North West Leicestershire District Council

North West Leicestershire Retail Study
2015 Capacity Update

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1 INTRODUCTION

1.1 North West Leicestershire District Council (NWLDC) has commissioned Peter Brett Associates (PBA) to provide an update to quantitative retail capacity forecasts for the District. The Council wishes to refresh its retail capacity evidence base, in order to bring the study up to date with current forecasts of population growth, expenditure growth, and other key inputs which can affect the need for future retail floorspace, such as online shopping and other 'special forms of trading'.

1.2 This report updates the data presented at Appendix 2 of the North West Leicestershire Retail Study Update 2012, completed by PBA in March 2013 (hereafter referred to as the 2012 RSU). Our revised assessment of retail floorspace capacity should be read alongside the findings of the previous study. The remit of this study extends solely to updating the quantitative retail capacity forecasts which the 2012 RSU identified, and we have not been asked to update any of the other components of the 2012 study (for example, 'health checks' of centres in the District). The findings of both studies should thus be considered together.

1.3 No new household telephone survey of shopping patterns has been undertaken in support of this update. We therefore continue to use the findings of the household telephone survey conducted by NEMS Market Research during October 2012 as the basis of our updated capacity assessment. Any new retail developments which have taken place subsequent to the completion of the telephone survey are treated as 'commitments' for the purposes of this update.

1.4 The remainder of this report is structured as follows:

- **Section 2** we provide a summary of the key findings of the 2012 RSU;
- **Section 3** discusses the adjustments we have made to the key data inputs used for forecasting retail floorspace capacity for the purposes of this update;
- **Section 4** sets out the updated forecasts for new comparison (non-food) and convenience (food) floorspace; and
- **Section 5** sets out a summary of our findings and our recommendations.

1.5 Our full data tables are contained at Appendix A.

2 KEY FINDINGS FROM THE PREVIOUS STUDY

Introduction

2.1 In this section we summarise the findings of the North West Leicestershire Retail Study Update (2012 RSU) to provide context for the updated capacity forecasts which we set out in Section 4 of this report.

Study Area

2.2 In assessing the need for retail floorspace, the first step is to define a suitable study area within which to assess shopping and leisure patterns of residents. The study area which forms the basis of our assessment is unchanged from that used in the 2005 and 2007 retail studies and the more recent 2012 RSU. The boundaries of the study area correlate to the administrative boundaries of North West Leicestershire District, reflecting the fact that the District is relatively self-contained in terms of the role and function of the main town centres. In order to get an accurate picture of shopping patterns, the study area is divided into seven survey zones, which have been principally defined by ward boundaries[1]. For continuity, the boundaries and numbering of the survey zones is also unchanged from that used in the previous studies.

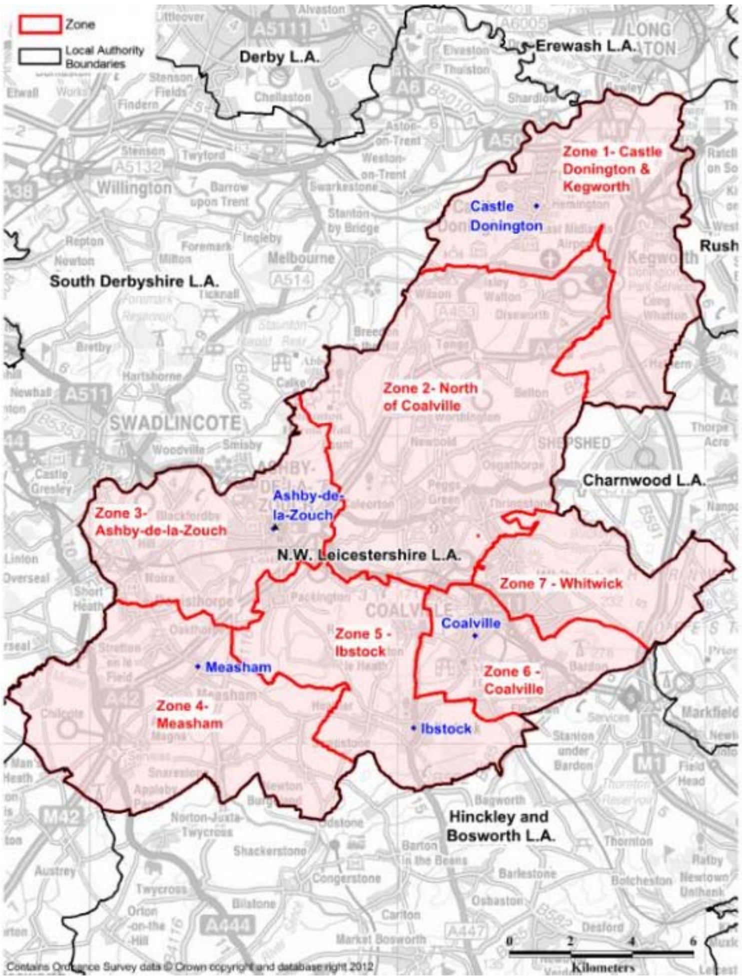
2.3 In Table 2.1 below we provide details the individual zones within the study area, identifying the main centres within each zone. A map of the study area is shown at Figure 2.1.

Table 2.1 Study Area Zones

Zone	Zone name	Main Centres
1	Castle Donington & Kegworth	Castle Donington; Kegworth
2	North of Coalville	Belton; Diseworth; Breedon-on-the-Hill
3	Ashby	Ashby-de-la-Zouch; Moira; Blackfordby
4	Measham	Measham; Donisthorpe; Appleby Magna; Oakthorpe
5	Ibstock	Ibstock; Packington; Ravenstone; Heather
6	Coalville	Coalville; Ellistown
7	Whitwick	Whitwick; Coalville (Greenhill)

[1] District Council ward boundaries as of February 2015.

Figure 2.1 Study Area Map



Health Check Findings

2.4 The 2012 RSU carried out an assessment of the vitality and viability of the main centres in the District, namely Coalville, Ashby-de-la-Zouch, Castle Donington, Ibstock and Measham. The results showed that Coalville was under-performing against a number of health check indicators including high vacancy rates and a lack of variety in its retail offer, particularly in the important clothing and footwear sub-sector. The previous study showed that Coalville was mainly acting as a ‘service’ destination and not a ‘shopping’ destination.

2.5 Conversely, Ashby was shown to be performing well, with a low vacancy rate, a well maintained town centre and a good variety of retailers with a mix of national multiples and specialist independents. However, the study did find that the leisure offer of Ashby Town Centre could be enhanced, particularly in terms of restaurant and café provision.

2.6 Of the smaller centres, the 2012 RSU concluded that whilst Castle Donington was considered to be performing adequately, there was a need to enhance the vitality and viability of Ibstock, where facilities were limited and focused on hot food takeaways and other lower grade uses. Measham was also found to be performing adequately, though it was lacking in terms of foodstore provision.

Comparison Goods Shopping Patterns

2.7 In this section we provide a brief summary of the findings of the shopping patterns identified by the household telephone survey that was undertaken to support the 2012 RSU. We consider comparison goods shopping which relates to non-food goods and convenience goods shopping which relates to food goods. A full discussion of the findings is set out at Section 6 of the 2012 RSU, which also provides details of the survey methodology.

