operators is slightly higher, at 5,430 sq.ft (504 sq.m), which can largely be explained by the large requirements of Peacocks (10,000 sq.ft mean) and Pets at Home (8,000 sq.ft mean). Indeed, removing these two requirements has the effect of reducing the mean sales area requirement to around 3,100 sq.ft (290 sq.m).
- 4.38 Our analysis of Experian's Goad data for Coalville (September 2006) identifies that the 21 vacant units in the defined town centre⁹ have an 'average' gross floorspace of 1,123 sq.ft (104 sq.m), which translates to an 'average' net sales area of approximately 787 sq.ft (73 sq.m)¹⁰. Even taking into account deductions for retailers who traditionally locate in out-of-centre locations, the 'average' net vacant unit size is almost a quarter of the average requirement of 3,100 sq.ft. There is therefore a lack of suitable premises for the needs of many modern retailers in Coalville town centre. The largest vacant unit in the town centre is a 2,700 sq.ft gross unit on Margaret Street; 17 of the 21 vacant units are under 2,000 sq.ft gross.

Ashby de la Zouch

- 4.39 Analysis of the FOCUS listing for Ashby indicates that the mean sales area for the 13 retail and food & drink operators who are presently seeking space in the town is considerably greater than that of Coalville, at 6,280 sq.ft (583 sq.m). The mean sales area requirement for comparison goods operators is highly similar, at 6,320 sq.ft (587 sq.m). The particularly high mean requirement is hugely swayed however by the substantial requirement of DIY goods retailer B&Q, who require premises in the town of between 40,000 and 55,000 sq.ft. Removing this requirement brings the mean requirement down significantly to a more realistic 2,450 sq.ft (230 sq.m).

⁹ GOAD definition

¹⁰ The average sales floorspace is derived by applying a gross to net ratio of 70 per cent.

- 4.40 The most recent Goad survey for the town centre (August 2005) found that there were 7 vacant premises in Ashby town centre, with an 'average' gross floorspace of approximately 1,630 sq.ft (150 sq.m), equivalent to an 'average' net floorspace of 1,140 sq.ft (105 sq.m). The 'average' floorspace of vacant units in the town centre is therefore just over half that of the mean requirement of 2,450 sq.ft as identified above.
- 4.41 The town centre has two sizeable vacant units which could potentially be suited to the needs of modern retailers who require larger footprint stores however, a 3,700 sq.ft unit on Kilwardby Street, and a 3,500 sq.ft unit on Market Street, although both units are in slightly peripheral areas.

Indicator 6: Retail Yields

- 4.42 Table PA3 below shows the prime retail yields in Coalville and Ashby de la Zouch since April 2000. Yield is an efficient measure of the confidence of investors in the long term profitability of the town centre for retail (and other commercial) developments; hence the lower the yield, the greater the level of investment confidence.
- 4.43 As can be seen, prime retail yields in Coalville and Ashby have followed an identical trajectory until very recently. Positively, both centres have seen significant decreases in their prime yield, suggesting their attractiveness as investment opportunities are increasing. Both Coalville and Ashby had high prime yields of 9 per cent between April and October 2005, which subsequently improved to 8.5 per cent, a level at which they remained static until January 2006. Since this point both centres have seen further improvement: prime yields are presently 8 per cent in Coalville, whilst Ashby has seen an impressive 1 percentage point improvement in its prime yield rate over the space of a year to 7.5 per cent.

	Apr 00	Oct 00	Apr 01	Oct 01	Apr 02	Oct 02	Apr 03	Jan 04	Jul 04	Jan 05	Jul 05	Jan 06	Jul 06	Jan 07
COALVILLE	9	9	8.5	8.5	8.5	8.5	8.5	8.5	8.5	8.5	8.5	8.5	8	8
ASHBY DE LA ZOUCH	9	9	8.5	8.5	8.5	8.5	8.5	8.5	8.5	8.5	8.5	8.5	7.5	7.5

Table PA3: Prime retail yields for Coalville and Ashby town centres, 2000-2007 (Source: Valuation Office Property Market Report, January 2007)

Indicator 7: Changes in Prime Zone A Shopping Rents

- 4.44 Regrettably there is little information available detailing time-series levels of prime Zone A retail rent in either Coalville or Ashby town centres. Prime Zone A retail rents are listed by FOCUS, with information supplied by Colliers CRE¹¹. For Coalville, Prime Zone A rental rates are only available from 2003 onwards: prime rents remained static at £45.00 per sq.ft between 2003 and 2005, but encouragingly rose to £50.00 per sq.ft in 2006.
- 4.45 Prime rental data is only available for Ashby for 2006, with FOCUS identifying a prime rent of £40.00 per sq.ft being achieved in the town centre, representing an increase of £5.00 per sq.ft from the £35.00 per sq.ft which our consultation with local agents cited in the 2005 study.

Indicator 8: Proportion of Vacant Street Level Property

- 4.46 RTP's 2005 study identified that Coalville town centre contained 18 vacant units, equating to 9.7 per cent of all units in the centre. Experian Goad have subsequently carried out a further survey of Coalville (September 2006), which found the vacancy rate to have increased slightly to a total of 21 units, equivalent to 11.4 per cent of units. Coalville presently has a vacancy rate which is 0.6 per cent above the UK average of

¹¹ The Valuation Office also offers statistical information on rental values in prime retail, secondary retail and retail warehouse units, however such information is not available for Coalville or Ashby.

10.8 per cent. This represents something of a cause for concern therefore, and is an issue which should continue to be monitored.

- 4.47 Closer analysis of the GOAD data indicates however that the vacancy rate for the town centre is significantly influenced by the higher vacancy rate apparent in the Belvoir Shopping Centre compared to the rest of the town centre. Table PA4 demonstrates that the Belvoir Shopping Centre had (at the time of the GOAD survey) a vacancy rate of 15.09 per cent - approximately 4.5 per cent above the UK average, with 8 of the 53 units in the centre vacant. However there were just 13 vacant units elsewhere in Coalville town centre, equivalent to 9.92 per cent of the retail units in the remainder of the centre.
- 4.48 The vacancy rate in the remainder of Coalville town centre is therefore approximately 0.9 per cent below the UK average, whilst the vacancy rate within the Belvoir Shopping Centre is considerably higher than the UK average, and, as over a third of all the vacant units within Coalville are located in the Centre, this serves to significantly increase the town-wide vacancy rate to 11.41 per cent.
- 4.49 Aside from the Belvoir Shopping Centre, concentrations of vacant units were apparent in Belvoir Road and Hotel Street, each of which had four vacant units at the time of the GOAD survey.

	Number of units ¹²	Vacant	% vacant
Belvoir Shopping Centre	53	8	15.09
Remainder of Coalville town centre*	131	13	9.92
Total	184	21	11.41

Table PA4: Comparison of vacant units in the Belvoir Shopping Centre, Coalville, and remainder of Coalville Town Centre, at September 2006 (Source: Experian Goad). (*Goad definition of town centre).

- 4.50 The 2005 RTP study noted the vacancy rate in Ashby to be 6.4 per cent - 10 vacant units. As noted above, the more recent Experian Goad survey (August 2005) found the vacancy rate to have decreased further to 4.4 per cent (7 units). The number of vacant units in Ashby is therefore encouragingly low at present, suggesting a strong level of vitality and viability in the town centre, although the lack of vacant units can also serve to limit the opportunities available for retailers wishing to establish a presence in Ashby town centre in the absence of development of new retail floorspace.

Summary of the performance of Coalville and Ashby town centres

- 4.51 Our updated assessment of the performance of Coalville and Ashby town centres has highlighted a number of key conclusions:
- Coalville's advancement in the retail rankings which was observed between 1995/96 and 2003/04 has halted, and the town lost position in the retail rankings in 2006. Ashby has also declined in its position in the retail rankings, but is well provided for in terms of independent retailers;
 - Coalville has a level of convenience goods provision which is similar to the UK average, although the town suffers from a lack of grocery and frozen foods retailers. Comparison goods representation is also equivalent to the UK average although the town is noticeably under-represented in the key clothing sub-categories. Ashby has a slightly below-average representation from convenience goods retailers but, positively, there is evidence of an expanding comparison goods offer;
 - There is limited representation from national convenience multiples in both Coalville and Ashby. Coalville has a solid representation from national comparison

¹² Number of units with GOAD-defined classification - a small number of uses are exempt from classification

multiples. In both centres the national fashion retailer offer is restricted to lower-end stores such as New Look;

- Ashby currently has 15 national retailers with an identified interest in the town, and Coalville has 10. Both figures are historic highs for the respective towns. Requirements for Coalville include Peacocks, Superdrug and The Works Publishers Outlet, whilst requirements for Ashby are notably diverse, and include upmarket ladies wear retailer Country Casuals, as well as B&Q and Starbucks Coffee;
- The 'average' floorspace requirements for retailers looking to establish a presence in either Coalville or Ashby are currently significantly higher than the 'average' floorspace of vacant units in the respective town centres;
- Prime retail yields in Coalville and Ashby have until recently followed an identical trajectory and both towns have seen their prime retail yield improve since the start of the decade. Ashby currently has a prime retail yield of 7.5 per cent, with Coalville's prime yield currently 8.0 per cent;
- Limited information is available on prime Zone A rental rates in the two centres, although prime rents of £50.00 per sq.ft were achieved in Coalville in 2006, and £40.00 per sq.ft in Ashby; and
- Coalville town centre has a vacancy rate above the UK average, at 11.4 per cent of all units at the time of the last GOAD survey, although it should be noted that over a third of all vacant units in the town are within the Belvoir Shopping Centre, and the vacancy rate for the remainder of the town centre is below average. Ashby has an extremely low vacancy rate of 4.4 per cent, which, whilst encouraging, may limit further opportunities for new retailers to establish a presence in the town.

5 UPDATED QUANTITATIVE RETAIL CAPACITY ANALYSIS

Introduction

- 5.1 In this section we provide details of the methodology employed to update the quantitative retail capacity analysis that we undertook for the North West Leicestershire Retail Capacity Study (NWLRCs) in 2005. We then set out the updated comparison and convenience retail floorspace requirements that we forecast will arise in the period to 2026 across the entire North West Leicestershire Overall Catchment Area (OCA), and provide our advice regarding how much of the overall floorspace requirements should be directed to the centres of Coalville and Ashby de la Zouch. For the purposes of this update, and the NWLRCS, the OCA was taken to be the boundary of North West Leicestershire District (Figure 4.1).

Summary of Methodology and Data Inputs

- 5.2 The main steps in the assessment of the quantitative capacity for further comparison and convenience goods retail floorspace follow essentially the same methodology as employed in the NWLRCS of 2005. However, Experian and MapInfo have both released updated publications and datasets since we completed the NWLRCS. Intelligence on the use of other data inputs such as special forms of trading (SFT) has also improved since we undertook the previous study. In addition, more up-to-date population forecasts and expenditure data are now available.
- 5.3 The methodology is summarised below, together with information on the various data inputs that we have used for our update of quantitative retail capacity.
- i) first, we use the household survey data to establish the comparison and convenience goods spending patterns of residents within North West Leicestershire's overall catchment area (OCA) and assess the overall retention of expenditure by centres and stores located within the OCA. As with the previous study, the OCA is defined as the administrative boundary of North West Leicestershire District;
 - ii) second, we forecast the growth in comparison and convenience goods expenditure of the OCA's residents from 2004¹³ to 2008; from 2008 to 2011; and 2011 to 2016 (the same forecasting periods as employed in the previous study). We have also projected the forecasts forward to two further intervals - 2016 to 2021 and 2021 to 2026, taking account of population change and the real growth, over and above inflation, in per capita spending levels;
 - iii) we then make a forecast of the future retention rate - the proportion of the expenditure of the OCA residents which is spent in centres and stores located within the OCA;
 - iv) we make allowances for 'claims' on retail expenditure growth, which are:
 - o the growth in 'turnover efficiency' (turnover per sq.m sales area) for existing retailers;
 - o our best estimate of the likely growth over time in SFT, of which e-tail will be of most significance; and
 - o take account of existing commitments for retail development (although these are reasonably limited); and then

¹³ Updated per capita retail expenditure data for the study area have been provided by MapInfo, with bespoke data provided for each of the 7 survey zones. The new expenditure data are in 2004 prices, whereas all monetary values for the original study were expressed in 2001 prices.

v) finally, we convert the resulting residual expenditure (that is, growth in retained expenditure, less the three 'claims' on it) to a potential sales floorspace 'capacity'.

5.4 In relation to point i) above, the household survey that was undertaken to inform the NWLRCS remains the most detailed and up-to-date examination of shopping patterns across the entire OCA. In the absence of any major developments since the 2005 study within or close to but outside of the North West Leicestershire OCA with the potential to materially alter shopping patterns, the market shares currently achieved by the town centres and stores in Coalville and Ashby are unlikely, we consider, to be materially different to those established by the 2005 survey.

5.5 Below, we comment on each of the various data inputs referred to above.

Population and Study Area

5.6 The OCA, and its 7 constituent expenditure zones, is shown below as Figure 4.1.

Figure 4.1 Overall Catchment Area - North West Leicestershire District



5.7 For this update to the 2005 study we have obtained more up-to-date population and expenditure information. Population projections are derived from Leicestershire County Council's 'Leicestershire Ward Population and Household Estimates 2004'. Given that, as can be observed above, each of the seven zones which make up the OCA comprise of amalgamations of wards, the ward population data has been similarly amalgamated to provide 2004 ward-based populations.

5.8 The 2004-based population has been subsequently projected forward to 2026 using growth rates derived from Leicestershire County Council's District-wide population forecasts. Applying the growth rate to the 2004 ward-based population gives an

estimated OCA population of 88,260 in the 'base year' of 2004, increasing to 90,368 in 2008; to 91,949 in 2011; 94,827 in 2016; 97,492 in 2021 and finally to 100,378 in 2026. The spreadsheets in Appendices 1 and 2 provide details of the population breakdown by zone.

Per Capita Expenditure Growth Rates

- 5.9 Base per capita spending levels are derived from 2004-based data supplied by MapInfo/Oxford Econometrics Forecasting¹⁴ for the seven expenditure areas. This data is subsequently projected to 2008 using a combination of 'real' or 'observed' growth rates; and onwards to 2026 based solely on projected growth rates.
- 5.10 The rates that we applied are 4.4 per cent, per annum (comparison sector), and 0.9 per cent, per annum (convenience sector), these being the forecasts for the 2005-2016 period specified in Table 2 of MapInfo/OEF's recently published Information Brief 06/02. No forecasts are provided by Mapinfo for the period beyond 2016; for the period 2016-2026 we have used a slightly lower growth rate of 3.8 per cent, per annum (comparison sector) and 0.7 per cent, per annum (convenience sector), as established by Experian's Retail Planning Briefing Paper 4.0 (October 2006). This reflects our view that it is prudent and desirable to take a cautious and conservative approach given the uncertainties associated with long term forecasts.

Variation of the Retention Rate

- 5.11 As in the NWLRCS, we have applied two sensitivity tests to the retention rate assumption for deriving the comparison forecasts, as set out in Table 4.1.