2.8 By way of recap, the survey results identified that 36.5 per cent of total available comparison (non-food) expenditure was retained by destinations within the study area (i.e. within the boundaries of the District). This represented an increase on the retention rate identified in the previous 2005 Study (31.8 per cent). In the 2012 RSU we noted that this improved retention rate was surprising given the improvements to the retail offer of centres surrounding the District. However, we noted that that a *"key aim of the Council over the course of the Core Strategy period should be securing further improvements to this retention rate"* and we continue to hold this view.

2.9 The household survey results identified that the following destinations within the study area accounted for the greatest proportion of comparison goods spending:

- Coalville Town Centre (17 per cent of available expenditure)
- Ashby Town Centre (7 per cent)
- Tesco, Ashby (5 per cent)
- Ibstock (2 per cent)
- Retail Warehousing, Dents Road, Ashby (2 per cent)
- Morrisons, Coalville (1 per cent)

2.10 The household survey results confirmed that Coalville and Ashby Town Centres were the dominant comparison shopping destinations within the study area. Coalville attracted £43.60m of trade from the study area, with Ashby drawing a further £17.01m.

2.11 The remaining 63.5 per cent of comparison goods expenditure 'leaked' to destinations outside the District, chiefly to the following locations:

- Leicester City Centre (9 per cent of available expenditure)
- Loughborough Town Centre (incl. foodstores) (8 per cent)
- Fosse Park, Leicester (incl. foodstores) (7 per cent)
- Loughborough – retail warehouses/non-town centre stores (7 per cent)
- Burton-on-Trent Town Centre (5 per cent)
- Derby City Centre (4 per cent)
- Nottingham City Centre (4 per cent)

2.12 Limited expenditure leakage also took place from the District to other centres including Swadlincote, Tamworth and Long Eaton.

2.13 The 2012 RSU noted that expenditure leakage was to be expected when parts of the study area are in close proximity to higher order and larger centres. The household survey results showed that despite Leicester being the most popular comparison goods shopping destination outside the study area, it had lost some of its market share compared with the previous household survey results. Conversely, the survey results showed that Loughborough had *'increased its attractiveness as a shopping destination since the previous household survey'*.

2.14 The 2012 RSU carried out a retention analysis at a zonal level to determine how well different parts of the study area were performing. The study found that the zones with the highest levels of comparison goods expenditure retention were Zones 5 (Ibstock), 6 (Coalville) and 3 (Ashby) with retention rates of 49 per cent, 44 per cent and 43 per cent respectively. The other four zones were found to have retention rates of less than 40 per cent. The study concluded that, overall, it was apparent that many of the comparison goods shopping needs of residents are not being met by existing facilities within the study area.

Convenience Goods Shopping Patterns

2.15 The household telephone survey identified that 75.8 per cent of total available expenditure on convenience (food) goods is retained by centres and stores within the study area. The higher retention rate reflects the fact that convenience goods shopping is generally a more localised activity, meaning that people are less willing to travel as far to undertake their food shopping trips as they are their non-food shopping. It also indicates that there is a good network of food shopping facilities within the study area.

2.16 Three foodstores in the study area attracted more than 5 per cent of total available convenience goods expenditure from residents of the study area and these were:

- Morrisons, Whitwick Road, Coalville (22 per cent of total expenditure)
- Tesco, Resolution Road, Ashby (19 per cent)
- Aldi, Thornborough Road, Coalville (8 per cent)

2.17 A further seven foodstores attract between 1 and 3 per cent of total available convenience goods expenditure from residents including the Asda store in Coalville and the Co-Operative stores in Ashby, Castle Donington (Station Road) and Ibstock.

2.18 There is some leakage of convenience goods expenditure from the study area to foodstores in Swadlincote, Long Eaton and Loughborough; however this is relatively limited when considered as a proportion of total convenience goods expenditure. The household survey found that parts of the District benefit from high levels of expenditure retention. Zone 5 (Ibstock) and Zone 6 (Coalville) each recorded retention rates of 93 per cent. Other zones also achieving high retention rates included Zones 2 (north of Coalville) and 7 (Whitwick) who benefit from retention rates of more than 80 per cent.

2.19 Zones 3 (Ashby), 4 (Measham) and 1 (Castle Donington & Kegworth) achieved retention rates of 73 per cent, 53 per cent and 35 per cent respectively. Overall the 2012 RSU concluded that *"the zonal expenditure rates represent a generally positive performance and indicate that in many parts of the study area the food shopping needs of residents are being adequately met*". However, the 2012 RSU did note that the Morrisons in Coalville and Tesco in Ashby held dominant market shares in those areas which suggested that consumer choice may be restricted.

The Need for New Retail Floorspace

2.20 The 2012 RSU identified the following comparison goods requirements over the period to 2031. Four different scenarios were tested:

- Scenario 1: a static expenditure retention scenario which assumed that current patterns of comparison goods shopping remained unchanged throughout the study period.
- Scenario 2: an improved retention scenario which assumed that the expenditure retention rate of 37 per cent would rise to 45 per cent in 2021 if existing commitments (and specifically the redevelopment of the Belvoir Shopping Centre in Coalville) were implemented.
- Scenario 3: a static retention scenario which assumed that the major planning commitments in Coalville (i.e. the Belvoir Shopping Centre redevelopment and the Tesco foodstore scheme) would not come forward.
- Scenario 4: the fourth scenario removed the commitments described above, but planned for an increasing level of expenditure retention over the course of the study period (i.e. it assumed that other commitments would come forward to take the place of the Coalville schemes).

2.21 The results of these scenarios are summarised in Table 2.2 below.

Table 2.2 Summary of Comparison Floorsapce Needs (2012 RSU)

	2013- 2016 (sq.m net)	2016-2021 (sq.m net)	2021- 2026 (sq.m net)	2026-2031 (sq.m net)
Scenario 1	-9,900	1,000	2,000	2,300
Scenario 2	-9,900	6,500	3,000	3,300
Scenario 3	1,300	1,800	2,700	3,100
Scenario 4	1,300	7,300	3,800	4,200

Source: North West Leicestershire Retail & Leisure Study Update 2012

2.22 On the basis of these scenarios, the 2012 RSU identified a requirement of between 2,300 sq.m and 4,200 sq.m of comparison goods sales area floorspace over the duration of the study period to 2031.

2.23 For convenience goods, the same four scenarios were also tested. For the second and fourth scenarios, the convenience expenditure retention rate was expected to increase from 76 per cent to 80 per cent. A summary of the requirements identified is shown below at Table 2.3. It identifies no capacity for additional convenience goods floorspace over the period to 2016, over and above 'committed' floorspace. Under the increasing retention scenarios, a small requirement for additional floorspace (c. 1,100 sq.m sales area) is identified at the end of the study period, at 2021.

Table 2.3 Summary of Convenience Floorspace Needs (2012 RSU)

	2013- 2016 (sq.m net)	2016-2021 (sq.m net)	2021- 2026 (sq.m net)	2026-2031 (sq.m net)
Scenario 1	-4,600	400	600	600
Scenario 2	-4,600	1,100	600	600
Scenario 3	0	500	600	600
Scenario 4	0	1,100	700	700

Source: North West Leicestershire Retail & Leisure Study Update 2012

Qualitative Need for Additional Retail Facilities

2.24 The 2012 RSU also contained a qualitative assessment of future retail requirements within the District. It concluded that Coalville needed to improve the quality of its comparison retail offer and try to attract more middle/high-end retailers to the town centre. We suggested that this could be done by improving the quality and size of retail accommodation within the town centre.

2.25 The 2012 RSU also found that there was little scope to improve the comparison retail offer elsewhere within the study area as other centres, including Ashby Town Centre, served more localised catchment areas. We advised that new comparison floorspace development should be directed to the main town centres, and Coalville in particular, in the first instance.

2.26 In terms of convenience goods provision, we advised in the 2012 RSU that there would be no significant gaps in provision in Ashby once the existing commitments (for discount foodstores) had been implemented. The same was true of provision within Coalville, provided that either one or both of the extant commitments (a foodstore to anchor the redevelopment of the Belvoir Shopping Centre, and a Tesco foodstore on land at Hotel Street) were implemented.

2.27 However, if these commitments were not implemented and completed, we advised in the 2012 RSU that there would be a *"qualitative need for a new convenience goods retail store which is of a sufficient size to meet 'main'/weekly food shopping needs".* We advised that, in the first instance, this development should be directed towards Coalville as there is a *"need for improved foodstore provision in the town centre, and widespread refurbishment/modernisation of the existing retail stock".* We also recommended that Whitwick would benefit from the provision of a small foodstore to assist in meeting day-to-day shopping needs in an area of high deprivation.

3 CHANGES TO DATA INPUTS

Introduction

3.1 In this section we set out the changes to the data inputs which inform our retail capacity update. The changes relate to the following inputs:

- Population projections;
- Per capita expenditure data;
- Special Forms of Trading (such as online shopping);
- Turnover efficiency gain in existing retailers; and
- Retail planning commitments.

Population Projections

3.2 Our update makes use of the most recent 2012-based population projections for each of the seven survey zones which make up the study area, provided by Experian (as per the previous study update). These figures are in line with those presented within the Leicester and Leicestershire Strategic Housing Market Assessment published in June 2014. A summary of the resultant population growth in each of the survey zones by 2031, at the study base year of 2014, and the interval years of 2016, 2021 and 2026, is shown at Table 1 of Appendix A. For ease of reference, we summarise the population growth which is predicted to come forward below in Table 3.1. This shows that the population of the study area is expected to increase by 12,554 persons over the period between 2014 and 2031, based on the Experian projections.

Table 3.1 Population Projection to 2031

	2014	2017	2021	2026	2031
Population of Study Area (2012-based)	95,279	96,535	99,777	103,352	106,639

Source: Table 1, Appendix A

Expenditure Growth Rates

3.3 Updated, 2012-based per capita spending on comparison (non-food) and convenience (food) goods is provided by Experian for each of the study area zones. In order to calculate how much per capita spending is likely to increase over the course of the study period, we apply expenditure growth rates sourced from Experian's Retail Planner Briefing Note 12.1 (RPBN12.1, October 2014) to the base year figures.

3.4 In the 2012 RSU, we adopted comparison goods expenditure growth rates that averaged 1.82 per cent per annum between 2011 and 2016, and 2.90 per cent per annum from 2016 to 2031. Experian's RPBN12.1 now forecasts a comparison goods expenditure growth rate which averages 4.30 per cent per annum between 2012 and 2016, which then reduces to 3.10 per cent per annum from 2016 to 2021, and increases slightly to 3.30 per cent per annum from 2021 onwards. These higher forecasts reflect the improved economic outlook for the UK and follow the more robust performance of the comparison retail sector in recent years.

3.5 For convenience goods, the 2012 RSU adopted average growth rates of -0.48 per cent per annum between 2011 and 2016, 0.68 per cent per annum between 2016 and 2021, and 0.80 per cent, per annum from 2021. Experian's forecasts of expenditure growth in the convenience goods sector from October 2014 have been applied to this update resulting in annual growth rates that average -0.36 per cent per annum between 2012 and 2016; 0.56 per cent from 2016 to 2021; and 0.60 per cent from 2021 onwards. These changes are not significant but reflect the continuing weakness in the convenience goods sector, the shift towards discount retailers and consequent price competition in the market.

3.6 Full details of the growth rates applied to the base year per capita expenditure figures are set out in Table 2a (for comparison goods) and Table 2b (for convenience goods) of Appendix A.

Special Forms of Trading

3.7 Special Forms of Trading' (SFT) is expenditure which is diverted from traditional retail outlets towards channels such as online shopping. SFT therefore acts as a 'claim' on expenditure which is available to support physical retail outlets, and so it is removed from the total expenditure 'pot' in order to ensure that the residual expenditure (i.e. that which is left over having removed the SFT) is entirely available to support actual retail floorspace development.

3.8 Experian's RPBN12.1 provides the most recent published guidance on SFT forecasts. As in the 2012 RSU, we adopt Experian's 'adjusted' SFT rates for the purposes of our assessment, which make allowance for 'store-picked' online transactions (whereby the customer orders a product online, but it is processed by the nearest local branch of the retailer). Table 3.2 shows the SFT forecasts set out in RPBN12.1, alongside those used in the 2012 RSU. It can be seen that there has been a broad increase in the 'claim' of SFT on convenience goods spending relative to that identified previously, but that the comparison goods 'claim' shows a small increase in the period to 2021 but a decrease thereafter when compared to the figures applied in the 2012 RSU.

Table 3.2 Special Forms of Trading

	Comparison goods			Convenience goods		
	SFT discount (2012 RSU)	SFT discount (this study)	Difference	SFT discount (2012 RSU)	SFT discount (this study)	Difference
2014	-	11.7%	-	-	2.6%	-
2016	12.9%	13.2%	+0.3%	2.9%	3.1%	+0.2%
2021	15.8%	15.9%	+0.1%	3.9%	4.4%	+0.5%
2026	16.0%	15.9%	-0.1%	4.4%	5.0%	+0.6%
2031	16.1%	15.5%	-0.6%	4.7%	5.6%	+0.9%

Sales Density Growth

3.9 It is also necessary to make allowance for sales density growth (also known as floorspace productivity growth) for existing comparison and convenience retail floorspace within the study area. This is based on the assumption that existing stores will trade at increasingly efficient levels of turnover per sq.m over the course of the study period. Allowances for sales density growth are linked to expenditure growth and so there are a number of slight changes to sales density figures relative to those used in the 2012 RSU; Table 3.3 summarises the sales density growth rates we have used for the purposes of our assessment.

3.10 Given the continuing low rates of expenditure growth in the convenience retail sector we make no changes to our assumptions in terms of convenience sales density growth rates. However, in light of the more robust rates of comparison goods expenditure growth we raise the short-term growth sales density growth rate from 0 per cent to 1.5 per cent, which is then maintained over the study period to 2031.

Table 3.3 Sales Density Growth Rates

	Comparison goods		Convenience goods	
Sales Density Growth Allowance	2012 RSU (% per annum)	This Study (% per annum)	2012 RSU (% per annum)	This Study (% per annum)
To 2016	0%	1.5%	0%	0%
2016 onwards	1.5%	1.5%	0.3%	0.3%

Retail Floorspace Commitments

3.11 The household survey data that our updated capacity assessment is based on was undertaken in October 2012 to support the 2012 RSU. In order to provide an accurate indication of the amount of surplus comparison and convenience goods expenditure that is available to support new floorspace, it is necessary to deduct the estimated turnovers of retail developments which have been granted permission subsequent to October 2012, because no new household survey of shopping patterns has been undertaken. Such commitments can include developments which have commenced trading subsequent to completion of the household survey, or sites that benefit from an extant planning permission that has not yet been implemented.