Table 4.1 Comparison Sector Retention Rate Assumptions

	2004	2008	2011	2016	2021	2026
Static Retention (%)	32	32	32	32	32	32
Rising Retention (%)	32	33	34	36	38	40

- 5.12 The first sensitivity test proceeds on the basis of static market shares, so that the retention rate assumed for the 2004 base position (32 per cent, from the survey of households) stays the same in 2008, 2011, 2016, 2021 and 2026. This figure remains unchanged from the 2005 study.
- 5.13 We continue to believe that it is a desirable planning policy objective to seek an increase in the existing comparison retention rate. Thus, we have again modelled the effects of the OCA retention rate rising, in this case to 40 per cent by 2026, giving an overall increase between 2004 and 2026 of eight percentage points. This is an ambitious target, particularly given the absence of development in the District in recent years, although we would not regard it as inappropriate as a longer-term objective given Coalville's sub-regional centre status. However, given the greater progress that is being made in competitor centres (as outlined in Section 2), we have adopted a slightly more cautious approach than for the preceding study, when we assumed that the OCA retention rate could reach 38 per cent by 2016. For this analysis the retention rate increases by 2 percentage points at each five year interval between 2011 and 2026, following the trend employed in the previous study, albeit from slightly more cautious base.
- 5.14 We do not consider that the OCA retention rate would be able to increase at a quicker rate than this, unless a retail scheme of a significant size, and anchored by mid to higher-end retailers, were to come forward. Should such a development happen, it is theoretically possible that the retention rate within the OCA could improve at a rate faster than that envisaged here.

¹⁴ Per capita spending levels are based on an updated data source. The NWLRCS utilised 2001-based MapInfo data (in 2001 prices). This update utilises 2004-based MapInfo data, in 2004 prices.

- 5.15 As with the 2005 NWLRCS, the retention rate for convenience expenditure is 83 per cent, and given this reasonably high level and the presence of competing stores beyond the District boundary we do not provide an 'uplift' forecast.

Rate of Turnover Efficiency Gain

- 5.16 In its Retail Planner Briefing Note 3.0 of March 2006, Experian states: '*an assumption that [comparison] sales densities are likely to increase at somewhere in the range of 2.0 per cent (the 'moderate' assumption) to 2.5 per cent (the 'historical trend') appears appropriate.*' For the purposes of this update, we have continued to use the 'moderate' assumption of 2.0 per cent, per annum for comparison goods' turnover efficiency gain, as per the 2005 NWLRCS, for both the 'static retention' and 'rising retention' scenarios. For the convenience sector, we have again used a turnover efficiency gain figure of 0.2 per cent, per annum¹⁵
- 5.17 We have used this floorspace efficiency growth rates in two ways: (i) to predict the turnover requirements of existing retailers at the various modelling years; and (ii) to arrive at the sales density ratio which we use to calculate floorspace requirements.

Per Capita Retail Expenditure Projections

- 5.18 The annual consumer retail expenditure per person on comparison goods in the North West Leicestershire OCA is currently £2,814 (for 2004, in 2004 prices) based on an average across the catchment area and after making deductions for SFT of approximately 7 per cent.. In relation to convenience goods expenditure, the year 2004 average for the study area as a whole is £1,591, again after deductions for SFT of approximately 1.5 per cent.
- 5.19 After making deductions for the growth in SFT and assuming growth in available expenditure at 4.4 per cent per annum¹⁶ for comparison goods, we forecast that average per capita expenditure on comparison goods will grow to £3,160 by 2008, to £3,565 by 2011; £4,402 by 2016; £5,306 by 2021 and £6,393 by 2026.
- 5.20 In the convenience sector, we forecast that average per capita expenditure will grow to £1,596 by 2008, to £1,631 by 2011, to £1,700 by 2016; to £1,791 by 2021 and £1,854 by 2026, after making deductions for SFT and assuming growth in available expenditure at 0.9 per cent per annum¹⁷ for convenience goods.

Catchment Retail Expenditure

- 5.21 We have applied the per capita expenditure estimates to the population estimates discussed above. Table 4.2 presents the resultant comparison expenditure data. The total increase in comparison goods expenditure arising over the 2004-26 study period is £392.4m.

¹⁵ Experian's latest published advice in relation to planning for convenience floorspace needs (Briefing Note 3.0) is to use a floorspace efficiency growth rate of 0.75 per cent, per annum. As we mentioned above, Experian intends to publish updated advice on this matter later in the near future, and suggests in paragraph 8.2 of its Briefing Note 4.0 (October 2006) that the central projection for convenience goods floorspace efficiency change is likely to be 0.6 per cent, per annum. However, we consider that both of these annual growth rates (0.75 per cent and 0.6 per cent) are too high, and hence have used an annual growth rate of 0.2 per cent.

¹⁶ 3.8 per cent post-2016

¹⁷ 0.7 per cent post-2016

Table 4.2 Projected Growth in the Comparison Expenditure of OCA Residents, £m (2004 Prices)

	2004 (£m)	2008 (£m)	2011 (£m)	2016 (£m)	2021 (£m)	2026 (£m)	Change 2004-2026 (£m)
Total Comparison Expenditure (Goods Based)	247.8	284.9	327.0	416.5	516.0	640.2	392.4

5.22 The convenience expenditure increase arising between 2004 and 2026 of £45.7m is shown in Table 4.3.

Table 4.3 Projected Growth in the Convenience Expenditure of OCA Residents, £m (2004 Prices)

	2004 (£m)	2008 (£m)	2011 (£m)	2016 (£m)	2021 (£m)	2026 (£m)	Change 2004-2026 (£m)
Total Convenience Expenditure (Goods Based)	140.1	143.9	149.6	160.9	174.2	185.7	45.7

Retail Commitments

5.23 It is necessary to make deductions from any initial surplus of expenditure for the 'claim' of existing retail planning commitments. At present, we are only aware of one significant comparison retail scheme to take into account, which is the proposed retail warehouse development at Nottingham Road, Ashby. The scheme is presently awaiting determination, and the identity of future retail occupants is unknown at present. Therefore for the purposes of our capacity modelling we have retained the assumptions made in the 2005 NWLRCS, i.e. that the scheme, when developed, will draw up to £8m of comparison retail expenditure from the study area once trading, and will increase productivity by 2.0 per cent per annum after 2008.

5.24 In the convenience sector, the only significant outstanding planning permission that needed to be incorporated was the committed Lidl foodstore scheme at Thornborough Road, Coalville, which will have a net sales area of 1,286 sq.m.

Data Inputs - Summary

5.25 The data inputs are summarised in Table 4.4, which also contains details of the corresponding data inputs that we used for the NWLRCS.

Table 4.4 Data Used for the NWLRCS, and Corresponding Data Inputs for this Update

	2005 Study	Update
Per capita expenditure data	2001 data in 2001 prices (supplied by MapInfo)	2004 data in 2004 prices (supplied by MapInfo)
Expenditure growth rates (per capita, per annum)	MapInfo/OEF forecasts (goods based) MapInfo's Information Brief 04/02 <ul style="list-style-type: none"> • Comparison: 3.7% • Convenience: 0.9% 	MapInfo/OEF forecasts (goods based), from MapInfo's Information Brief 06/02 (Sept 2006) <ul style="list-style-type: none"> • Comparison: 4.4% to 2016. 3.8% thereafter • Convenience: 0.9% to 2016; 0.7% thereafter
Rate of annual turnover efficiency gain	Allowance of 2.0% for existing comparison retailers; no allowance for existing convenience retailers.	<ul style="list-style-type: none"> • Allowances of 2.0% for existing comparison retailers and 0.2% for convenience retailers
Significant retail commitments	<ul style="list-style-type: none"> • Comparison: proposed retail warehouse development at Nottingham Road, Ashby • Convenience - none identified 	<ul style="list-style-type: none"> • Comparison - as previous study. Assumed turnover of £8.0m in 2008, rising to £11.4m by 2026. • Convenience - Lidl, Thornborough Road, Coalville
Special forms of trading	<ul style="list-style-type: none"> • Comparison - SFT assumed to account for 8.4% of comparison goods spending throughout the study period • Convenience - SFT assumed to account for 3.2% of comparison goods spending throughout the study period • SFT estimates derived from Experian Retail Planner Briefing Note 2.3D, Table 6.2 	<ul style="list-style-type: none"> • Comparison: SFT assumed to account for 5.7% of comparison goods spending in 2004. Difference in SFT between 2004 and the reporting periods is assumed to be 4.1% in 2008, 6.3% in 2011, and 6.7% in 2016, then remaining at that level to 2026. • Convenience: SFT assumed to account for 2.5% of convenience spending in 2004. Difference in SFT between 2004 and the reporting periods is assumed to be 2.4% in 2008, 3.7% in 2011, and 4.0% in 2016, remaining at that level to 2026. • SFT estimates derived from Experian Retail Planner Briefing Note 2.3D, Table 6.2
Retention rates (comparison sector)	<ul style="list-style-type: none"> • (Static retention): 32% • (Increasing retention): 32% in 2004, increasing to 34% by 2008. 36% by 2011 and 38% by 2016. 	<ul style="list-style-type: none"> • (Static retention): 32% • (Increasing retention): 32% in 2004, increasing to 33% by 2008, 34% by 2011, 36% by 2016, 38% by 2021 and 40% by 2026.
Retention rates (convenience sector)	<ul style="list-style-type: none"> • (Static retention): 83% throughout the study period 	<ul style="list-style-type: none"> • (Static retention): 83% throughout the study period
Population	Population and forecasts from LCC	Base population provided by Leicestershire County Council, at ward level. Data combined to form survey zone populations. Population estimates from later years derived by applying rates of population growth based on district-level forecasts.

Residual Expenditure - Comparison Sector

5.26 Table 4.5 summarises the main deductions for the claims on the initial surplus of the two comparison expenditure modelling scenarios. As the table shows, after allowing for the necessary deductions for 'claims' on the initial surplus of expenditure, a positive residual arises at 2008 under both scenarios, with further positive residuals arising in all subsequent periods. As would be expected, the rising retention model generates considerably higher expenditure residuals, with £122.7m of expenditure available under the increased retention scenario (Scenario B) between 2004 and 2026, compared to £70.4m under the static retention scenario (Scenario A)

- 5.27 Thus, there is a substantial expenditure residual available to support new comparison retail floorspace within the study area, particularly under the rising retention scenarios. Furthermore, because there is only one significant comparison commitment, positive residuals arise in all periods except the initial 2004-08 period.

Table 4.5 Initial Comparison Retail Expenditure Residual Static Retention (Scenarios A and B)

Comparison scenario A - Static Retention						
	2004-2008	2008-11	2011-16	2016-21	2021-26	2004-26
Initial surplus £m	11.8	13.4	28.5	31.7	39.5	124.9
Claims on capacity £m	14.5	5.7	10.3	11.4	12.6	54.5
RESIDUAL £m	-2.7	7.7	18.2	20.3	27.0	70.4
Comparison scenario B - Increased Retention						
	2004-2008	2008-11	2011-16	2016-21	2021-26	2004-26
Initial surplus £m	15.1	17.2	38.7	46.2	60.0	177.2
Claims on capacity £m	14.5	5.7	10.3	11.4	12.6	54.5
RESIDUAL £m	0.6	11.4	28.4	34.8	47.4	122.7

Residual Expenditure - Convenience Sector

- 5.28 Table 4.6 summarises the main deductions for the claims on the initial surplus of convenience expenditure. As can be seen there is a small positive residual in the initial 2004-08 period of £0.2m, although this would be not significant enough to support any new convenience retail development. Greater positive residuals in the subsequent periods can be observed over each of the subsequent periods, with £30.5m available over the whole reporting period.

Table 4.6 Initial Convenience Retail Expenditure Residual - Scenarios 1 to 3 (Static Retention)

Convenience scenario A - Static Retention						
	2004-08	2008-11	2011-16	2016-21	2021-26	2004-26
Initial surplus £m	3.2	4.7	9.4	11.1	9.6	38.1
Claims on capacity £m	3.0	0.8	1.3	1.3	1.3	7.6
RESIDUAL £m	0.2	4.0	8.1	9.9	8.3	30.5

Converting Residual Expenditure to Net Comparison Retail Floorspace Requirements¹⁸

- 5.29 As in the NWLRCS, we have taken a macro approach which, first, assesses the overall or aggregate amount of residual expenditure likely to be generated by residents of the whole of the OCA, and second, makes recommendations as to where, geographically, any resulting floorspace requirements should be met, taking into account the hierarchy of existing centres and the sequential approach. We provide our assessment of potential implications for accommodating any identified floorspace requirements in Section 6.
- 5.30 It is now therefore possible to translate the residual expenditure figures into floorspace projections. In order to calculate this, we have used two turnover efficiency scenarios, which are 'low' and 'high' scenarios. As noted in the 2005 study, the higher rate of

¹⁸ Our floorspace capacity projections should be treated as indicative only. Long-term forecasts to 2026, whilst valuable for strategic planning purposes, should be regarded as subject to increasing uncertainty in the later parts of the study period and should be kept under regular review.

£4,500 per sq.m is typical of 'High Street'-type retail developments¹⁹ whilst the lower level of £2,691 per sq.m is closer to what could be expected to be achieved by a range of 'bulky goods' or retail warehouse-type stores. The turnover efficiency scenarios therefore remain unchanged from those used in the 2005 study.

- 5.31 The assumed floorspace efficiencies described above - together with the corresponding rates used for the 'low' and 'high' scenarios - are shown in Table 4.7 below. The tables also draw together the findings and the outputs from each of the comparison expenditure scenarios - the residual expenditure totals - into theoretical net sales²⁰ floorspace requirements.

Table 4.7 Conversion of Expenditure Surplus to Comparison Floorspace Requirements - Static Retention (Scenarios A and B)

Comparison scenario A - Static Retention						
	2004-08	2008-11	2011-16	2016-21	2021-26	2004-26
Goods-based residual (£m)	-2.7	7.7	18.2	20.3	27.0	70.4
Assumed floorspace efficiency (low) (£ per sq.m sales area)	2,691	2,691	2,691	2,691	2,691	2,691
Floorspace requirement (low) (sq.m sales area)	-1,001	2,854	6,749	7,546	10,017	26,165
Assumed floorspace efficiency (high) (£ per sq.m sales area)	4,500	4,500	4,500	4,500	4,500	4,500
Floorspace requirement (high) (sq.m sales area)	-599	1,707	4,036	4,512	5,990	15,647
Comparison scenario B - Increased Retention						
Goods-based residual (£m)	0.6	11.4	28.4	34.8	47.4	122.7
Assumed floorspace efficiency (low) (£ per sq.m sales area)	2,691	2,691	2,691	2,691	2,691	2,691
Floorspace requirement (low) (sq.m sales area)	240	4,253	10,566	12,925	17,624	45,608
Assumed floorspace efficiency (high) (£ per sq.m sales area)	4,500	4,500	4,500	4,500	4,500	4,500
Floorspace requirement (high) (sq.m sales area)	143	2,543	6,319	7,729	10,539	27,274

- 5.32 The tables show that the 'overall' range of comparison floorspace requirements in the 2004-26 study period ranges from 15,647 sq.m (Scenario A, 'high' floorspace efficiency and static retention) to 45,608 sq.m (Scenario B, 'low' floorspace efficiency and increasing retention). Clearly therefore this range is very wide, and we have included it in this update purely for illustrative purposes.
- 5.33 'Stripping out' two more 'extreme' turnover efficiency growth scenarios (so as to provide a balanced estimation of floorspace requirements, rather than a much larger range of floorspace calculations, which would be considerably more difficult to plan for) leaves the following two sales floorspace figures, which we term the 'mid-point' range:
- a requirement of 26,165 sq.m net by 2026, derived from the 'low' floorspace efficiency and static retention scenario; and

¹⁹ We adopt a higher illustrative turnover per net sq m than in the 2005 study to take into account the longer forecast period

²⁰ Typical net to gross ratios are 70 per cent for 'high street' comparison retail and 80 to 90 per cent for comparison retail warehouses.

- a requirement of 27,274 sq.m net by 2026, derived from the 'high' floorspace efficiency and increasing retention scenario.

Converting Residual Expenditure to Net Convenience Retail Floorspace Requirements

- 5.34 In relation to convenience expenditure, we have used an assumed base sales density range of £5,380 per sq m (low) to £11,000 per sq.m (high), as per the 2005 study. Table 4.8 draws together the findings and converts the outputs and converts this into floorspace requirements for the OCA..

Table 4.8 Conversion of Expenditure Surplus to Convenience Floorspace Requirements

	2004-08	2008-11	2011-16	2016-21	2021-26	2004-26
Goods-based residual (£m)	0.2	4.0	8.1	9.9	8.3	30.5
Assumed floorspace efficiency (£ per sq.m sales area)	11,000	11,000	11,000	11,000	11,000	11,000
Floorspace requirement (sq.m sales area)	21	363	734	897	755	2,770
Assumed floorspace efficiency (£ per sq.m sales area)	5,380	5,380	5,380	5,380	5,380	5,380
Floorspace requirement (sq.m sales area)	43	742	1,501	1,833	1,544	5,663

- 5.35 As can be observed a total of 2,770 sq m - 5,663 sq m of convenience goods floorspace is likely to be required over the reporting period. There is only a minimal floorspace requirement until 2011; however after this point a more significant positive floorspace requirement arises.

Summary

Comparison Retail Sector

- 5.36 For the North West Leicestershire study area as a whole, the range of comparison floorspace requirements (net sales area) arising in the 2004-26 period under our 'mid-point' range - which reduces the effects of the extremes in relation to data inputs - is from 26,165 sq.m to 27,274 sq m. For the reasons made clear in this section, we consider that the higher of these two requirements is an ambitious policy aspiration target. As we have emphasised, this figure is for guidance purposes and should not be treated as a rigid target or ceiling.
- 5.37 It should be noted that the scale of the requirements set out at the higher end of the 'mid-point' range arises as a result of a steady increase in the aggregate study area retention rate over the study period. Achieving the retention rate increase will be dependent on the delivery of schemes that are sufficiently attractive to both investors (developers and operators), and shoppers.
- 5.38 Furthermore, the significant positive capacity residual that arises in the comparison sector by 2026 does not necessarily imply that there is scope for further out-of-centre development; it will be necessary to evaluate any individual proposals as they come forward in the light of the specific format of retailing proposed, and the quanta of identified requirements that exist at the time of the application. Indeed, any proposals which come forward in out-of-centre locations will need to be subject to the stringent application of the five key national development control 'tests' and there must be no risk of any harm to the vitality and viability of the District's town centres, particularly

given our concerns in relation to the relatively modest level of expenditure retention achieved by centres and stores located within the study area.

Convenience Retail Sector

- 5.39 Our work demonstrates that there is a positive quantitative need for further convenience sector floorspace across the OCA as a whole in the period to 2026 - over and above the existing commitment for a foodstore in Coalville to be operated by Lidl.
- 5.40 However, much the identified capacity is generated by expenditure increases in the later part of the study period (i.e. post-2011). Moreover, whilst we acknowledge that the Morrison's store at Whitwick Road, Coalville is likely to trade very well, we have not found evidence of significant and/or widespread over-trading in the District's existing major foodstores.
- 5.41 For these reasons we maintain our NWLRCS conclusion that there is no immediate and pressing need to identify a site or sites for further major foodstore provision in the short term, although the requirement will need to be kept under review, particularly during the post-2011 period when it is likely that further development will be required. Planning applications for proposals coming forward in the District would thus need to be assessed on their individual merits.
- 5.42 Appendices 1 and 2 provide complete tabulations of the comparison and convenience retail capacity forecasts for the District to 2026.

6 ACCOMMODATING IDENTIFIED RETAIL NEEDS

- 6.1 In Section 5, we identified a quantitative 'need' for additional comparison retail floorspace (net sales area) in the 2004-26 study period in the order of 26,000 - 27,000 sq m net.
- 6.2 The scale of the floorspace requirement is substantial. This is illustrated in Table 5.1, which shows that the total requirement arising in the 2004-26 study period equates to more than the aggregate quantum of existing comparison retail floorspace (net sales area) in the District's main centre of Coalville. Thus, it is very likely that some appropriate comparison retail development will have to proceed in the longer term in locations that at present are edge-of-centre, once existing opportunities in more central locations have been exhausted.

Table 5.1 The Scale of the Comparison Floorspace Requirement in the Context of The District's Largest Town Centre (Coalville)

Existing Aggregate Comparison Retail F'space (Net) in Coalville Town Centres	'Mid-range' Comparison F'space Reqt (2004-26)	'Mid-range' Comparison F'space Reqt (2004-26) as a Proportion of Total Existing Aggregate Comparison F'space (Net)
18,991 sq.m	26,165 - 27,274 sq m	137% - 143%

- 6.3 As we have demonstrated, there is very limited quantitative need for further convenience retail floorspace across the OCA as a whole in the period to 2011 - over and above the existing commitment for a foodstore in Coalville - and the scale of floorspace requirements arising in the post-2011 period is modest.

Assessment of Potential Opportunities for Meeting Identified Needs

- 6.4 If the level of comparison retail expenditure retained by the study area as a whole is to improve materially from the current level, then a significant proportion of the floorspace requirements arising by 2026 will need to be directed to Coalville, which contains the District's highest-order centre. Some new comparison retail development in Ashby would also help to improve the study area's overall comparison retention rate, and over time it does appear that it may be realistic to achieve some development given the healthy level of operator interest in the town. However, despite the potential scale of requirements we do not believe that it is reasonable to expect any significant quantum of comparison retail floorspace in other locations within the study area (that is, outside Coalville and Ashby), as all other centres are much more modest in size and role.
- 6.5 Our previous and current study briefs do not require an assessment of specific development opportunities within either centre and accordingly we do not address the scope that may be offered by individual sites. Suffice to say, however, it will be necessary for the Council to fully embrace the PPS6 requirement for a proactive approach to promoting growth and managing change in the District's main centres if a decline in market share is to be avoided. A substantial volume of new comparison retail floorspace will need to be accommodated in the period to 2026 and the District Council - together with its public sector partners - must play a lead role in facilitating the necessary intensification of development within town centres and, if necessary, their geographical expansion.
- 6.6 The market will be likely to dictate that a significant proportion of new comparison retail development will be directed to Coalville as the District's largest centre. The feedback from our latest operator consultation exercise shows that there is some retail operator

demand for representation in the town, and also an encouraging level of interest in Ashby. However, our floorspace requirements are far in excess of known requirements at present - although this position is not unexpected given the long time-frame of the study.

APPENDIX 1

Convenience Goods Capacity

MARKET SHARES FOR CONVENIENCE SPENDING IN 2004

	Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	TOTAL	Beyond Zones	TOTAL
Population and Expenditure											
Population 2004		10,970	10,920	16,630	9,590	9,510	17,280	13,360	88,260		
Expenditure per capita in 2004 (in 2004 prices) £		1,642	1,649	1,627	1,611	1,565	1,547	1,493			
Total Expenditure 2004 £m		18.0	18.0	27.1	15.4	14.9	26.7	19.9	140.1		

Zone 1

Castle Donington	1	0.3	0.0	0.0	0.0	0.0	0.0	0.0		
Kegworth	1	0.1	0.0	0.0	0.0	0.0	0.0	0.0		
Other Zone 1		0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Zone 2

Other	2	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
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Zone 3

Somerfield, Derby Road, Ashby-de-la-Zouch	3	0.0	0.0	0.2	0.1	0.0	0.0	0.0		
Tesco, Resolution Road, Ashby-de-la-Zouch	3	0.0	0.3	0.4	0.4	0.2	0.1	0.1		
Other Ashby-de-la-Zouch	3	0.0	0.0	0.1	0.0	0.0	0.0	0.0		
Other Zone 3		0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Zone 4

Co-op, High Street, Measham	4	0.0	0.0	0.0	0.1	0.0	0.0	0.0		
Other Measham	4	0.0	0.0	0.0	0.1	0.0	0.0	0.0		
Other Zone 4		0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Zone 5

Co-op, Ashby Road, Ibstock	5	0.0	0.0	0.0	0.0	0.4	0.0	0.0		
Other Packington	5	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Other Ibstock Village Centre	5	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Other Zone 5	5	0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Zone 6

Co-op, Bridge Road, Coalville	6	0.0	0.1	0.0	0.0	0.0	0.1	0.1		
Kwik Save, Ashby Road, Coalville	6	0.0	0.0	0.0	0.0	0.0	0.1	0.1		
Morrisons, Whitwick Road, Coalville	6	0.0	0.3	0.0	0.1	0.2	0.4	0.5		
Aldi, Adcock Road, Coalville	6	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Other Coalville	6	0.0	0.0	0.0	0.0	0.0	0.1	0.1		
Other Zone 6	6	0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Zone 7

Co-op, Cropston Drive, Coalville	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Other Cropston Drive Local Centre	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Other Whitwick	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Other Zone 7	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Sub Total for Catchment Area

0.5 0.8 0.9 0.8 0.9 0.9 0.9

Other Areas

Asda, Midland Street, Long Eaton	0	0.2	0.0	0.0	0.0	0.0	0.0	0.0		
Sainsbury's, Civic Way, Swadlincote	0	0.0	0.0	0.1	0.0	0.0	0.0	0.0		
Sainsbury's, Greenclose Lane, Loughborough	0	0.1	0.1	0.0	0.0	0.0	0.0	0.0		
Tesco Express, Cranfleet Way, Long Eaton	0	0.1	0.0	0.0	0.0	0.0	0.0	0.0		
Other shops outside zones	0	0.2	0.1	0.1	0.1	0.1	0.1	0.0		

Sub total for areas outside OCA

0.5 0.2 0.1 0.2 0.1 0.1 0.1

TOTAL

1.0 1.0 1.0 1.0 1.0 1.0 1.0

PATTERN OF CONVENIENCE SPENDING IN 2004

Zone 1

Castle Donington	6.3	0.4	0.0	0.0	0.1	0.0	0.0	6.8	0.0	6.8
Kegworth	0.9	0.1	0.0	0.0	0.1	0.0	0.1	1.2	1.0	2.2
Other Zone 1	0.2	0.0	0.0	0.0	0.0	0.0	0.0			

Zone 2

Other	0.2	0.0	0.0	0.0	0.0	0.0	0.1		0.0	0.0
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Zone 3

Somerfield, Derby Road, Ashby-de-la-Zouch	0.1	0.4	6.3	1.4	0.1	0.3	0.0	8.6	0.0	8.6
Tesco, Resolution Road, Ashby-de-la-Zouch	0.7	4.9	12.1	6.4	2.7	2.9	1.7	31.5	3.0	34.5
Other Ashby-de-la-Zouch	0.0	0.7	1.7	0.3	0.1	0.0	0.0	2.7	0.0	2.7
Other Zone 3	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.8	0.0	0.8

Zone 4

Co-op, High Street, Measham	0.0	0.0	0.0	1.0	0.0	0.0	0.0	1.0	0.0	1.0
Other Measham	0.0	0.0	0.1	0.8	0.0	0.0	0.0	0.9	0.0	0.9
Other Zone 4	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.3	0.0	0.3

Zone 5

Co-op, Ashby Road, Ibstock	0.0	0.0	0.0	0.3	5.2	1.0	0.0	6.5	0.0	6.5
Other Packington	0.0	0.0	0.3	0.0	0.2	0.0	0.0	0.5	0.0	0.5
Other Ibstock Village Centre	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.4	0.0	0.4
Other Zone 5	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.2	0.0	0.2

Zone 6

Co-op, Bridge Road, Coalville	0.0	1.0	0.1	0.1	0.3	2.9	1.3	5.7	0.4	6.1
Kwik Save, Ashby Road, Coalville	0.0	0.6	0.1	0.2	0.3	1.8	1.2	4.2	0.1	4.3
Morrisons, Whitwick Road, Coalville	0.7	5.6	1.2	1.4	3.6	10.7	10.5	33.7	3.0	36.7
Aldi, Adcock Road, Coalville	0.0	0.3	0.2	0.2	0.2	0.8	0.5	2.2	0.1	2.3
Other Coalville	0.0	0.4	0.2	0.2	0.2	2.1	1.6	4.7	0.0	4.7
Other Zone 6	0.1	0.0	0.0	0.0	0.1	1.1	0.3			

Zone 7

Co-op, Cropston Drive, Coalville	0.0	0.0	0.1	0.0	0.0	0.6	0.9	1.6	0.0	1.6
Other Cropston Drive Local Centre	0.0	0.1	0.0	0.0	0.0	0.0	0.1	0.2	0.0	0.2
Other Whitwick	0.0	0.1	0.0	0.0	0.0	0.0	0.2	0.3	0.0	0.3
Other Zone 7	0.0	0.0	0.0	0.1	0.1	0.2	0.4	0.9	0.0	0.9

Sub Total for Catchment Area

9.2 14.6 23.1 12.6 13.8 24.5 18.9 116.8

Other Areas

Asda, Midland Street, Long Eaton	3.5	0.1	0.0	0.1	0.1	0.4	0.0	4.2		
Sainsbury's, Civic Way, Swadlincote	0.0	0.0	1.8	0.8	0.0	0.0	0.0	2.6		
Sainsbury's, Greenclose Lane, Loughborough	1.0	1.2	0.0	0.1	0.0	0.1	0.3	2.7		
Tesco Express, Cranfleet Way, Long Eaton	1.0	0.1	0.0	0.0	0.0	0.0	0.0	1.1		
Other shops outside zones	3.2	2.0	2.1	1.9	0.9	1.8	0.8	12.8		

Sub total for areas outside OCA

8.8 3.4 3.9 2.8 1.1 2.2 1.1 23.3

TOTAL

18.0 18.0 27.1 15.4 14.9 26.7 19.9 140.1

MARKET SHARES FOR CONVENIENCE SPENDING IN 2008

	Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	TOTAL	Beyond Zones	TOTAL
Population and Expenditure											
Population 2008		11,232	11,181	17,027	9,819	9,737	17,693	13,679	90,368		
Expenditure per capita in 2008 (in 2004 prices) £		1,648	1,655	1,633	1,616	1,570	1,553	1,498			
Total Expenditure 2008 £m		18.5	18.5	27.8	15.9	15.3	27.5	20.5	143.9		

Zone 1

Castle Donington	1	0.3	0.0	0.0	0.0	0.0	0.0	0.0		
Kegworth	1	0.1	0.0	0.0	0.0	0.0	0.0	0.0		
Other Zone 1		0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Zone 2

Other	2	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
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Zone 3

Somerfield, Derby Road, Ashby-de-la-Zouch	3	0.0	0.0	0.2	0.1	0.0	0.0	0.0		
Tesco, Resolution Road, Ashby-de-la-Zouch	3	0.0	0.3	0.4	0.4	0.2	0.1	0.1		
Other Ashby-de-la-Zouch	3	0.0	0.0	0.1	0.0	0.0	0.0	0.0		
Other Zone 3		0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Zone 4

Co-op, High Street, Measham	4	0.0	0.0	0.0	0.1	0.0	0.0	0.0		
Other Measham	4	0.0	0.0	0.0	0.1	0.0	0.0	0.0		
Other Zone 4		0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Zone 5