3.12 The 2012 RSU made allowance for a number of committed comparison and convenience goods developments. We have reviewed those commitments, in order to establish whether they need to be carried forward again, or removed from the capacity forecasts (for example, if the planning permission has lapsed). In conjunction with the Council, we have also considered applications for new retail floorspace which have been granted permission subsequent to the completion of the 2012 RSU, and we have introduced these as additional 'commitments' where appropriate.

Comparison Retail Commitments

3.13 Table 5 of Appendix A shows the comparison retail commitments which we have included for the purposes of this update. We have 'carried over' two commitments from the 2012 RSU and deleted a third. These are as follows:

- The extension and redevelopment of the Belvoir Shopping Centre. Planning permission was first granted for this scheme in April 2010 (application ref. 09/00359) and the District Council resolved to approve an application to extend the time period for the implementation of the scheme in August 2013 (ref. 13/00330). The scheme has not yet been implemented. We have 'carried over' our assumptions in terms of the net retail floorspace of this scheme and its potential turnover (which is considered to be based on a robust sales density figure of £6,000 per sq.m) to this update.
- The erection of an Aldi foodstore at Nottingham Road, Ashby-de-la-Zouch. This scheme has now been implemented but continues to be treated as a commitment as it is not accounted for in the household survey data from October 2012. We have 'carried over' our assumptions in terms of net retail floorspace but we have updated assumptions in respect of sales density to reflect the latest published company average data for Aldi taken from Verdict's UK Food & Grocery Retailers report (which now indicates a significantly higher turnover per sq.m than was applied in the 2012 RSU).

3.14 The commitment that has not been 'carried over' is the Tesco scheme at Hotel Street Coalville. This planning permission has now expired, Tesco has confirmed its withdrawal from the scheme and the landowner has submitted a new planning application for the redevelopment of the site. The District Council has resolved to approve this revised scheme (ref. 14/00692) which will provide 5,949 sq.m of gross retail floorspace. At time of writing there are no confirmed tenants for the scheme, which will benefit from open A1 retail use.

3.15 We have therefore estimated comparison retail sales area floorspace and turnover on the basis of the assumptions applied within the 'Retail Planning Advice' report provided by PBA to the District Council in respect of the Hotel Street proposals. For the purposes of this report we have adopted the scenario set out within the 'Retail Planning Advice' report which assumed that the scheme would provide up to 1,761 sq.m of comparison goods sales floorspace.

3.16 In addition to the revised Hotel Street scheme we have added a new commitment for a foodstore and a number of small retail units at Station Road, Castle Donington (ref. 13/00702). We have taken figures for the comparison sales area floorspace from the application material. This indicated that the proposed foodstore would provide approximately 186 sq.m of comparison retail floorspace and the 'retail terrace' would provide up to 392 sq.m of comparison retail floorspace within a number of smaller units.

3.17 Table 5 of Appendix A shows that there is now a total of 9,132 sq.m of committed comparison retail sales area floorspace within the study area, which is expected to generate a turnover of approximately £52.18 million per annum. This is slightly higher than the £50.95 million per annum expected to be generated by comparison retail commitments in the 2012 RSU.

Convenience Retail Commitments

3.18 Table 8 of Appendix A shows the convenience retail commitments that we have taken account of in this update. As with the comparison retail commitments we have 'carried over' the proposed convenience retail floorspace within the Belvoir Shopping Centre scheme, updated the turnover data for the Aldi store at Ashby-de-la-Zouch, and removed the previously committed Tesco scheme at Hotel Street, Coalville.

3.19 In terms of additional convenience retail commitments we have included the following:

- Hotel Street, Coalville – the balance of the net retail floorspace expected to be delivered by the revised scheme at Hotel Street (i.e. 2,191 sq.m of convenience goods sales floorspace). The turnover of this floorspace is calculated on the basis of the average convenience goods sales density of the UK's ten main foodstore operators.
- Station Road, Castle Donington – the 1,722 sq.m of convenience goods sales floorspace expected to be derived from the proposed foodstore (based on figures quoted in the planning application material). As an operator is not confirmed for this scheme we have applied an average of the company average sales density figures for the ten main foodstore operators in the UK[2].
- Co-Operative, Whitwick – 285 sq.m of convenience goods sales floorspace based on information provided within the planning application material (ref. 12/00852). The turnover of this floorspace has been calculated on the basis of the company average figures for Co-Operative.
- Co-Operative, Thringstone – 252 sq.m of convenience goods sales floorspace base on information provided within the planning application material (ref. 11/00646). As above, turnover has been calculated on the basis of company average sales density figures for Co-Operative.

[2] Derived from Verdict's UK Food & Grocery Retailers Report (2013)

3.20 Table 8 of Appendix A shows that there is now a total of 8,351 sq.m of committed convenience retail sales area floorspace within the study area which is expected to generate turnover of approximately £81.57 million per annum. This is significantly higher than the £65.21 million per annum expected to be generated by convenience retail commitments in the 2012 RSU.

4 UPDATED RETAIL CAPACITY FORECASTS

Introduction

4.1 In the previous section we have set out the key changes to the data inputs which inform our updates to the comparison and convenience goods capacity forecasts for North West Leicestershire District. Based on these inputs, in this section we set out the revised comparison and convenience goods capacity forecasts for the District. The findings of this section should be read in conjunction with the data tables set out at Appendix A.

Structure of the Quantitative Assessment

4.2 The data tables set out at Appendix A follow the format adopted in the 2012 RSU and are organised as shown in Table 4.1.

Table 4.1 Structure of Quantitative Assessment (Appendix A)

Table	Description
Table 1	Summarises the updated population projections in the seven study area zones, at the base year of 2014, and the interval years of 2016, 2021, 2026 and 2031.
Tables 2a &2b	Show the per capita expenditure on comparison goods (2a) and convenience goods (2b) for the seven zones, at the base and interval years.
Tables 3a & 3b	Sets out updated estimates of total comparison goods spending (3a) and convenience goods spending (3b) for the study area, by multiplying the population figures in Table 1 with the per capita expenditure figures in Tables 2a and 2b. A discount is applied at each interval period for 'Special Forms of Trading' such as online shopping, as discussed in the previous section.
Table 4a	Shows the current market shares (in percentage terms) for comparison goods shopping destinations in the study area. These are unchanged from those in the 2012 Retail Study Update, as no new household survey has been undertaken in support of this update.
Table 4b	Applies the percentage market shares from Table 4a to the total available comparison goods expenditure shown in Table 3a, to show the turnover[3] for each comparison goods shopping destination in monetary terms.
Table 5	Sets out a summary of the comparison goods retail planning commitments which act as a 'claim' on the total available comparison goods expenditure.
Tables 6a-6d	Sets out the revised comparison goods retail capacity forecasts for the study area. Reflecting the approach set out in the previous study, we set out a 'constant retention' capacity forecast (Table 6a) (which assumes current patterns of shopping will remain unchanged over the study period) and an 'increasing retention' forecast (Table 6b), which assumes there will be an increase in the amount of expenditure retained in the study area, and thus a greater amount of surplus expenditure available

[3] We assume equilibrium in shopping patterns between the period of the household survey (in support of the 2012 Retail Study Update) and this Update.

Table	Description
	to support new comparison goods retail floorspace. Tables 6c and 6d then set out these static and increasing retention capacity forecasts but on the basis of an alternative scenario under which the proposed redevelopment of the Belvoir Shopping Centre at Coalville is not implemented.
Tables 7a & 7b	Repeat Tables 4a and 4b but for convenience goods, showing current market shares for each individual destination and their turnover which is calculated by applying the percentage market shares to the total available convenience good expenditure identified in Table 3b.
Table 8	Sets out a summary of the convenience goods retail planning commitments which act as a 'claim' on the total available convenience goods expenditure.
Tables 9a-9d	Sets out the revised convenience goods retail capacity forecasts for the study area, reflecting the scenarios presented at Tables 6a-6d.