Co-op, Ashby Road, Ibstock	5	0.0	0.0	0.0	0.0	0.4	0.0	0.0		
Other Packington	5	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Other Ibstock Village Centre	5	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Other Zone 5	5	0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Zone 6

Co-op, Bridge Road, Coalville	6	0.0	0.1	0.0	0.0	0.0	0.1	0.1		
Kwik Save, Ashby Road, Coalville	6	0.0	0.0	0.0	0.0	0.0	0.1	0.1		
Morrisons, Whitwick Road, Coalville	6	0.0	0.3	0.0	0.1	0.2	0.4	0.5		
Aldi, Adcock Road, Coalville	6	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Other Coalville	6	0.0	0.0	0.0	0.0	0.0	0.1	0.1		
Other Zone 6	6	0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Zone 7

Co-op, Cropston Drive, Coalville	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Other Cropston Drive Local Centre	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Other Whitwick	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Other Zone 7	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Sub Total for Catchment Area

0.5 0.8 0.9 0.8 0.9 0.9 0.9

Other Areas

Asda, Midland Street, Long Eaton	0	0.2	0.0	0.0	0.0	0.0	0.0	0.0		
Sainsbury's, Civic Way, Swadlincote	0	0.0	0.0	0.1	0.0	0.0	0.0	0.0		
Sainsbury's, Greenclose Lane, Loughborough	0	0.1	0.1	0.0	0.0	0.0	0.0	0.0		
Tesco Express, Cranfleet Way, Long Eaton	0	0.1	0.0	0.0	0.0	0.0	0.0	0.0		
Other shops outside zones	0	0.2	0.1	0.1	0.1	0.1	0.1	0.0		

Sub total for areas outside OCA

0.5 0.2 0.1 0.2 0.1 0.1 0.1

TOTAL

1.0 1.0 1.0 1.0 1.0 1.0 1.0

PATTERN OF CONVENIENCE SPENDING IN 2008

Zone 1

Castle Donington	6.4	0.4	0.0	0.0	0.1	0.0	0.0	7.0	0.0	7.0
Kegworth	0.9	0.1	0.0	0.0	0.1	0.0	0.1	1.2	1.0	2.2
Other Zone 1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Zone 2

Other	0.2	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0
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Zone 3

Somerfield, Derby Road, Ashby-de-la-Zouch	0.1	0.4	6.5	1.4	0.1	0.3	0.0	8.8	0.0	8.8
Tesco, Resolution Road, Ashby-de-la-Zouch	0.8	5.1	12.5	6.6	2.8	3.0	1.7	32.4	3.0	35.4
Other Ashby-de-la-Zouch	0.0	0.7	1.7	0.3	0.1	0.0	0.0	2.8	0.0	2.8
Other Zone 3	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.8	0.0	0.8

Zone 4

Co-op, High Street, Measham	0.0	0.0	0.0	1.0	0.0	0.0	0.0	1.0	0.0	1.0
Other Measham	0.0	0.0	0.1	0.8	0.0	0.0	0.0	0.9	0.0	0.9
Other Zone 4	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.3	0.0	0.3

Zone 5

Co-op, Ashby Road, Ibstock	0.0	0.0	0.0	0.3	5.4	1.1	0.0	6.7	0.0	6.7
Other Packington	0.0	0.0	0.3	0.0	0.2	0.0	0.0	0.5	0.0	0.5
Other Ibstock Village Centre	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.4	0.0	0.4
Other Zone 5	0.0	0.1	0.0	0.0	0.2	0.0	0.0	0.2	0.0	0.2

Zone 6

Co-op, Bridge Road, Coalville	0.0	1.0	0.1	0.1	0.3	3.0	1.3	5.8	0.4	6.2
Kwik Save, Ashby Road, Coalville	0.0	0.6	0.1	0.2	0.3	1.8	1.3	4.3	0.1	4.4
Morrisons, Whitwick Road, Coalville	0.8	5.8	1.2	1.4	3.7	11.0	10.8	34.6	3.0	37.6
Aldi, Adcock Road, Coalville	0.0	0.3	0.2	0.2	0.2	0.8	0.5	2.2	0.1	2.3
Other Coalville	0.0	0.4	0.2	0.2	0.2	2.2	1.6	4.8	0.0	4.8
Other Zone 6	0.1	0.0	0.0	0.0	0.1	1.1	0.3			

Zone 7

Co-op, Cropston Drive, Coalville	0.0	0.0	0.1	0.0	0.0	0.6	0.9	1.7	0.0	1.7
Other Cropston Drive Local Centre	0.0	0.1	0.0	0.0	0.0	0.0	0.1	0.2	0.0	0.2
Other Whitwick	0.0	0.1	0.0	0.0	0.0	0.0	0.2	0.3	0.0	0.3
Other Zone 7	0.0	0.0	0.0	0.1	0.1	0.2	0.5	0.9	0.0	0.9

Sub Total for Catchment Area

9.5 15.0 23.8 13.0 14.2 25.2 19.4 120.0

Other Areas

Asda, Midland Street, Long Eaton	3.6	0.1	0.0	0.1	0.1	0.4	0.0	4.3		
Sainsbury's, Civic Way, Swadlincote	0.0	0.0	1.8	0.8	0.0	0.0	0.0	2.6		
Sainsbury's, Greenclose Lane, Loughborough	1.1	1.2	0.0	0.1	0.0	0.1	0.3	2.8		
Tesco Express, Cranfleet Way, Long Eaton	1.1	0.1	0.0	0.0	0.0	0.0	0.0	1.2		
Other shops outside zones	3.3	2.0	2.2	1.9	1.0	1.8	0.8	13.1		

Sub total for areas outside OCA

9.1 3.4 4.1 2.9 1.1 2.3 1.1 24.0

TOTAL

18.5 18.5 27.8 15.9 15.3 27.5 20.5 144.0

MARKET SHARES FOR CONVENIENCE SPENDING IN 2011

	Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	TOTAL	Beyond Zones	TOTAL
Population and Expenditure											
Population 2011		11,429	11,376	17,325	9,991	9,908	18,002	13,918	91,949		
Expenditure per capita in 2011 (in 2004 prices) £		1,683	1,690	1,668	1,652	1,605	1,587	1,531			
Total Expenditure 2011 £m		19.2	19.2	28.9	16.5	15.9	28.6	21.3	149.6		

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	TOTAL
Zone 1								
Castle Donington	1	0.3	0.0	0.0	0.0	0.0	0.0	0.0
Kegworth	1	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Other Zone 1		0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 2								
Other	2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 3								
Somerfield, Derby Road, Ashby-de-la-Zouch	3	0.0	0.0	0.2	0.1	0.0	0.0	0.0
Tesco, Resolution Road, Ashby-de-la-Zouch	3	0.0	0.3	0.4	0.4	0.2	0.1	0.1
Other Ashby-de-la-Zouch	3	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Other Zone 3		0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 4								
Co-op, High Street, Measham	4	0.0	0.0	0.0	0.1	0.0	0.0	0.0
Other Measham	4	0.0	0.0	0.0	0.1	0.0	0.0	0.0
Other Zone 4		0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 5								
Co-op, Ashby Road, Ibstock	5	0.0	0.0	0.0	0.0	0.4	0.0	0.0
Other Packington	5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Ibstock Village Centre	5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Zone 5	5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 6								
Co-op, Bridge Road, Coalville	6	0.0	0.1	0.0	0.0	0.0	0.1	0.1
Kwik Save, Ashby Road, Coalville	6	0.0	0.0	0.0	0.0	0.0	0.1	0.1
Morrisons, Whitwick Road, Coalville	6	0.0	0.3	0.0	0.1	0.2	0.4	0.5
Aldi, Adcock Road, Coalville	6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Coalville	6	0.0	0.0	0.0	0.0	0.0	0.1	0.1
Other Zone 6	6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 7								
Co-op, Cropston Drive, Coalville	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Cropston Drive Local Centre	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Whitwick	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Zone 7	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub Total for Catchment Area		0.5	0.8	0.9	0.8	0.9	0.9	0.9
Other Areas								
Asda, Midland Street, Long Eaton	0	0.2	0.0	0.0	0.0	0.0	0.0	0.0
Sainsbury's, Civic Way, Swadlincote	0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Sainsbury's, Greenclose Lane, Loughborough	0	0.1	0.1	0.0	0.0	0.0	0.0	0.0
Tesco Express, Cranfleet Way, Long Eaton	0	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Other shops outside zones	0	0.2	0.1	0.1	0.1	0.1	0.1	0.0
Sub total for areas outside OCA		0.5	0.2	0.1	0.2	0.1	0.1	0.1
TOTAL		1.0	1.0	1.0	1.0	1.0	1.0	1.0

PATTERN OF CONVENIENCE SPENDING IN 2011

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	TOTAL	Beyond Zones	TOTAL	
Zone 1											
Castle Donington		6.7	0.4	0.0	0.0	0.1	0.0	0.0	7.2	0.0	7.2
Kegworth		1.0	0.1	0.0	0.0	0.1	0.0	0.1	1.3	1.0	2.3
Other Zone 1		0.2	0.0	0.0	0.0	0.0	0.0	0.0			
Zone 2											
Other		0.2	0.0	0.0	0.0	0.0	0.0	0.1		0.0	0.0
Zone 3											
Somerfield, Derby Road, Ashby-de-la-Zouch		0.1	0.4	6.7	1.5	0.1	0.3	0.0	9.2	0.0	9.2
Tesco, Resolution Road, Ashby-de-la-Zouch		0.8	5.3	13.0	6.8	2.9	3.1	1.8	33.7	3.0	36.7
Other Ashby-de-la-Zouch		0.0	0.8	1.8	0.3	0.1	0.0	0.0	2.9	0.0	2.9
Other Zone 3		0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.9	0.0	0.9
Zone 4											
Co-op, High Street, Measham		0.0	0.0	0.0	1.1	0.0	0.0	0.0	1.1	0.0	1.1
Other Measham		0.0	0.0	0.1	0.9	0.0	0.0	0.0	1.0	0.0	1.0
Other Zone 4		0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.3	0.0	0.3
Zone 5											
Co-op, Ashby Road, Ibstock		0.0	0.0	0.0	0.3	5.6	1.1	0.0	7.0	0.0	7.0
Other Packington		0.0	0.0	0.3	0.0	0.2	0.0	0.0	0.5	0.0	0.5
Other Ibstock Village Centre		0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.4	0.0	0.4
Other Zone 5		0.0	0.1	0.0	0.0	0.2	0.0	0.0	0.3	0.0	0.3
Zone 6											
Co-op, Bridge Road, Coalville		0.0	1.0	0.1	0.1	0.3	3.1	1.4	6.1	0.4	6.5
Kwik Save, Ashby Road, Coalville		0.0	0.7	0.1	0.2	0.3	1.9	1.3	4.5	0.1	4.6
Morrisons, Whitwick Road, Coalville		0.8	6.0	1.3	1.5	3.8	11.4	11.2	36.0	3.0	39.0
Aldi, Adcock Road, Coalville		0.0	0.3	0.2	0.2	0.2	0.9	0.5	2.3	0.1	2.4
Other Coalville		0.0	0.4	0.2	0.2	0.2	2.3	1.7	5.0	0.0	5.0
Other Zone 6		0.1	0.0	0.0	0.0	0.1	1.1	0.3			
Zone 7											
Co-op, Cropston Drive, Coalville		0.0	0.0	0.1	0.0	0.0	0.7	1.0	1.7	0.0	1.7
Other Cropston Drive Local Centre		0.0	0.1	0.0	0.0	0.0	0.0	0.1	0.2	0.0	0.2
Other Whitwick		0.0	0.1	0.0	0.0	0.0	0.0	0.2	0.3	0.0	0.3
Other Zone 7		0.0	0.0	0.0	0.1	0.1	0.2	0.5	0.9	0.0	0.9
Sub Total for Catchment Area		9.8	15.6	24.7	13.5	14.8	26.2	20.1	124.7		
Other Areas											
Asda, Midland Street, Long Eaton		3.8	0.1	0.0	0.1	0.1	0.4	0.0	4.5		
Sainsbury's, Civic Way, Swadlincote		0.0	0.0	1.9	0.8	0.0	0.0	0.0	2.7		
Sainsbury's, Greenclose Lane, Loughborough		1.1	1.3	0.0	0.1	0.0	0.1	0.3	2.9		
Tesco Express, Cranfleet Way, Long Eaton		1.1	0.1	0.0	0.0	0.0	0.0	0.0	1.2		
Other shops outside zones		3.5	2.1	2.3	2.0	1.0	1.9	0.9	13.6		
Sub total for areas outside OCA		9.4	3.6	4.2	3.0	1.1	2.4	1.2	24.9		
TOTAL		19.2	19.2	28.9	16.5	15.9	28.6	21.3	149.7		

MARKET SHARES FOR CONVENIENCE SPENDING IN 2016

	Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	TOTAL	Beyond Zones	TOTAL
Population and Expenditure											
Population 2016		11,786	11,733	17,867	10,304	10,218	18,566	14,354	94,827		
Expenditure per capita in 2016 (in 2006 prices) £		1,755	1,762	1,740	1,722	1,673	1,654	1,596			
Total Expenditure 2016 £m		20.7	20.7	31.1	17.7	17.1	30.7	22.9	160.9		

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	TOTAL
Zone 1								
Castle Donington	1	0.3	0.0	0.0	0.0	0.0	0.0	0.0
Kegworth	1	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Other Zone 1		0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 2								
Other	2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 3								
Somerfield, Derby Road, Ashby-de-la-Zouch	3	0.0	0.0	0.2	0.1	0.0	0.0	0.0
Tesco, Resolution Road, Ashby-de-la-Zouch	3	0.0	0.3	0.4	0.4	0.2	0.1	0.1
Other Ashby-de-la-Zouch	3	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Other Zone 3		0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 4								
Co-op, High Street, Measham	4	0.0	0.0	0.0	0.1	0.0	0.0	0.0
Other Measham	4	0.0	0.0	0.0	0.1	0.0	0.0	0.0
Other Zone 4		0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 5								
Co-op, Ashby Road, Ibstock	5	0.0	0.0	0.0	0.0	0.4	0.0	0.0
Other Packington	5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Ibstock Village Centre	5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Zone 5	5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 6								
Co-op, Bridge Road, Coalville	6	0.0	0.1	0.0	0.0	0.0	0.1	0.1
Kwik Save, Ashby Road, Coalville	6	0.0	0.0	0.0	0.0	0.0	0.1	0.1
Morrisons, Whitwick Road, Coalville	6	0.0	0.3	0.0	0.1	0.2	0.4	0.5
Aldi, Adcock Road, Coalville	6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Coalville	6	0.0	0.0	0.0	0.0	0.0	0.1	0.1
Other Zone 6	6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 7								
Co-op, Cropston Drive, Coalville	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Cropston Drive Local Centre	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Whitwick	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Zone 7	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub Total for Catchment Area		0.5	0.8	0.9	0.8	0.9	0.9	0.9
Other Areas								
Asda, Midland Street, Long Eaton	0	0.2	0.0	0.0	0.0	0.0	0.0	0.0
Sainsbury's, Civic Way, Swadlincote	0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Sainsbury's, Greenclose Lane, Loughborough	0	0.1	0.1	0.0	0.0	0.0	0.0	0.0
Tesco Express, Cranfleet Way, Long Eaton	0	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Other shops outside zones	0	0.2	0.1	0.1	0.1	0.1	0.1	0.0
Sub total for areas outside OCA		0.5	0.2	0.1	0.2	0.1	0.1	0.1
TOTAL		1.0	1.0	1.0	1.0	1.0	1.0	1.0

PATTERN OF CONVENIENCE SPENDING IN 2016

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	TOTAL	Beyond Zones	TOTAL	
Zone 1											
Castle Donington		7.2	0.5	0.0	0.0	0.1	0.0	0.0	7.8	0.0	7.8
Kegworth		1.0	0.1	0.0	0.0	0.1	0.0	0.1	1.3	1.0	2.3
Other Zone 1		0.2	0.0	0.0	0.0	0.0	0.0	0.0			
Zone 2											
Other		0.2	0.0	0.0	0.0	0.0	0.0	0.1		0.0	0.0
Zone 3											
Somerfield, Derby Road, Ashby-de-la-Zouch		0.1	0.4	7.2	1.6	0.1	0.4	0.0	9.8	0.0	9.8
Tesco, Resolution Road, Ashby-de-la-Zouch		0.9	5.6	13.9	7.3	3.1	3.4	1.9	36.2	3.0	39.2
Other Ashby-de-la-Zouch		0.0	0.8	1.9	0.3	0.1	0.0	0.0	3.2	0.0	3.2
Other Zone 3		0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.9	0.0	0.9
Zone 4											
Co-op, High Street, Measham		0.0	0.0	0.0	1.2	0.0	0.0	0.0	1.2	0.0	1.2
Other Measham		0.0	0.0	0.1	0.9	0.0	0.0	0.0	1.0	0.0	1.0
Other Zone 4		0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.4	0.0	0.4
Zone 5											
Co-op, Ashby Road, Ibstock		0.0	0.0	0.0	0.3	6.0	1.2	0.0	7.5	0.0	7.5
Other Packington		0.0	0.0	0.3	0.0	0.2	0.0	0.0	0.5	0.0	0.5
Other Ibstock Village Centre		0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.4	0.0	0.4
Other Zone 5		0.0	0.1	0.0	0.0	0.2	0.0	0.0	0.3	0.0	0.3
Zone 6											
Co-op, Bridge Road, Coalville		0.0	1.1	0.1	0.1	0.4	3.3	1.5	6.5	0.4	6.9
Kwik Save, Ashby Road, Coalville		0.0	0.7	0.1	0.2	0.4	2.0	1.4	4.8	0.1	4.9
Morrisons, Whitwick Road, Coalville		0.9	6.5	1.4	1.6	4.1	12.3	12.0	38.7	3.0	41.7
Aldi, Adcock Road, Coalville		0.0	0.3	0.2	0.2	0.2	0.9	0.5	2.5	0.1	2.6
Other Coalville		0.0	0.4	0.2	0.2	0.2	2.5	1.8	5.4	0.0	5.4
Other Zone 6		0.1	0.0	0.0	0.0	0.1	1.2	0.3			
Zone 7											
Co-op, Cropston Drive, Coalville		0.0	0.0	0.1	0.0	0.0	0.7	1.1	1.9	0.0	1.9
Other Cropston Drive Local Centre		0.0	0.1	0.0	0.0	0.0	0.0	0.1	0.2	0.0	0.2
Other Whitwick		0.0	0.1	0.0	0.0	0.0	0.0	0.3	0.4	0.0	0.4
Other Zone 7		0.0	0.0	0.0	0.1	0.1	0.2	0.5	1.0	0.0	1.0
Sub Total for Catchment Area		10.6	16.8	26.6	14.5	15.9	28.2	21.7	134.1		
Other Areas											
Asda, Midland Street, Long Eaton		4.0	0.1	0.0	0.1	0.2	0.4	0.0	4.8		
Sainsbury's, Civic Way, Swadlincote		0.0	0.0	2.1	0.9	0.0	0.0	0.0	2.9		
Sainsbury's, Greenclose Lane, Loughborough		1.2	1.4	0.0	0.1	0.0	0.1	0.3	3.1		
Tesco Express, Cranfleet Way, Long Eaton		1.2	0.1	0.0	0.0	0.0	0.0	0.0	1.3		
Other shops outside zones		3.7	2.2	2.5	2.2	1.1	2.1	0.9	14.7		
Sub total for areas outside OCA		10.1	3.9	4.5	3.3	1.2	2.6	1.3	26.8		
TOTAL		20.7	20.7	31.1	17.7	17.1	30.7	22.9	160.9		

MARKET SHARES FOR CONVENIENCE SPENDING IN 2021

	Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	TOTAL	Beyond Zones	TOTAL
Population and Expenditure											
Population 2021		12,117	12,062	18,369	10,593	10,505	19,087	14,757	97,492		
Expenditure per capita in 2021 (in 2004 prices) £		1,849	1,856	1,832	1,813	1,762	1,742	1,681			
Total Expenditure 2021 £m		22.4	22.4	33.7	19.2	18.5	33.3	24.8	174.2		

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	TOTAL
Zone 1								
Castle Donington	1	0.3	0.0	0.0	0.0	0.0	0.0	0.0
Kegworth	1	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Other Zone 1		0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 2								
Other	2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 3								
Somerfield, Derby Road, Ashby-de-la-Zouch	3	0.0	0.0	0.2	0.1	0.0	0.0	0.0
Tesco, Resolution Road, Ashby-de-la-Zouch	3	0.0	0.3	0.4	0.4	0.2	0.1	0.1
Other Ashby-de-la-Zouch	3	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Other Zone 3		0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 4								
Co-op, High Street, Measham	4	0.0	0.0	0.0	0.1	0.0	0.0	0.0
Other Measham	4	0.0	0.0	0.0	0.1	0.0	0.0	0.0
Other Zone 4		0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 5								
Co-op, Ashby Road, Ibstock	5	0.0	0.0	0.0	0.0	0.4	0.0	0.0
Other Packington	5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Ibstock Village Centre	5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Zone 5	5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 6								
Co-op, Bridge Road, Coalville	6	0.0	0.1	0.0	0.0	0.0	0.1	0.1
Kwik Save, Ashby Road, Coalville	6	0.0	0.0	0.0	0.0	0.0	0.1	0.1
Morrisons, Whitwick Road, Coalville	6	0.0	0.3	0.0	0.1	0.2	0.4	0.5
Aldi, Adcock Road, Coalville	6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Coalville	6	0.0	0.0	0.0	0.0	0.0	0.1	0.1
Other Zone 6	6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 7								
Co-op, Cropston Drive, Coalville	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Cropston Drive Local Centre	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Whitwick	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Zone 7	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub Total for Catchment Area		0.5	0.8	0.9	0.8	0.9	0.9	0.9
Other Areas								
Asda, Midland Street, Long Eaton	0	0.2	0.0	0.0	0.0	0.0	0.0	0.0
Sainsbury's, Civic Way, Swadlincote	0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Sainsbury's, Greenclose Lane, Loughborough	0	0.1	0.1	0.0	0.0	0.0	0.0	0.0
Tesco Express, Cranfleet Way, Long Eaton	0	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Other shops outside zones	0	0.2	0.1	0.1	0.1	0.1	0.1	0.0
Sub total for areas outside OCA		0.5	0.2	0.1	0.2	0.1	0.1	0.1
TOTAL		1.0	1.0	1.0	1.0	1.0	1.0	1.0

PATTERN OF CONVENIENCE SPENDING IN 2021

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	TOTAL	Beyond Zones	TOTAL	
Zone 1											
Castle Donington		7.8	0.5	0.0	0.0	0.1	0.0	0.0	8.4	0.0	8.4
Kegworth		1.1	0.1	0.0	0.0	0.1	0.0	0.1	1.5	1.0	2.5
Other Zone 1		0.2	0.0	0.0	0.0	0.0	0.0	0.0			
Zone 2											
Other		0.2	0.0	0.0	0.0	0.0	0.0	0.1		0.0	0.0
Zone 3											
Somerfield, Derby Road, Ashby-de-la-Zouch		0.1	0.4	7.8	1.7	0.1	0.4	0.0	10.7	0.0	10.7
Tesco, Resolution Road, Ashby-de-la-Zouch		0.9	6.1	15.1	7.9	3.4	3.7	2.1	39.2	3.0	42.2
Other Ashby-de-la-Zouch		0.0	0.9	2.1	0.4	0.1	0.0	0.0	3.4	0.0	3.4
Other Zone 3		0.0	0.0	1.0	0.0	0.0	0.0	0.0	1.0	0.0	1.0
Zone 4											
Co-op, High Street, Measham		0.0	0.0	0.0	1.2	0.0	0.0	0.0	1.2	0.0	1.2
Other Measham		0.0	0.0	0.1	1.0	0.0	0.0	0.0	1.1	0.0	1.1
Other Zone 4		0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.4	0.0	0.4
Zone 5											
Co-op, Ashby Road, Ibstock		0.0	0.0	0.0	0.3	6.5	1.3	0.0	8.1	0.0	8.1
Other Packington		0.0	0.0	0.3	0.0	0.3	0.0	0.0	0.6	0.0	0.6
Other Ibstock Village Centre		0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.4	0.0	0.4
Other Zone 5		0.0	0.1	0.0	0.0	0.2	0.0	0.0	0.3	0.0	0.3
Zone 6											
Co-op, Bridge Road, Coalville		0.0	1.2	0.1	0.1	0.4	3.6	1.6	7.1	0.4	7.5
Kwik Save, Ashby Road, Coalville		0.0	0.8	0.1	0.2	0.4	2.2	1.5	5.2	0.1	5.3
Morrisons, Whitwick Road, Coalville		0.9	7.0	1.5	1.7	4.4	13.3	13.0	41.9	3.0	44.9
Aldi, Adcock Road, Coalville		0.0	0.4	0.2	0.3	0.3	1.0	0.6	2.7	0.1	2.8
Other Coalville		0.0	0.5	0.3	0.2	0.2	2.7	2.0	5.8	0.0	5.8
Other Zone 6		0.1	0.0	0.0	0.0	0.1	1.3	0.3			
Zone 7											
Co-op, Cropston Drive, Coalville		0.0	0.0	0.1	0.0	0.0	0.8	1.1	2.0	0.0	2.0
Other Cropston Drive Local Centre		0.0	0.1	0.0	0.0	0.0	0.0	0.1	0.2	0.0	0.2
Other Whitwick		0.0	0.1	0.0	0.0	0.0	0.0	0.3	0.4	0.0	0.4
Other Zone 7		0.0	0.0	0.0	0.1	0.1	0.2	0.5	1.1	0.0	1.1
Sub Total for Catchment Area		11.4	18.2	28.8	15.7	17.2	30.5	23.4	145.2		
Other Areas											
Asda, Midland Street, Long Eaton		4.4	0.1	0.0	0.1	0.2	0.4	0.0	5.2		
Sainsbury's, Civic Way, Swadlincote		0.0	0.0	2.2	0.9	0.0	0.0	0.0	3.2		
Sainsbury's, Greenclose Lane, Loughborough		1.3	1.5	0.0	0.1	0.0	0.1	0.4	3.3		
Tesco Express, Cranfleet Way, Long Eaton		1.3	0.1	0.0	0.0	0.0	0.0	0.0	1.4		
Other shops outside zones		4.0	2.4	2.7	2.3	1.2	2.2	1.0	15.9		
Sub total for areas outside OCA		11.0	4.2	4.9	3.5	1.3	2.8	1.4	29.0		
TOTAL		22.4	22.4	33.7	19.2	18.5	33.3	24.8	174.3		

MARKET SHARES FOR CONVENIENCE SPENDING IN 2026

	Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	TOTAL	Beyond Zones	TOTAL
Population and Expenditure											
Population 2026		12,476	12,419	18,913	10,907	10,816	19,652	15,194	100,378		
Expenditure per capita in 2026 (in 2004 prices) £		1,914	1,922	1,897	1,878	1,824	1,804	1,740			
Total Expenditure 2026 £m		23.9	23.9	35.9	20.5	19.7	35.5	26.4	185.7		

Zone 1

Castle Donington	1	0.3	0.0	0.0	0.0	0.0	0.0	0.0		
Kegworth	1	0.1	0.0	0.0	0.0	0.0	0.0	0.0		
Other Zone 1		0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Zone 2

Other	2	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
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Zone 3

Somerfield, Derby Road, Ashby-de-la-Zouch	3	0.0	0.0	0.2	0.1	0.0	0.0	0.0		
Tesco, Resolution Road, Ashby-de-la-Zouch	3	0.0	0.3	0.4	0.4	0.2	0.1	0.1		
Other Ashby-de-la-Zouch	3	0.0	0.0	0.1	0.0	0.0	0.0	0.0		
Other Zone 3		0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Zone 4

Co-op, High Street, Measham	4	0.0	0.0	0.0	0.1	0.0	0.0	0.0		
Other Measham	4	0.0	0.0	0.0	0.1	0.0	0.0	0.0		
Other Zone 4		0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Zone 5

Co-op, Ashby Road, Ibstock	5	0.0	0.0	0.0	0.0	0.4	0.0	0.0		
Other Packington	5	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Other Ibstock Village Centre	5	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Other Zone 5	5	0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Zone 6

Co-op, Bridge Road, Coalville	6	0.0	0.1	0.0	0.0	0.0	0.1	0.1		
Kwik Save, Ashby Road, Coalville	6	0.0	0.0	0.0	0.0	0.0	0.1	0.1		
Morrisons, Whitwick Road, Coalville	6	0.0	0.3	0.0	0.1	0.2	0.4	0.5		
Aldi, Adcock Road, Coalville	6	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Other Coalville	6	0.0	0.0	0.0	0.0	0.0	0.1	0.1		
Other Zone 6	6	0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Zone 7

Co-op, Cropston Drive, Coalville	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Other Cropston Drive Local Centre	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Other Whitwick	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Other Zone 7	7	0.0	0.0	0.0	0.0	0.0	0.0	0.0		

Sub Total for Catchment Area

0.5 0.8 0.9 0.8 0.9 0.9 0.9

Other Areas

Asda, Midland Street, Long Eaton	0	0.2	0.0	0.0	0.0	0.0	0.0	0.0		
Sainsbury's, Civic Way, Swadlincote	0	0.0	0.0	0.1	0.0	0.0	0.0	0.0		
Sainsbury's, Greenclose Lane, Loughborough	0	0.1	0.1	0.0	0.0	0.0	0.0	0.0		
Tesco Express, Cranfleet Way, Long Eaton	0	0.1	0.0	0.0	0.0	0.0	0.0	0.0		
Other shops outside zones	0	0.2	0.1	0.1	0.1	0.1	0.1	0.0		

Sub total for areas outside OCA

0.5 0.2 0.1 0.2 0.1 0.1 0.1

TOTAL

1.0 1.0 1.0 1.0 1.0 1.0 1.0

PATTERN OF CONVENIENCE SPENDING IN 2026

Zone 1

Castle Donington		8.3	0.6	0.0	0.0	0.1	0.0	0.0	9.0	0.0	9.0
Kegworth		1.2	0.1	0.0	0.0	0.1	0.0	0.1	1.6	1.0	2.6
Other Zone 1		0.3	0.0	0.0	0.0	0.0	0.0	0.0			

Zone 2

Other		0.2	0.0	0.0	0.0	0.0	0.0	0.1		0.0	0.0
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Zone 3