Comparison Goods Floorspace Requirements

Main Forecasts

4.3 Our main forecasts of comparison goods floorspace requirements are the static and increasing retention scenarios set out at Tables 6a and 6b of Appendix A. These are summarised in Table 4.2 below.

Table 4.2 Comparison Floorspace Requirements (Main Forecasts)

	2014-16 (sq.m net)	2016-21 (sq.m net)	2021-26 (sq.m net)	2026-31 (sq.m net)	Total 2014-31 (sq.m net)
Static Retention	-9,756	1,090	2,492	3,139	-3,035
Increasing Retention	-9,756	6,964	3,682	4,492	5,383

4.4 Table 4.2 shows that under the static retention forecast, there is a significant oversupply of nearly 10,000 sq.m of comparison goods floorspace in the period to 2016 which is mainly due to the existing commitments at the Belvoir Shopping Centre and Hotel Street in Coalville. Whilst positive requirements are then expected to arise in the subsequent interval periods these would not ameliorate the existing oversupply. The cumulative comparison retail floorspace requirement over the study period therefore stands at just over minus 3,000 sq.m net, under the static relation scenario.

4.5 Under the increasing retention forecast the retention of comparison goods expenditure within the study area is expected to increase from 36 per cent to 45 per cent by 2021, and is maintained at that level thereafter. It assumes that the implementation of existing comparison retail commitments will improve the market shares of destinations within the District. On this basis we forecast that there will be a positive comparison retail floorspace requirement of approximately 5,400 sq.m (sales area) over the study period. However, we note that the bulk of this requirement will not arise until after 2026, with an oversupply persisting until the 2021-2026 period.

4.6 The equivalent forecasts presented in the 2012 RSU were minus 4,576 sq.m (sales area) over the period 2012 to 2031 under the static retention forecast and a positive requirement of 2,927 sq.m sales area under the increasing retention forecast. The reduction in the oversupply of floorspace under the static retention forecast and increase in floorspace requirements under the increasing retention forecast are mainly a result of the higher rates of comparison expenditure growth now anticipated over the study period.

Alternative Scenarios

4.7 Tables 6c and 6d of Appendix A set out static and increasing retention forecasts under the alternative scenario which assumes that the proposed redevelopment of the Belvoir Shopping Centre in Coalville is not implemented. This scheme has had the benefit of planning permission, or been subject to a resolution to grant planning permission, since April 2010 and so there is cause to doubt whether it will be implemented in its current form. We assume that all other commitments will be implemented (we note that the Aldi store at Ashby-de-la-Zouch has already been implemented).

4.8 The comparison floorspace requirements identified at Tables 6c and 6d of Appendix A are summarised below in Table 4.3.

Table 4.3 Comparison Floorspace Requirements (Alternative Scenarios)

	2014-16 (sq.m net)	2016-21 (sq.m net)	2021-26 (sq.m net)	2026-31 (sq.m net)	Total 2014-31 (sq.m net)
Static Retention	-1,266	1,699	3,101	3,748	7,282
Increasing Retention	-1,266	7,574	4,292	5,101	15,700

4.9 As can be seen from Table 4.3, whilst a small oversupply of comparison retail floorspace would still exist in the short term despite the removal of the Belvoir Shopping Centre scheme, this would be ameliorated after 2016 resulting in positive floorspace requirements over the study period of 7,282 sq.m under the static retention forecast and 15,700 sq.m under the increasing retention forecast.

4.10 The alternative scenarios presented in the 2012 RSU assumed that neither of the major comparison retail commitments in the District would be implemented. At that time these were the Belvoir Shopping Centre redevelopment and the Tesco scheme at Hotel Street, Coalville. Tesco has withdrawn from the Coalville scheme and the Council approved revised proposals for the Hotel Street site in late 2014. This revised scheme is included as a commitment in both the main forecasts and alternative scenarios presented by this current update.

Convenience Goods Floorspace Requirements

Main Forecasts

4.11 Our main forecasts of convenience goods floorspace requirements are set out at Tables 9a and 9b of Appendix A. Our findings are summarised below in Table 4.4.

Table 4.4 Convenience Floorspace Requirements (Main Forecasts)

	2014-16 (sq.m net)	2016-21 (sq.m net)	2021-26 (sq.m net)	2026-31 (sq.m net)	Total 2014-31 (sq.m net)
Static Retention	-8,047	339	531	508	-6,669
Increasing Retention	-8,047	1,258	586	569	-5,634

4.12 The assessment shows that under both the static and increasing retention forecasts there is no requirement for additional convenience retail floorspace within the study area in the period to 2031. There is a significant existing oversupply of such floorspace which is expected to persist for the duration of the study period resulting in a total requirement of approximately minus 6,700 sq.m (sales area) under the static retention forecast and minus 5,634 sq.m (sales area) under the increasing retention forecast (the latter assumes an increase in retained convenience goods expenditure from the existing 75 per cent to 80 per cent from 2021 onwards).

4.13 The 2012 RSU also forecast a negative floorspace requirement over the period to 2031 under both static and increased retention scenarios (minus 2,999 sq.m sales area and minus 2,304 sq.m sales area respectively). However, the identified oversupply has increased significantly since the previous study, mainly as a result of new convenience retail commitments, including a new foodstore at Station Road, Castle Donington, as well as lower convenience goods expenditure growth rates over the study period.

Alternative Scenarios

4.14 As with our alternative scenarios for comparison retail floorspace requirements, Tables 9c and 9d assume that the committed retail floorspace that forms part of the Belvoir Shopping Centre redevelopment scheme (which includes a foodstore) does not come forward. The results of these alternative scenarios are summarised in Table 4.5 below.

Table 4.5 Convenience Floorspace Requirements (Alternative Scenarios)

	2014-16 (sq.m net)	2016-21 (sq.m net)	2021-26 (sq.m net)	2026-31 (sq.m net)	Total 2014-31 (sq.m net)
Static Retention	-4,911	386	577	563	-3,385
Increasing Retention	-4,911	1,305	632	617	-2,358

4.15 As this summary demonstrates, the removal of the Belvoir Shopping Centre scheme reduces the oversupply of convenience goods floorspace across the study period but a significant oversupply continues to persist, even under the increasing retention forecast.

5 CONCLUSIONS AND RECOMMENDATIONS

5.1 This report sets out updated assessments of quantitative retail capacity for North West Leicestershire District, and serves as a refresh of the quantitative capacity forecasts set out in the North West Leicestershire Retail Study - 2012 Update (2012 RSU). Specifically, it updates estimates of population growth, per capita expenditure growth, 'special forms of trading' such as online shopping, and commitments for new retail development. Given that no new household telephone survey of shopping patterns has been undertaken in support of this update, we continue to use the findings of the survey undertaken in support of the 2012 RSU as the basis of our assessment. This means that any retail developments which have opened subsequent to completion of the 2012 RSU are included as 'commitments' for the purposes of this update.