Somerfield, Derby Road, Ashby-de-la-Zouch		0.1	0.5	8.3	1.8	0.1	0.4	0.0	11.4	0.0	11.4
Tesco, Resolution Road, Ashby-de-la-Zouch		1.0	6.5	16.1	8.5	3.6	3.9	2.2	41.8	3.0	44.8
Other Ashby-de-la-Zouch		0.0	0.9	2.2	0.4	0.1	0.0	0.0	3.6	0.0	3.6
Other Zone 3		0.0	0.0	1.1	0.0	0.0	0.0	0.0	1.1	0.0	1.1

Zone 4

Co-op, High Street, Measham		0.0	0.0	0.0	1.3	0.0	0.0	0.0	1.3	0.0	1.3
Other Measham		0.0	0.0	0.1	1.1	0.0	0.0	0.0	1.2	0.0	1.2
Other Zone 4		0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.4	0.0	0.4

Zone 5

Co-op, Ashby Road, Ibstock		0.0	0.0	0.0	0.4	6.9	1.4	0.0	8.7	0.0	8.7
Other Packington		0.0	0.0	0.4	0.0	0.3	0.0	0.0	0.6	0.0	0.6
Other Ibstock Village Centre		0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.5	0.0	0.5
Other Zone 5		0.0	0.1	0.0	0.0	0.2	0.0	0.0	0.3	0.0	0.3

Zone 6

Co-op, Bridge Road, Coalville		0.0	1.3	0.2	0.1	0.4	3.9	1.7	7.5	0.4	7.9
Kwik Save, Ashby Road, Coalville		0.0	0.8	0.1	0.3	0.4	2.4	1.6	5.6	0.1	5.7
Morrisons, Whitwick Road, Coalville		1.0	7.4	1.6	1.8	4.7	14.2	13.9	44.7	3.0	47.7
Aldi, Adcock Road, Coalville		0.0	0.4	0.2	0.3	0.3	1.1	0.6	2.9	0.1	3.0
Other Coalville		0.0	0.5	0.3	0.3	0.2	2.8	2.1	6.2	0.0	6.2
Other Zone 6		0.1	0.0	0.0	0.0	0.1	1.4	0.4			

Zone 7

Co-op, Cropston Drive, Coalville		0.0	0.0	0.1	0.0	0.0	0.8	1.2	2.1	0.0	2.1
Other Cropston Drive Local Centre		0.0	0.1	0.0	0.0	0.0	0.0	0.1	0.2	0.0	0.2
Other Whitwick		0.0	0.1	0.0	0.0	0.0	0.0	0.3	0.4	0.0	0.4
Other Zone 7		0.0	0.0	0.0	0.1	0.1	0.3	0.6	1.1	0.0	1.1

Sub Total for Catchment Area

12.2 19.4 30.7 16.7 18.3 32.5 25.0 154.8

Other Areas

Asda, Midland Street, Long Eaton		4.7	0.1	0.0	0.1	0.2	0.5	0.0	5.6		
Sainsbury's, Civic Way, Swadlincote		0.0	0.0	2.4	1.0	0.0	0.0	0.0	3.4		
Sainsbury's, Greenclose Lane, Loughborough		1.4	1.6	0.0	0.1	0.0	0.1	0.4	3.6		
Tesco Express, Cranfleet Way, Long Eaton		1.4	0.1	0.0	0.0	0.0	0.0	0.0	1.5		
Other shops outside zones		4.3	2.6	2.9	2.5	1.2	2.4	1.1	16.9		

Sub total for areas outside OCA

11.7 4.5 5.2 3.8 1.4 2.9 1.5 30.9

TOTAL

23.9 23.9 35.9 20.5 19.7 35.5 26.5 185.8

Summary of Capacity, for Convenience Goods Base Scenario A
Static retention rate @ 84%, static existing turnover growth @ 0.2%

	2004	2008	2011	2016	2021	2026	Change 2004-08	Change 2008-11	Change 2011-16	Change 2016-21	Change 2021-26	Change 2004-26
Total Population	88,260	90,368	91,949	94,827	97,492	100,378	2,108	1,581	2,878	2,665	2,886	12,118
Total Expenditure £m	140.1	143.9	149.6	160.9	174.2	185.7	3.9	5.7	11.3	13.3	11.5	45.7
Retained Expenditure £m	116.8	120.0	124.7	134.1	145.2	154.8	3.2	4.7	9.4	11.1	9.6	38.1
Retained Expenditure %	83.4	83.4	83.4	83.4	83.4	83.4						
Leakage £m	23.3	24.0	24.9	26.8	29.0	30.9	0.6	0.9	1.9	2.2	1.9	7.6
Inflow £m												
Total Turnover of Convenience Stores in OCA £m	116.8	120.0	124.7	134.1	145.2	154.8	3.2	4.7	9.4	11.1	9.6	38.1
Initial Surplus £m/annum (Growth in Retained Expenditure)							3.2	4.7	9.4	11.1	9.6	38.1
Claims on Expenditure												
Existing Traders	0.0	0.9	1.6	2.8	4.0	5.2	0.9	0.7	1.2	1.2	1.2	5.2
Commitments	0.0	2.1	2.1	2.2	2.3	2.3	2.1	0.0	0.1	0.1	0.1	2.3
Special Forms of Trading	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Impact on capacity £m		3.0	3.7	5.0	6.3	7.6	3.0	0.8	1.3	1.3	1.3	7.6
SUMMARY							2004-08	2007-11	2011-16	2016-21	2021-26	2004-26
Initial surplus £m							3.2	4.7	9.4	11.1	9.6	38.1
Claims on capacity £m							3.0	0.8	1.3	1.3	1.3	7.6
RESIDUAL £m							0.2	4.0	8.1	9.9	8.3	30.5
Turnover per sq m (high)							11000	11000	11000	11000	11000	11000
Floorspace Requirement sq m							21	363	734	897	755	2,770
Turnover per sq m (low)							5380	5380	5380	5380	5380	5380
Floorspace Requirement sq m							43	742	1,501	1,833	1,544	5,663

APPENDIX 2

Comparison Goods Capacity

MARKET SHARES FOR COMPARISON SPEND IN 2004

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total	Beyond Zones	TOTAL	Firspce	T/O psf
Population and Expenditure													
Population 2004		10,970	10,920	16,630	9,590	9,510	17,280	13,360	88,260				
Expenditure per capita in 2004 (in 2004 prices) £		2,938	2,928	2,925	2,889	2,744	2,724	2,551					
Total Expenditure 2007 £m		32.2	32.0	48.6	27.7	26.1	47.1	34.1	247.8				
Zone 1													
Others	1	3.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%					
Zone 2													
Others		0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%					
Zone 3													
Ashby-de-la-Zouch Town Centre	3	1.0%	4.5%	15.5%	13.0%	3.7%	2.9%	0.6%					
Others		0.0%	1.0%	3.0%	3.0%	0.0%	0.0%	0.0%					
Zone 4													
Others	4	0.0%	0.5%	0.6%	1.9%	1.5%	0.6%	0.7%					
Zone 5													
Ibstock Village Centre	5	0.0%	0.3%	0.2%	0.5%	7.2%	1.4%	0.6%					
Others		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%					
Zone 6													
Coalville Town Centre	6	1.5%	15.3%	7.0%	9.1%	26.0%	34.0%	32.6%					
Coalville Retail Warehouses	6	0.8%	1.5%	1.0%	2.0%	7.1%	6.7%	5.7%					
Others Zone 6	6	0.0%	0.0%	0.0%	0.0%	1.0%	0.2%	0.2%					
Zone 7													
Others	7	0.0%	0.3%	0.0%	0.0%	0.0%	0.4%	0.0%					
Sub-total for catchment area	0	6.3%	23.8%	27.6%	29.5%	46.5%	46.1%	40.4%					
Other Centres/Stores													
Burton-upon-Trent Town Centre	0	0.4%	1.2%	32.0%	25.0%	4.5%	2.2%	1.7%					
Derby City Centre	0	28.9%	3.8%	9.0%	2.8%	0.2%	0.9%	0.2%					
Leicester City Centre	0	1.2%	21.0%	9.5%	8.0%	29.3%	25.1%	28.3%					
Long Eaton Town Centre	0	9.9%	0.0%	0.0%	0.3%	0.2%	0.3%	0.0%					
Loughborough Town Centre	0	16.0%	22.0%	1.0%	0.6%	5.2%	7.6%	14.7%					
Nottingham City Centre	0	22.0%	9.4%	3.1%	1.9%	2.1%	1.0%	2.6%					
Fosse Park, Leicester	0	1.0%	5.0%	1.2%	0.6%	2.4%	4.0%	2.0%					
Tamworth	0	0.0%	0.3%	1.6%	13.0%	1.3%	0.8%	0.5%					
Birmingham	0	0.5%	0.5%	1.0%	2.0%	0.2%	0.1%	0.0%					
Catalogue, internet etc	0	9.8%	8.6%	9.5%	10.9%	6.0%	7.2%	6.6%					
Other out of catchment	0	4.0%	4.4%	4.5%	5.4%	2.3%	4.7%	3.1%					
Sub-total for outside catchment	0	93.7%	76.2%	72.4%	70.5%	53.6%	53.9%	59.6%					
TOTAL	0	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%					

PATTERN OF COMPARISON SPEND IN 2004

Zone 1													
Others	1	0.97	0.00	0.18	0.00	0.00	0.00	0.00					
Zone 2													
Others	2	0.00	0.16	0.00	0.00	0.00	0.00	0.00					
Zone 3													
Ashby de la Zouch Town Centre	3	0.32	1.44	7.54	3.60	0.96	1.36	0.20	15.43	2.00	17.43	80471	217
Others	3	0.00	0.32	1.46	0.83	0.00	0.00	0.00	2.61				
Zone 4													
Others	4	0.00	0.16	0.27	0.52	0.40	0.26	0.23	1.84				
Zone 5													
Ibstock Village Centre	5	0.00	0.08	0.08	0.15	1.88	0.65	0.21					
Others	5	0.00	0.00	0.00	0.00	0.00	0.00	0.00					
Zone 6													
Coalville Town Centre	6	0.48	4.89	3.41	2.52	6.79	16.01	11.11	45.20	7.00	52.20	204417	255
Coalville Retail Warehouses	6	0.26	0.48	0.49	0.55	1.85	3.15	1.94	8.73	2.00	10.73	65584	164
Other Zone 6	6	0.00	0.00	0.00	0.00	0.26	0.09	0.07					
Zone 7													
Others	7	0.00	0.08	0.02	0.00	0.00	0.19	0.00					
Sub-total for catchment area		2.03	7.62	13.43	8.18	12.13	21.72	13.76	78.87				
Other Centres/Stores													
Burton-upon-Trent Town Centre	0	0.12	0.39	15.57	6.93	1.17	1.04	0.58					
Derby City Centre	0	9.32	1.21	4.38	0.79	0.05	0.40	0.06					
Leicester City Centre	0	0.39	6.71	4.62	2.22	7.64	11.81	9.65	43.04				
Long Eaton Town Centre	0	3.20	0.00	0.00	0.08	0.04	0.13	0.00					
Loughborough Town Centre	0	5.16	7.03	0.47	0.16	1.36	3.58	5.01					
Nottingham City Centre	0	7.09	3.00	1.52	0.52	0.54	0.46	0.87					
Fosse Park, Leicester	0	0.32	1.61	0.58	0.17	0.62	1.88	0.70					
Tamworth	0	0.00	0.08	0.77	3.60	0.33	0.37	0.16					
Birmingham	0	0.17	0.16	0.48	0.55	0.06	0.06	0.00					
Catalogue, internet etc	0	3.16	2.75	4.64	3.01	1.55	3.40	2.25					
Other out of catchment	0	1.29	1.40	2.19	1.50	0.60	2.21	1.06					
Sub-total for outside catchment		30.22	24.35	35.21	19.54	13.98	25.35	20.32	168.97				
TOTAL		32.3	32.0	48.6	27.7	26.1	47.1	34.1	247.85				

MARKET SHARES FOR COMPARISON SPEND IN 2008

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total	Beyond Zones	TOTAL	Firspce	T/O psf
Population and Expenditure													
Population 2008		11,232	11,181	17,027	9,819	9,737	17,693	13,679	90,368				
Expenditure per capita in 2008 (in 2004 prices) £		3,299	3,288	3,285	3,244	3,081	3,059	2,864					
Total Expenditure 2008 £m		37.1	36.8	55.9	31.9	30.0	54.1	39.2	284.9				
Zone 1													
Others	1	3.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%					
Zone 2													
Others		0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%					
Zone 3													
Ashby-de-la-Zouch Town Centre	3	1.0%	4.5%	15.5%	13.0%	3.7%	2.9%	0.6%					
Others		0.0%	1.0%	3.0%	3.0%	0.0%	0.0%	0.0%					
Zone 4													
Others	4	0.0%	0.5%	0.6%	1.9%	1.5%	0.6%	0.7%					
Zone 5													
Ibstock Village Centre	5	0.0%	0.3%	0.2%	0.5%	7.2%	1.4%	0.6%					
Others		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%					
Zone 6													
Coalville Town Centre	6	1.5%	15.3%	7.0%	9.1%	26.0%	34.0%	32.6%					
Coalville Retail Warehouses	6	0.8%	1.5%	1.0%	2.0%	7.1%	6.7%	5.7%					
Others Zone 6	6	0.0%	0.0%	0.0%	0.0%	1.0%	0.2%	0.2%					
Zone 7													
Others	7	0.0%	0.3%	0.0%	0.0%	0.0%	0.4%	0.0%					
Sub-total for catchment area	0	6.3%	23.8%	27.6%	29.5%	46.5%	46.1%	40.4%					
Other Centres/Stores													
Burton-upon-Trent Town Centre	0	0.4%	1.2%	32.0%	25.0%	4.5%	2.2%	1.7%					
Derby City Centre	0	28.9%	3.8%	9.0%	2.8%	0.2%	0.9%	0.2%					
Leicester City Centre	0	1.2%	21.0%	9.5%	8.0%	29.3%	25.1%	28.3%					
Long Eaton Town Centre	0	9.9%	0.0%	0.0%	0.3%	0.2%	0.3%	0.0%					
Loughborough Town Centre	0	16.0%	22.0%	1.0%	0.6%	5.2%	7.6%	14.7%					
Nottingham City Centre	0	22.0%	9.4%	3.1%	1.9%	2.1%	1.0%	2.6%					
Fosse Park, Leicester	0	1.0%	5.0%	1.2%	0.6%	2.4%	4.0%	2.0%					
Tamworth	0	0.0%	0.3%	1.6%	13.0%	1.3%	0.8%	0.5%					
Birmingham	0	0.5%	0.5%	1.0%	2.0%	0.2%	0.1%	0.0%					
Catalogue, internet etc	0	9.8%	8.6%	9.5%	10.9%	6.0%	7.2%	6.6%					
Other out of catchment	0	4.0%	4.4%	4.5%	5.4%	2.3%	4.7%	3.1%					
Sub-total for outside catchment	0	93.7%	76.2%	72.4%	70.5%	53.6%	53.9%	59.6%					
TOTAL	0	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%					