Comparison Goods Capacity Forecasts

5.2 Our updated capacity assessment identifies a 'requirement' of between minus 3,000 sq.m and plus 15,700 sq.m additional comparison goods sales area floorspace by 2031. The lower requirement assumes that all current committed comparison goods floorspace is delivered but that this does not lead to an increase in the retention of comparison goods expenditure within the District. This could be due to new developments diverting existing trade rather than generating new trade, or increased competition from destinations outside of the study area.

5.3 The higher requirement assumes that the committed redevelopment of the Belvoir Shopping Centre in Coalville does not proceed but that the other committed developments or town centre interventions result in an improved comparison expenditure retention rate. As the most significant retail development within the study area, the removal of the Belvoir Shopping Centre commitment will 'free up' significant expenditure capacity to support alternative comparison retail floorspace development.

Convenience Goods Capacity Forecasts

5.4 As a result of very low forecasts of convenience goods expenditure growth and the additional convenience retail commitments that have come forward since the time of the 2012 RSU, we do not anticipate any requirement for additional convenience retail floorspace within the District over the study period to 2031. This conclusion holds when we remove the committed foodstore development at the Belvoir Shopping Centre in Coalville, and when we increase the convenience expenditure retention rate within the study area.

Recommendations

5.5 The updated forecasts of comparison goods floorspace requirements presented in this report provide a wide range of figures across the four scenarios. However, at the time of writing, we consider that some scenarios are more likely to come forward than others. There is now some doubt as to whether the proposed redevelopment of the Belvoir Shopping Centre will come forward, at least in the same form that was originally approved in 2010. This means that Scenarios 1 and 2 which assume that all existing commitments are implemented are unlikely to materialise.

5.6 The non-implementation of this commitment will release considerable capacity for additional comparison retail floorspace over the study period. However, in the absence of the Belvoir Shopping Centre scheme, it is unlikely that the other commitments such as the revised scheme at Hotel Street, Coalville, will deliver the same step-change in shopping patterns that would result in a significant improvement to the comparison expenditure retention rate. This would suggest that Scenario 4 (which assumes the non-implementation of the Belvoir Shopping Centre redevelopment but an increased retention rate) would also be unlikely to occur.

5.7 We are therefore of the view that Scenario 3 provides the most realistic basis on which to plan for future comparison retail floorspace requirements within the District at this time. Scenario 3 assumes that the Belvoir Shopping Centre scheme is not implemented and that consequently the comparison expenditure retention rate remains static. Under this scenario there is a requirement for approximately 7,300 sq.m of additional comparison retail sales area floorspace within the District in the period to 2031, including a positive floorspace requirement from 2016. Such a requirement would support the strategic recommendations of the 2012 RSU to deliver quantitative and qualitative improvements to the District’s town centres and particularly Coalville.

5.8 Unlike the comparison goods forecasts, the updated assessment of convenience goods floorspace requirements presents a consistent outcome across all four scenarios that were tested. It is clear that there is no quantitative requirement for additional convenience goods floorspace within the District in the period to 2031. Any new convenience retail floorspace that does come forward should seek to address the qualitative requirements identified in the 2012 RSU, though we note that qualitative requirements for improved local convenience retail provision within Whitwick may be addressed by the commitments for new Co-Operative foodstores in Whitwick and nearby Thringstone.

Monitoring

5.9 We recommend that the floorspace capacity figures for the period beyond 2021 should be treated as indicative, and that the capacity forecasts are subject to regular updates throughout the study period. This is particularly the case given the uncertainty over the delivery of some existing retail floorspace commitments and the effect of these potential developments on shopping patterns within the District.

APPENDIX A RETAIL CAPACITY ASSESSMENT

Table 1: Population of study area to 2031

		Zone 1 Persons	Zone 2 Persons	Zone 3 Persons	Zone 4 Persons	Zone 5 Persons	Zone 6 Persons	Zone 7 Persons	Total Persons
2012	Actual	12,170	11,291	17,514	10,149	9,700	19,409	13,852	94,085
2014	Estimate	12,320	11,429	17,740	10,279	9,826	19,656	14,029	95,279
2016	Estimate	12,476	11,568	17,978	10,418	9,971	19,911	14,213	96,535
2021	Estimate	12,876	11,923	18,594	10,781	10,342	20,570	14,691	99,777
2026	Estimate	13,319	12,317	19,282	11,171	10,740	21,297	15,226	103,352
2031	Estimate	13,742	12,672	19,904	11,528	11,110	21,968	15,715	106,639
2012-31	Change	1,572	1,381	2,390	1,379	1,410	2,559	1,863	12,554

Notes
Base year and projections source: Experian Micromarketer, 2012

Table 2a: Per capita comparison goods spending in study area to 2031

	Zone 1 £	Zone 2 £	Zone 3 £	Zone 4 £	Zone 5 £	Zone 6 £	Zone 7 £
2012	3,136	3,227	2,894	2,922	2,811	2,661	2,486
2014	3,365	3,463	3,106	3,136	3,017	2,856	2,668
2016	3,710	3,818	3,424	3,457	3,326	3,148	2,942
2021	4,322	4,447	3,988	4,027	3,875	3,667	3,427
2026	5,084	5,231	4,691	4,737	4,558	4,314	4,031
2031	5,980	6,153	5,518	5,572	5,361	5,074	4,741

Notes
Applied annual expenditure growth rates:

2012-13	2.60%	(source: Experian Retail Planner Briefing Note 12.1, Figure 1b)
2013-14	4.60%	(Experian Retail Planner Briefing Note 12.1, Figure 1b)
2014-15	5.60%	(Experian Retail Planner Briefing Note 10.1, Figure 1a)
2015-16	4.40%	(Experian Retail Planner Briefing Note 10.1, Figure 1a)
2016-17	3.10%	(Experian Retail Planner Briefing Note 10.1, Figure 1a)
2017-21	3.10%	(Experian Retail Planner Briefing Note 10.1, Figure 1a)
2021+	3.30%	(Experian Retail Planner Briefing Note 10.1, Figure 1a)

Base data source: Experian Micromarketer, 2012.
Growth rates source: Experian Retail Planner Briefing Note 12.1.
All figures at 2012 price base.

Table 2b: Per capita convenience goods spending in study area to 2031

	Zone 1 £	Zone 2 £	Zone 3 £	Zone 4 £	Zone 5 £	Zone 6 £	Zone 7 £
2012	2,134	2,223	2,011	2,051	2,005	1,891	1,900
2014	2,095	2,183	1,975	2,014	1,969	1,857	1,866
2016	2,095	2,183	1,974	2,014	1,969	1,857	1,866
2021	2,155	2,245	2,030	2,071	2,025	1,910	1,919
2026	2,220	2,313	2,092	2,134	2,086	1,968	1,977
2031	2,287	2,384	2,156	2,199	2,150	2,028	2,037

Notes
Applied annual expenditure growth rates:

2012-13	-0.50%	(source: Experian Retail Planner Briefing Note 12.1, Figure 1b)
2013-14	-1.30%	(Experian Retail Planner Briefing Note 12.1, Figure 1b)
2014-15	-0.50%	(Experian Retail Planner Briefing Note 10.1, Figure 1a)
2015-16	0.50%	(Experian Retail Planner Briefing Note 10.1, Figure 1a)
2016-17	0.40%	(Experian Retail Planner Briefing Note 10.1, Figure 1a)
2017-31	0.60%	(Experian Retail Planner Briefing Note 10.1, Figure 1a)

Base data source: Experian Micromarketer, 2012.
Growth rates source: Experian Retail Planner Briefing Note 12.1.
All figures at 2012 price base.