PATTERN OF COMPARISON SPEND IN 2008

Zone 1													
Others	1	1.11	0.00	0.20	0.00	0.00	0.00	0.00					
Zone 2													
Others	2	0.00	0.18	0.00	0.00	0.00	0.00	0.00					
Zone 3													
Ashby de la Zouch Town Centre	3	0.37	1.65	8.67	4.14	1.10	1.56	0.23	17.74	2.00	19.74	80471	245
Others	3	0.00	0.37	1.68	0.96	0.00	0.00	0.00	3.00				
Zone 4													
Others	4	0.00	0.19	0.31	0.59	0.46	0.30	0.27	2.12				
Zone 5													
Ibstock Village Centre	5	0.00	0.10	0.09	0.17	2.16	0.75	0.24					
Others	5	0.00	0.00	0.00	0.00	0.00	0.00	0.00					
Zone 6													
Coalville Town Centre	6	0.56	5.62	3.91	2.90	7.80	18.40	12.77	51.97	7.00	58.97	204417	288
Coalville Retail Warehouses	6	0.30	0.55	0.56	0.64	2.13	3.63	2.23	10.03	2.00	12.03	65584	183
Other Zone 6	6	0.00	0.00	0.00	0.00	0.30	0.11	0.08					
Zone 7													
Others	7	0.00	0.09	0.02	0.00	0.00	0.22	0.00					
Sub-total for catchment area		2.33	8.76	15.44	9.40	13.95	24.97	15.82	90.68				
Other Centres/Stores													
Burton-upon-Trent Town Centre	0	0.14	0.45	17.90	7.96	1.35	1.20	0.67					
Derby City Centre	0	10.71	1.39	5.03	0.91	0.06	0.46	0.07					
Leicester City Centre	0	0.45	7.72	5.31	2.55	8.79	13.58	11.09	49.49				
Long Eaton Town Centre	0	3.68	0.00	0.00	0.09	0.05	0.15	0.00					
Loughborough Town Centre	0	5.93	8.09	0.54	0.19	1.56	4.11	5.76					
Nottingham City Centre	0	8.15	3.45	1.75	0.60	0.62	0.53	1.00					
Fosse Park, Leicester	0	0.37	1.85	0.67	0.19	0.72	2.17	0.80					
Tamworth	0	0.00	0.09	0.88	4.14	0.38	0.43	0.18					
Birmingham	0	0.19	0.18	0.55	0.64	0.07	0.07	0.00					
Catalogue, internet etc	0	3.64	3.16	5.33	3.46	1.79	3.91	2.59					
Other out of catchment	0	1.48	1.61	2.52	1.73	0.68	2.54	1.21					
Sub-total for outside catchment		34.74	28.00	40.48	22.46	16.07	29.15	23.37	194.27				
TOTAL		37.1	36.8	55.9	31.9	30.0	54.1	39.2	284.95				

MARKET SHARES FOR COMPARISON SPEND IN 2011

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total	Beyond Zones	TOTAL	Firspce	T/O psf
Population and Expenditure													
Population 2011		11,429	11,376	17,325	9,991	9,908	18,002	13,918	91,949				
Expenditure per capita in 2011 (in 2004 prices) £		3,722	3,709	3,705	3,660	3,476	3,451	3,231					
Total Expenditure 2011 £m		42.53	42.19	64.19	36.56	34.44	62.12	44.97	327.01				
Zone 1													
Others	1	3.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%					
Zone 2													
Others		0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%					
Zone 3													
Ashby-de-la-Zouch Town Centre	3	1.0%	4.5%	15.5%	13.0%	3.7%	2.9%	0.6%					
Others		0.0%	1.0%	3.0%	3.0%	0.0%	0.0%	0.0%					
Zone 4													
Others	4	0.0%	0.5%	0.6%	1.9%	1.5%	0.6%	0.7%					
Zone 5													
Ibstock Village Centre	5	0.0%	0.3%	0.2%	0.5%	7.2%	1.4%	0.6%					
Others		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%					
Zone 6													
Coalville Town Centre	6	1.5%	15.3%	7.0%	9.1%	26.0%	34.0%	32.6%					
Coalville Retail Warehouses	6	0.8%	1.5%	1.0%	2.0%	7.1%	6.7%	5.7%					
Others Zone 6	6	0.0%	0.0%	0.0%	0.0%	1.0%	0.2%	0.2%					
Zone 7													
Others	7	0.0%	0.3%	0.0%	0.0%	0.0%	0.4%	0.0%					
Sub-total for catchment area	0	6.3%	23.8%	27.6%	29.5%	46.5%	46.1%	40.4%					
Other Centres/Stores													
Burton-upon-Trent Town Centre	0	0.4%	1.2%	32.0%	25.0%	4.5%	2.2%	1.7%					
Derby City Centre	0	28.9%	3.8%	9.0%	2.8%	0.2%	0.9%	0.2%					
Leicester City Centre	0	1.2%	21.0%	9.5%	8.0%	29.3%	25.1%	28.3%					
Long Eaton Town Centre	0	9.9%	0.0%	0.0%	0.3%	0.2%	0.3%	0.0%					
Loughborough Town Centre	0	16.0%	22.0%	1.0%	0.6%	5.2%	7.6%	14.7%					
Nottingham City Centre	0	22.0%	9.4%	3.1%	1.9%	2.1%	1.0%	2.6%					
Fosse Park, Leicester	0	1.0%	5.0%	1.2%	0.6%	2.4%	4.0%	2.0%					
Tamworth	0	0.0%	0.3%	1.6%	13.0%	1.3%	0.8%	0.5%					
Birmingham	0	0.5%	0.5%	1.0%	2.0%	0.2%	0.1%	0.0%					
Catalogue, internet etc	0	9.8%	8.6%	9.5%	10.9%	6.0%	7.2%	6.6%					
Other out of catchment	0	4.0%	4.4%	4.5%	5.4%	2.3%	4.7%	3.1%					
Sub-total for outside catchment	0	93.7%	76.2%	72.4%	70.5%	53.6%	53.9%	59.6%					
TOTAL	0	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%					

PATTERN OF COMPARISON SPEND IN 2011

Zone 1													
Others	1	1.28	0.00	0.23	0.00	0.00	0.00	0.00					
Zone 2													
Others	2	0.00	0.21	0.00	0.00	0.00	0.00	0.00					
Zone 3													
Ashby de la Zouch Town Centre	3	0.43	1.90	9.95	4.75	1.27	1.80	0.27	20.36	2.00	22.36	80471	278
Others	3	0.00	0.42	1.93	1.10	0.00	0.00	0.00	3.44				
Zone 4													
Others	4	0.00	0.22	0.36	0.68	0.52	0.34	0.31	2.43				
Zone 5													
Ibstock Village Centre	5	0.00	0.11	0.10	0.20	2.48	0.86	0.27					
Others	5	0.00	0.00	0.00	0.00	0.00	0.00	0.00					
Zone 6													
Coalville Town Centre	6	0.64	6.46	4.49	3.33	8.95	21.12	14.66	59.65	7.00	66.65	204417	326
Coalville Retail Warehouses	6	0.34	0.63	0.64	0.73	2.44	4.16	2.56	11.52	2.00	13.52	65584	206
Other Zone 6	6	0.00	0.00	0.00	0.00	0.34	0.12	0.09					
Zone 7													
Others	7	0.00	0.11	0.02	0.00	0.00	0.25	0.00					
Sub-total for catchment area		2.68	10.06	17.73	10.79	16.01	28.66	18.16	104.08				
Other Centres/Stores													
Burton-upon-Trent Town Centre	0	0.16	0.51	20.54	9.14	1.55	1.38	0.77					
Derby City Centre	0	12.29	1.60	5.78	1.04	0.07	0.53	0.08					
Leicester City Centre	0	0.51	8.86	6.10	2.93	10.09	15.59	12.73	56.80				
Long Eaton Town Centre	0	4.22	0.00	0.00	0.11	0.05	0.18	0.00					
Loughborough Town Centre	0	6.81	9.28	0.62	0.22	1.79	4.72	6.61					
Nottingham City Centre	0	9.36	3.96	2.01	0.69	0.71	0.61	1.15					
Fosse Park, Leicester	0	0.43	2.12	0.77	0.22	0.82	2.49	0.92					
Tamworth	0	0.00	0.11	1.01	4.75	0.44	0.49	0.21					
Birmingham	0	0.22	0.21	0.63	0.73	0.08	0.08	0.00					
Catalogue, internet etc	0	4.18	3.63	6.12	3.97	2.05	4.48	2.97					
Other out of catchment	0	1.70	1.85	2.89	1.98	0.79	2.92	1.39					
Sub-total for outside catchment		39.88	32.13	46.46	25.78	18.44	33.45	26.82	222.97				
TOTAL		42.6	42.2	64.2	36.6	34.5	62.1	45.0	327.05				

MARKET SHARES FOR COMPARISON SPEND IN 2016

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total	Beyond Zones	TOTAL	Firspce	T/O psf
Population and Expenditure													
Population 2016		11,786	11,733	17,867	10,304	10,218	18,566	14,354	94,827				
Expenditure per capita in 2016 (in 2004 prices) £		4,596	4,580	4,576	4,519	4,292	4,261	3,990					
Total Expenditure 2016 £m		54.17	53.73	81.75	46.57	43.86	79.12	57.27	416.47				
Zone 1													
Others	1	3.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%					
Zone 2													
Others		0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%					
Zone 3													
Ashby-de-la-Zouch Town Centre	3	1.0%	4.5%	15.5%	13.0%	3.7%	2.9%	0.6%					
Others		0.0%	1.0%	3.0%	3.0%	0.0%	0.0%	0.0%					
Zone 4													
Others	4	0.0%	0.5%	0.6%	1.9%	1.5%	0.6%	0.7%					
Zone 5													
Ibstock Village Centre	5	0.0%	0.3%	0.2%	0.5%	7.2%	1.4%	0.6%					
Others		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%					
Zone 6													
Coalville Town Centre	6	1.5%	15.3%	7.0%	9.1%	26.0%	34.0%	32.6%					
Coalville Retail Warehouses	6	0.8%	1.5%	1.0%	2.0%	7.1%	6.7%	5.7%					
Others Zone 6	6	0.0%	0.0%	0.0%	0.0%	1.0%	0.2%	0.2%					
Zone 7													
Others	7	0.0%	0.3%	0.0%	0.0%	0.0%	0.4%	0.0%					
Sub-total for catchment area	0	6.3%	23.8%	27.6%	29.5%	46.5%	46.1%	40.4%					
Other Centres/Stores													
Burton-upon-Trent Town Centre	0	0.4%	1.2%	32.0%	25.0%	4.5%	2.2%	1.7%					
Derby City Centre	0	28.9%	3.8%	9.0%	2.8%	0.2%	0.9%	0.2%					
Leicester City Centre	0	1.2%	21.0%	9.5%	8.0%	29.3%	25.1%	28.3%					
Long Eaton Town Centre	0	9.9%	0.0%	0.0%	0.3%	0.2%	0.3%	0.0%					
Loughborough Town Centre	0	16.0%	22.0%	1.0%	0.6%	5.2%	7.6%	14.7%					
Nottingham City Centre	0	22.0%	9.4%	3.1%	1.9%	2.1%	1.0%	2.6%					
Fosse Park, Leicester	0	1.0%	5.0%	1.2%	0.6%	2.4%	4.0%	2.0%					
Tamworth	0	0.0%	0.3%	1.6%	13.0%	1.3%	0.8%	0.5%					
Birmingham	0	0.5%	0.5%	1.0%	2.0%	0.2%	0.1%	0.0%					
Catalogue, internet etc	0	9.8%	8.6%	9.5%	10.9%	6.0%	7.2%	6.6%					
Other out of catchment	0	4.0%	4.4%	4.5%	5.4%	2.3%	4.7%	3.1%					
Sub-total for outside catchment	0	93.7%	76.2%	72.4%	70.5%	53.6%	53.9%	59.6%					
TOTAL	0	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%					

PATTERN OF COMPARISON SPEND IN 2016

Zone 1													
Others	1	1.63	0.00	0.29	0.00	0.00	0.00	0.00					
Zone 2													
Others	2	0.00	0.27	0.00	0.00	0.00	0.00	0.00					
Zone 3													
Ashby de la Zouch Town Centre	3	0.54	2.42	12.67	6.05	1.61	2.29	0.34	25.92	2.00	27.92	80471	347
Others	3	0.00	0.54	2.45	1.40	0.00	0.00	0.00	4.39				
Zone 4													
Others	4	0.00	0.28	0.46	0.87	0.67	0.44	0.39	3.10				
Zone 5													
Ibstock Village Centre	5	0.00	0.14	0.13	0.26	3.15	1.10	0.35					
Others	5	0.00	0.00	0.00	0.00	0.00	0.00	0.00					
Zone 6													
Coalville Town Centre	6	0.81	8.22	5.72	4.24	11.40	26.90	18.67	75.97	7.00	82.97	204417	406
Coalville Retail Warehouses	6	0.43	0.81	0.82	0.93	3.11	5.30	3.26	14.67	2.00	16.67	65584	254
Other Zone 6	6	0.00	0.00	0.00	0.00	0.44	0.16	0.11					
Zone 7													
Others	7	0.00	0.14	0.03	0.00	0.00	0.32	0.00					
Sub-total for catchment area		3.41	12.81	22.58	13.74	20.39	36.50	23.13	132.55				
Other Centres/Stores													
Burton-upon-Trent Town Centre	0	0.21	0.65	26.16	11.64	1.97	1.76	0.98					
Derby City Centre	0	15.66	2.04	7.36	1.32	0.09	0.68	0.10					
Leicester City Centre	0	0.65	11.28	7.77	3.73	12.84	19.85	16.21	72.34				
Long Eaton Town Centre	0	5.38	0.00	0.00	0.14	0.07	0.22	0.00					
Loughborough Town Centre	0	8.67	11.82	0.79	0.28	2.28	6.01	8.41					
Nottingham City Centre	0	11.92	5.05	2.56	0.88	0.91	0.77	1.47					
Fosse Park, Leicester	0	0.54	2.70	0.98	0.28	1.05	3.17	1.17					
Tamworth	0	0.00	0.14	1.29	6.05	0.56	0.63	0.26					
Birmingham	0	0.28	0.27	0.81	0.93	0.10	0.10	0.00					
Catalogue, internet etc	0	5.32	4.62	7.79	5.06	2.61	5.71	3.78					
Other out of catchment	0	2.17	2.35	3.68	2.52	1.00	3.71	1.77					
Sub-total for outside catchment		50.79	40.92	59.18	32.83	23.49	42.61	34.15	284.0				
TOTAL		54.2	53.7	81.8	46.6	43.9	79.1	57.3	416.5				