Table 3a: Total comparison goods expenditure available to study area to 2031

		Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Total £m
2012	Base	38.16	36.43	50.68	29.66	27.27	51.64	34.44	268.29
	less SFT	3.97	3.79	5.27	3.08	2.84	5.37	3.58	27.90
	Residual	**34.19**	**32.64**	**45.41**	**26.57**	**24.43**	**46.27**	**30.86**	**240.38**
2014	Base	41.46	39.58	55.09	32.23	29.65	56.13	37.43	291.57
	less SFT	4.85	4.63	6.45	3.77	3.47	6.57	4.38	34.11
	Residual	**36.61**	**34.95**	**48.65**	**28.46**	**26.18**	**49.56**	**33.05**	**257.46**
2016	Base	46.29	44.16	61.55	36.02	33.17	62.68	41.81	325.68
	less SFT	6.11	5.83	8.13	4.75	4.38	8.27	5.52	42.99
	Residual	**40.18**	**38.33**	**53.43**	**31.26**	**28.79**	**54.41**	**36.29**	**282.69**
2021	Base	55.65	53.02	74.16	43.42	40.07	75.44	50.34	392.11
	less SFT	8.85	8.43	11.79	6.90	6.37	11.99	8.00	62.35
	Residual	**46.80**	**44.59**	**62.37**	**36.52**	**33.70**	**63.44**	**42.34**	**329.76**
2026	Base	67.71	64.43	90.46	52.92	48.95	91.87	61.37	477.71
	less SFT	10.77	10.24	14.38	8.41	7.78	14.61	9.76	75.96
	Residual	**56.95**	**54.19**	**76.08**	**44.51**	**41.17**	**77.26**	**51.61**	**401.76**
2031	Base	82.18	77.97	109.84	64.24	59.56	111.47	74.51	579.75
	less SFT	12.74	12.09	17.02	9.96	9.23	17.28	11.55	89.86
	Residual	**69.44**	**65.89**	**92.81**	**54.28**	**50.33**	**94.19**	**62.96**	**489.89**

Notes

Reduction for Special Forms of Trading (e.g. online shopping) applied as follows:

2012	10.40%
2014	11.70%
2016	13.20%
2021	15.90%
2026	15.90%
2031	15.50%

Source: Experian Retail Planner Briefing Note 12.1, Estimated and forecast market share of non-store retail sales (adjusted for SFT sales from stores).
All figures at 2012 price base.

Table 3b: Total convenience goods expenditure available to study area to 2031

		Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Total £m
2012	Base	25.97	25.10	35.21	20.81	19.45	36.71	26.32	189.57
	less SFT	0.47	0.45	0.63	0.37	0.35	0.66	0.47	3.41
	Residual	**25.50**	**24.65**	**34.58**	**20.44**	**19.10**	**36.05**	**25.84**	**186.16**
2014	Base	25.81	24.95	35.03	20.70	19.35	36.51	26.18	188.53
	less SFT	0.67	0.65	0.91	0.54	0.50	0.95	0.68	4.90
	Residual	**25.14**	**24.30**	**34.12**	**20.16**	**18.85**	**35.56**	**25.50**	**183.63**
2016	Base	26.14	25.26	35.50	20.98	19.63	36.98	26.52	191.01
	less SFT	0.81	0.78	1.10	0.65	0.61	1.15	0.82	5.92
	Residual	**25.33**	**24.47**	**34.40**	**20.33**	**19.03**	**35.84**	**25.70**	**185.09**
2021	Base	27.74	26.77	37.75	22.33	20.94	39.29	28.19	203.01
	less SFT	1.22	1.18	1.66	0.98	0.92	1.73	1.24	8.93
	Residual	**26.52**	**25.59**	**36.09**	**21.35**	**20.02**	**37.56**	**26.95**	**194.08**
2026	Base	29.57	28.49	40.34	23.84	22.41	41.91	30.10	216.66
	less SFT	1.48	1.42	2.02	1.19	1.12	2.10	1.50	10.83
	Residual	**28.09**	**27.07**	**38.32**	**22.65**	**21.29**	**39.82**	**28.59**	**205.83**
2031	Base	31.43	30.20	42.90	25.35	23.88	44.55	32.01	230.33
	less SFT	1.76	1.69	2.40	1.42	1.34	2.49	1.79	12.90
	Residual	**29.67**	**28.51**	**40.50**	**23.93**	**22.55**	**42.05**	**30.22**	**217.43**

Notes
Reduction for Special Forms of Trading (e.g. online shopping) applied as follows:

2012	1.80%
2014	2.60%
2016	3.10%
2021	4.40%
2026	5.00%
2031	5.60%

Source: Experian Retail Planner Briefing Note 12.1, Estimated and forecast market share of non-store retail sales (adjusted for SFT sales from stores).
All figures at 2012 price base.