MARKET SHARES FOR COMPARISON SPEND IN 2021

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total	Beyond Zones	TOTAL	Firspce	T/O psf
Population and Expenditure													
Population 2021		12,117	12,062	18,369	10,593	10,505	19,087	14,757	97,492				
Expenditure per capita in 2021 (in 2004 prices) £		5,539	5,520	5,515	5,447	5,173	5,136	4,809					
Total Expenditure 2021 £m		67.12	66.58	101.30	57.70	54.34	98.03	70.97	516.04				
Zone 1													
Others	1	3.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%					
Zone 2													
Others		0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%					
Zone 3													
Ashby-de-la-Zouch Town Centre	3	1.0%	4.5%	15.5%	13.0%	3.7%	2.9%	0.6%					
Others		0.0%	1.0%	3.0%	3.0%	0.0%	0.0%	0.0%					
Zone 4													
Others	4	0.0%	0.5%	0.6%	1.9%	1.5%	0.6%	0.7%					
Zone 5													
Ibstock Village Centre	5	0.0%	0.3%	0.2%	0.5%	7.2%	1.4%	0.6%					
Others		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%					
Zone 6													
Coalville Town Centre	6	1.5%	15.3%	7.0%	9.1%	26.0%	34.0%	32.6%					
Coalville Retail Warehouses	6	0.8%	1.5%	1.0%	2.0%	7.1%	6.7%	5.7%					
Others Zone 6	6	0.0%	0.0%	0.0%	0.0%	1.0%	0.2%	0.2%					
Zone 7													
Others	7	0.0%	0.3%	0.0%	0.0%	0.0%	0.4%	0.0%					
Sub-total for catchment area	0	6.3%	23.8%	27.6%	29.5%	46.5%	46.1%	40.4%					
Other Centres/Stores													
Burton-upon-Trent Town Centre	0	0.4%	1.2%	32.0%	25.0%	4.5%	2.2%	1.7%					
Derby City Centre	0	28.9%	3.8%	9.0%	2.8%	0.2%	0.9%	0.2%					
Leicester City Centre	0	1.2%	21.0%	9.5%	8.0%	29.3%	25.1%	28.3%					
Long Eaton Town Centre	0	9.9%	0.0%	0.0%	0.3%	0.2%	0.3%	0.0%					
Loughborough Town Centre	0	16.0%	22.0%	1.0%	0.6%	5.2%	7.6%	14.7%					
Nottingham City Centre	0	22.0%	9.4%	3.1%	1.9%	2.1%	1.0%	2.6%					
Fosse Park, Leicester	0	1.0%	5.0%	1.2%	0.6%	2.4%	4.0%	2.0%					
Tamworth	0	0.0%	0.3%	1.6%	13.0%	1.3%	0.8%	0.5%					
Birmingham	0	0.5%	0.5%	1.0%	2.0%	0.2%	0.1%	0.0%					
Catalogue, internet etc	0	9.8%	8.6%	9.5%	10.9%	6.0%	7.2%	6.6%					
Other out of catchment	0	4.0%	4.4%	4.5%	5.4%	2.3%	4.7%	3.1%					
Sub-total for outside catchment	0	93.7%	76.2%	72.4%	70.5%	53.6%	53.9%	59.6%					
TOTAL	0	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%					

PATTERN OF COMPARISON SPEND IN 2021

Zone 1													
Others	1	2.01	0.00	0.36	0.00	0.00	0.00	0.00					
Zone 2													
Others	2	0.00	0.33	0.00	0.00	0.00	0.00	0.00					
Zone 3													
Ashby de la Zouch Town Centre	3	0.67	3.00	15.70	7.50	2.00	2.83	0.42	32.12	2.00	34.12	80471	424
Others	3	0.00	0.67	3.04	1.73	0.00	0.00	0.00	5.44				
Zone 4													
Others	4	0.00	0.34	0.57	1.07	0.83	0.54	0.48	3.84				
Zone 5													
Ibstock Village Centre	5	0.00	0.18	0.16	0.32	3.91	1.36	0.43					
Others	5	0.00	0.00	0.00	0.00	0.00	0.00	0.00					
Zone 6													
Coalville Town Centre	6	1.01	10.19	7.09	5.25	14.13	33.33	23.13	94.13	7.00	101.13	204417	495
Coalville Retail Warehouses	6	0.54	1.00	1.01	1.15	3.86	6.57	4.05	18.17	2.00	20.17	65584	308
Other Zone 6	6	0.00	0.00	0.00	0.00	0.54	0.20	0.14					
Zone 7													
Others	7	0.00	0.17	0.04	0.00	0.00	0.40	0.00					
Sub-total for catchment area		4.23	15.87	27.97	17.03	25.26	45.23	28.66	164.25				
Other Centres/Stores													
Burton-upon-Trent Town Centre	0	0.26	0.81	32.42	14.43	2.45	2.17	1.21					
Derby City Centre	0	19.40	2.52	9.12	1.64	0.11	0.84	0.12					
Leicester City Centre	0	0.81	13.98	9.62	4.62	15.92	24.60	20.09	89.63				
Long Eaton Town Centre	0	6.66	0.00	0.00	0.17	0.08	0.28	0.00					
Loughborough Town Centre	0	10.74	14.65	0.98	0.34	2.83	7.45	10.43					
Nottingham City Centre	0	14.77	6.26	3.17	1.09	1.12	0.96	1.82					
Fosse Park, Leicester	0	0.67	3.35	1.21	0.35	1.30	3.92	1.45					
Tamworth	0	0.00	0.17	1.60	7.50	0.70	0.78	0.33					
Birmingham	0	0.34	0.33	1.00	1.15	0.13	0.12	0.00					
Catalogue, internet etc	0	6.59	5.72	9.65	6.27	3.24	7.08	4.68					
Other out of catchment	0	2.68	2.91	4.56	3.13	1.24	4.60	2.20					
Sub-total for outside catchment		62.93	50.71	73.32	40.68	29.10	52.79	42.32	351.9				
TOTAL		67.2	66.6	101.3	57.7	54.4	98.0	71.0	516.1				

MARKET SHARES FOR COMPARISON SPEND IN 2026

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total	Beyond Zones	TOTAL	Flrspce	T/O psf
Population and Expenditure													
Population 2026		12,476	12,419	18,913	10,907	10,816	19,652	15,194	100,378				
Expenditure per capita in 2026 (in 2004 prices) £		6,675	6,651	6,645	6,564	6,234	6,189	5,795					
Total Expenditure 2026 £m		83.28	82.61	125.68	71.59	67.42	121.62	88.04	640.24				

Zone 1													
Others	1	3.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%					
Zone 2													
Others		0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%					
Zone 3													
Ashby-de-la-Zouch Town Centre	3	1.0%	4.5%	15.5%	13.0%	3.7%	2.9%	0.6%					
Others		0.0%	1.0%	3.0%	3.0%	0.0%	0.0%	0.0%					
Zone 4													
Others	4	0.0%	0.5%	0.6%	1.9%	1.5%	0.6%	0.7%					
Zone 5													
Ibstock Village Centre	5	0.0%	0.3%	0.2%	0.5%	7.2%	1.4%	0.6%					
Others		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%					
Zone 6													
Coalville Town Centre	6	1.5%	15.3%	7.0%	9.1%	26.0%	34.0%	32.6%					
Coalville Retail Warehouses	6	0.8%	1.5%	1.0%	2.0%	7.1%	6.7%	5.7%					
Others Zone 6	6	0.0%	0.0%	0.0%	0.0%	1.0%	0.2%	0.2%					
Zone 7													
Others	7	0.0%	0.3%	0.0%	0.0%	0.0%	0.4%	0.0%					
Sub-total for catchment area	0	6.3%	23.8%	27.6%	29.5%	46.5%	46.1%	40.4%					
Other Centres/Stores													
Burton-upon-Trent Town Centre	0	0.4%	1.2%	32.0%	25.0%	4.5%	2.2%	1.7%					
Derby City Centre	0	28.9%	3.8%	9.0%	2.8%	0.2%	0.9%	0.2%					
Leicester City Centre	0	1.2%	21.0%	9.5%	8.0%	29.3%	25.1%	28.3%					
Long Eaton Town Centre	0	9.9%	0.0%	0.0%	0.3%	0.2%	0.3%	0.0%					
Loughborough Town Centre	0	16.0%	22.0%	1.0%	0.6%	5.2%	7.6%	14.7%					
Nottingham City Centre	0	22.0%	9.4%	3.1%	1.9%	2.1%	1.0%	2.6%					
Fosse Park, Leicester	0	1.0%	5.0%	1.2%	0.6%	2.4%	4.0%	2.0%					
Tamworth	0	0.0%	0.3%	1.6%	13.0%	1.3%	0.8%	0.5%					
Birmingham	0	0.5%	0.5%	1.0%	2.0%	0.2%	0.1%	0.0%					
Catalogue, internet etc	0	9.8%	8.6%	9.5%	10.9%	6.0%	7.2%	6.6%					
Other out of catchment	0	4.0%	4.4%	4.5%	5.4%	2.3%	4.7%	3.1%					
Sub-total for outside catchment	0	93.7%	76.2%	72.4%	70.5%	53.6%	53.9%	59.6%					
TOTAL	0	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%					

PATTERN OF COMPARISON SPEND IN 2026

Zone 1													
Others	1	2.50	0.00	0.45	0.00	0.00	0.00	0.00					
Zone 2													
Others	2	0.00	0.41	0.00	0.00	0.00	0.00	0.00					
Zone 3													
Ashby de la Zouch Town Centre	3	0.83	3.72	19.48	9.31	2.48	3.51	0.52	39.85	2.00	41.85	80471	520
Others	3	0.00	0.83	3.77	2.15	0.00	0.00	0.00	6.74				
Zone 4													
Others	4	0.00	0.43	0.70	1.33	1.03	0.67	0.60	4.76				
Zone 5													
Ibstock Village Centre	5	0.00	0.22	0.20	0.39	4.85	1.69	0.53					
Others	5	0.00	0.00	0.00	0.00	0.00	0.00	0.00					
Zone 6													
Coalville Town Centre	6	1.25	12.64	8.80	6.51	17.53	41.35	28.70	116.78	7.00	123.78	204417	606
Coalville Retail Warehouses	6	0.67	1.24	1.26	1.43	4.79	8.15	5.02	22.55	2.00	24.55	65584	374
Other Zone 6	6	0.00	0.00	0.00	0.00	0.67	0.24	0.18					
Zone 7													
Others	7	0.00	0.21	0.04	0.00	0.00	0.49	0.00					
Sub-total for catchment area		5.25	19.69	34.71	21.12	31.34	56.11	35.55	203.78				
Other Centres/Stores													
Burton-upon-Trent Town Centre	0	0.32	1.00	40.22	17.90	3.03	2.70	1.51					
Derby City Centre	0	24.07	3.13	11.31	2.04	0.14	1.04	0.15					
Leicester City Centre	0	1.00	17.35	11.94	5.73	19.75	30.52	24.92	111.20				
Long Eaton Town Centre	0	8.27	0.00	0.00	0.21	0.10	0.34	0.00					
Loughborough Town Centre	0	13.32	18.17	1.21	0.42	3.51	9.24	12.93					
Nottingham City Centre	0	18.32	7.76	3.93	1.36	1.39	1.19	2.26					
Fosse Park, Leicester	0	0.83	4.16	1.50	0.43	1.61	4.87	1.80					
Tamworth	0	0.00	0.21	1.99	9.31	0.86	0.96	0.41					
Birmingham	0	0.43	0.41	1.24	1.43	0.16	0.15	0.00					
Catalogue, internet etc	0	8.17	7.10	11.98	7.78	4.02	8.78	5.81					
Other out of catchment	0	3.33	3.61	5.66	3.88	1.54	5.71	2.73					
Sub-total for outside catchment		78.07	62.91	90.97	50.47	36.11	65.50	52.51	436.5				
TOTAL		83.3	82.6	125.7	71.6	67.5	121.6	88.1	640.3				

Summary of Capacity, for Comparison Goods Base Scenario A
Static retention @ 31.83%

	2004	2008	2011	2016	2021	2026	Change 2004-2008	Change 2008-11	Change 2011-16	Change 2016-21	Change 2021-26	Change 2004-26
Total Population	88,260	90,368	91,949	94,827	97,492	100,378	2,108	1,581	2,878	2,665	2,886	12,118
Total Expenditure £m	247.8	284.9	327.0	416.5	516.0	640.2	37.1	42.1	89.5	99.6	124.2	392.4
Retained Expenditure £m	78.9	90.7	104.1	132.6	164.2	203.8	11.8	13.4	28.5	31.7	39.5	124.9
Retained Expenditure %	31.83	31.83	31.83	31.83	31.83	31.83						
Leakage £m	168.9	194.2	222.9	283.9	351.8	436.5	25.3	28.7	61.0	67.9	84.7	267.5
Inflow £m												
Total Turnover of Comparison Stores in OCA £m	78.9	90.7	104.1	132.6	164.2	203.8	11.8	13.4	28.5	31.7	39.5	124.9
Initial Surplus £m/annum (Growth in Retained Expenditure)							11.8	13.4	28.5	31.7	39.5	124.9
Claims on Expenditure												
Existing Traders £m	0	6.5	11.7	21.2	31.6	43.1	6.5	5.2	9.4	10.4	11.5	43.1
Commitments	0	8.0	8.5	9.4	10.3	11.4	8.0	0.5	0.9	1.0	1.1	11.4
Growth in e-retail	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Impact on capacity £m	0.0	14.5	20.2	30.5	41.9	54.5	14.5	5.7	10.3	11.4	12.6	54.5
SUMMARY							2004-2008	2008-11	2011-16	2016-21	2021-26	2004-26
Initial surplus £m							11.8	13.4	28.5	31.7	39.5	124.9
Claims on capacity £m							14.5	5.7	10.3	11.4	12.6	54.5
RESIDUAL £m							-2.7	7.7	18.2	20.3	27.0	70.4
Turnover per sq m (Low Scenario)							2,691	2,691	2,691	2,691	2,691	2,691
Floorspace Requirement sq m (Low Scenario)							-1,001	2,854	6,749	7,546	10,017	26,165
Turnover per sq m (High Scenario)							4,500	4,500	4,500	4,500	4,500	4,500
Floorspace Requirement sq m (High Scenario)							-599	1,707	4,036	4,512	5,990	15,647

**Summary of Capacity, for Comparison Goods Base Scenario B
INCREASED RETENTION**

	2004	2008	2011	2016	2021	2026	Change 2004-2008	Change 2008-11	Change 2011-16	Change 2016-21	Change 2021-26	Change 2004-26
Total Population	88,260	90,368	91,949	94,827	97,492	100,378	2,108	1,581	2,878	2,665	2,886	12,118
Total Expenditure £m	247.8	284.9	327.0	416.5	516.0	640.2	37.1	42.1	89.5	99.6	124.2	392.4
Retained Expenditure £m	78.9	94.0	111.2	149.9	196.1	256.1	15.1	17.2	38.7	46.2	60.0	177.2
Retained Expenditure %	32	33	34	36	38	40						
Leakage £m	168.9	190.9	215.8	266.5	319.9	384.1	22.0	24.9	50.7	53.4	64.2	215.2
Inflow £m												
Total Turnover of Comparison Stores in OCA £m	78.9	94.0	111.2	149.9	196.1	256.1	15.1	17.2	38.7	46.2	60.0	177.2
Initial Surplus £m/annum (Growth in Retained Expenditure)							15.1	17.2	38.7	46.2	60.0	177.2
Claims on Expenditure												
Existing Traders £m	0	6.5	11.7	21.2	31.6	43.1	6.5	5.2	9.4	10.4	11.5	43.1
Commitments	0	8.0	8.5	9.4	10.3	11.4	8.0	0.5	0.9	1.0	1.1	11.4
Growth in e-retail	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Impact on capacity £m	0.0	14.5	20.2	30.5	41.9	54.5	14.5	5.7	10.3	11.4	12.6	54.5
SUMMARY							2004-2008	2008-11	2011-16	2016-21	2021-26	2004-26
Initial surplus £m							15.1	17.2	38.7	46.2	60.0	177.2
Claims on capacity £m							14.5	5.7	10.3	11.4	12.6	54.5
RESIDUAL £m							0.6	11.4	28.4	34.8	47.4	122.7
Turnover per sq m (Low Scenario)							2,691	2,691	2,691	2,691	2,691	2,691
Floorspace Requirement sq m (Low Scenario)							240	4,253	10,566	12,925	17,624	45,608
Turnover per sq m (High Scenario)							4,500	4,500	4,500	4,500	4,500	4,500
Floorspace Requirement sq m (High Scenario)							143	2,543	6,319	7,729	10,539	27,274