Table 4a: Comparison goods market shares, 2012

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %
Centres in Zone 1							
Castle Donington	3.43%	0.13%	0.00%	0.20%	0.07%	0.12%	0.00%
Kegworth	0.54%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total for zone 1	**3.97%**	**0.13%**	**0.00%**	**0.20%**	**0.07%**	**0.12%**	**0.00%**
Centres in Zone 2							
All centres in zone 2	0.00%	0.11%	0.05%	0.00%	0.00%	0.00%	0.00%
Sub-total for zone 2	**0.00%**	**0.11%**	**0.05%**	**0.00%**	**0.00%**	**0.00%**	**0.00%**
Centres/stores in Zone 3							
Ashby-de-la-Zouch town centre	0.39%	4.54%	22.68%	8.20%	4.94%	1.93%	0.82%
Tesco, Resolution Road, Ashby	0.32%	5.58%	9.57%	5.22%	3.63%	3.29%	2.72%
Retail warehouses, Dents Road, Ashby-de-la-Zouch	0.14%	1.27%	3.14%	2.35%	1.51%	1.31%	0.81%
Moira	0.00%	0.00%	0.98%	0.55%	0.10%	0.00%	0.09%
Sub-total for zone 3	**0.84%**	**11.39%**	**36.37%**	**16.31%**	**10.18%**	**6.53%**	**4.43%**
Centres/stores in Zone 4							
Measham	0.13%	0.81%	0.44%	4.82%	0.37%	0.14%	0.68%
DFS, Tamworth Road, Measham	0.00%	0.30%	0.00%	0.15%	0.29%	0.21%	0.13%
Sub-total for zone 4	**0.13%**	**1.11%**	**0.44%**	**4.97%**	**0.66%**	**0.35%**	**0.81%**
Centres/stores in Zone 5							
Ibstock	0.00%	0.90%	1.09%	1.18%	9.62%	2.47%	1.39%
Sunnyside Garden Centre, Leicester Road, Ibstock	0.00%	0.00%	0.00%	0.00%	0.00%	0.29%	0.00%
Sub-total for zone 5	**0.00%**	**0.90%**	**1.09%**	**1.18%**	**9.62%**	**2.75%**	**1.39%**
Centres/stores in Zone 6							
Coalville town centre	0.97%	23.25%	4.11%	7.39%	25.85%	31.30%	26.85%
Morrisons, Whitwick Road, Coalville	0.24%	2.01%	0.01%	0.16%	2.04%	1.73%	2.06%
Whitwick Retail Park, Whitwick Road, Coalville	0.00%	0.60%	0.74%	0.30%	0.36%	0.68%	0.67%
Other stores/centres in zone 6	0.00%	0.00%	0.30%	0.08%	0.04%	0.46%	0.14%
Sub-total for zone 6	**1.21%**	**25.86%**	**5.17%**	**7.92%**	**28.28%**	**34.18%**	**29.71%**
Centres in Zone 7							
Whitwick	0.00%	0.45%	0.00%	0.06%	0.00%	0.04%	0.34%
Sub-total for zone 7	**0.00%**	**0.45%**	**0.00%**	**0.06%**	**0.00%**	**0.04%**	**0.34%**
Overall sub-total for study area	**6.15%**	**39.95%**	**43.12%**	**30.64%**	**48.82%**	**43.97%**	**36.69%**
Destinations outside study area							
Leicester							
Leicester city centre	1.09%	8.56%	4.26%	3.76%	17.07%	16.91%	13.07%
Fosse Park (including foodstores)	1.13%	8.40%	2.68%	0.97%	10.70%	11.65%	10.25%
All other stores	0.03%	0.60%	0.59%	1.41%	2.40%	2.28%	2.09%
Sub-total, Leicester	**2.25%**	**17.56%**	**7.53%**	**6.15%**	**30.17%**	**30.84%**	**25.41%**
Loughborough							
Loughborough town centre (including foodstores)	14.15%	12.47%	1.46%	0.63%	3.08%	7.96%	14.94%
All other stores	11.10%	10.45%	2.15%	1.48%	4.34%	6.16%	10.35%
Sub-total, Loughborough	**25.24%**	**22.92%**	**3.61%**	**2.11%**	**7.42%**	**14.12%**	**25.30%**
Burton-on-Trent							
Burton-on-Trent town centre	0.09%	2.43%	13.58%	15.65%	2.93%	2.07%	1.49%
All other stores	0.00%	0.24%	2.39%	3.34%	0.54%	0.00%	0.08%
Sub-total, Burton-on-Trent	**0.09%**	**2.67%**	**15.97%**	**18.99%**	**3.47%**	**2.07%**	**1.57%**
Derby							
Derby city centre	18.17%	2.52%	4.83%	1.90%	2.16%	0.49%	0.79%
All other stores	9.93%	0.70%	0.58%	0.11%	0.04%	0.09%	0.00%
Sub-total, Derby	**28.10%**	**3.22%**	**5.41%**	**2.01%**	**2.20%**	**0.58%**	**0.79%**
Nottingham							
Nottingham city centre	13.51%	3.31%	3.23%	1.45%	0.46%	0.93%	3.07%
Long Eaton town centre (including foodstores)	14.42%	1.11%	0.00%	0.00%	0.00%	0.17%	0.10%
All other stores/centres	5.23%	1.11%	0.69%	1.05%	0.72%	1.07%	0.75%
Sub-total, Nottingham	**33.16%**	**5.52%**	**3.92%**	**2.50%**	**1.18%**	**2.17%**	**3.92%**
Tamworth							
Tamworth town centre	0.00%	0.47%	3.82%	8.17%	0.97%	0.21%	0.41%
All other stores	0.00%	0.60%	5.07%	13.37%	0.73%	0.31%	0.39%
Sub-total, Tamworth	**0.00%**	**1.07%**	**8.90%**	**21.54%**	**1.70%**	**0.52%**	**0.81%**
Swadlincote							
All stores	0.05%	0.69%	7.50%	7.24%	0.83%	0.71%	1.19%
Sub-total, Swadlincote	**0.05%**	**0.69%**	**7.50%**	**7.24%**	**0.83%**	**0.71%**	**1.19%**
Other destinations outside study area	4.95%	6.40%	4.05%	8.82%	4.21%	5.02%	4.32%
Overall sub-total for outside study area	**93.85%**	**60.05%**	**56.88%**	**69.36%**	**51.18%**	**56.03%**	**63.31%**
Total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Notes
Source: NEMS Household Survey results (composite market shares), October 2012

Table 4b: Comparison goods spending patterns, 2014

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Total £m	Total %
Total expenditure available at 2014	36.61	34.95	48.65	28.46	26.18	49.56	33.05	257.46	-
Centres in Zone 1									
Castle Donington	1.25	0.05	0.00	0.06	0.02	0.06	0.00	1.43	0.56%
Kegworth	0.20	0.00	0.00	0.00	0.00	0.00	0.00	0.20	0.08%
Sub-total for zone 1	**1.45**	**0.05**	**0.00**	**0.06**	**0.02**	**0.06**	**0.00**	**1.63**	**0.63%**
Centres in Zone 2									
All centres in zone 2	0.00	0.04	0.02	0.00	0.00	0.00	0.00	0.06	0.02%
Sub-total for zone 2	**0.00**	**0.04**	**0.02**	**0.00**	**0.00**	**0.00**	**0.00**	**0.06**	**0.02%**
Centres/stores in Zone 3									
Ashby-de-la-Zouch town centre	0.14	1.59	11.04	2.33	1.29	0.96	0.27	17.62	6.84%
Tesco, Resolution Road, Ashby	0.12	1.95	4.66	1.48	0.95	1.63	0.90	11.69	4.54%
Retail warehouses, Dents Road, Ashby-de-la-Zouch	0.05	0.44	1.53	0.67	0.40	0.65	0.27	4.00	1.55%
Moira	0.00	0.00	0.48	0.16	0.03	0.00	0.03	0.69	0.27%
Sub-total for zone 3	**0.31**	**3.98**	**17.69**	**4.64**	**2.67**	**3.24**	**1.47**	**33.99**	**13.20%**
Centres/stores in Zone 4									
Measham	0.05	0.28	0.22	1.37	0.10	0.07	0.23	2.31	0.90%
DFS, Tamworth Road, Measham	0.00	0.11	0.00	0.04	0.08	0.10	0.04	0.37	0.14%
Sub-total for zone 4	**0.05**	**0.39**	**0.22**	**1.41**	**0.17**	**0.17**	**0.27**	**2.67**	**1.04%**
Centres/stores in Zone 5									
Ibstock	0.00	0.32	0.53	0.34	2.52	1.22	0.46	5.38	2.09%
Sunnyside Garden Centre, Leicester Road, Ibstock	0.00	0.00	0.00	0.00	0.00	0.14	0.00	0.14	0.05%
Sub-total for zone 5	**0.00**	**0.32**	**0.53**	**0.34**	**2.52**	**1.36**	**0.46**	**5.53**	**2.15%**
Centres/stores in Zone 6									
Coalville town centre	0.36	8.12	2.00	2.10	6.77	15.51	8.87	43.74	16.99%
Morrisons, Whitwick Road, Coalville	0.09	0.70	0.01	0.05	0.53	0.86	0.68	2.91	1.13%
Whitwick Retail Park, Whitwick Road, Coalville	0.00	0.21	0.36	0.08	0.09	0.34	0.22	1.31	0.51%
Other stores/centres in zone 6	0.00	0.00	0.15	0.02	0.01	0.23	0.04	0.45	0.18%
Sub-total for zone 6	**0.44**	**9.04**	**2.51**	**2.25**	**7.40**	**16.94**	**9.82**	**48.41**	**18.80%**
Centres in Zone 7									
Whitwick	0.00	0.16	0.00	0.02	0.00	0.02	0.11	0.31	0.12%
Sub-total for zone 7	**0.00**	**0.16**	**0.00**	**0.02**	**0.00**	**0.02**	**0.11**	**0.31**	**0.12%**
Overall sub-total for study area	**2.25**	**13.96**	**20.98**	**8.72**	**12.78**	**21.79**	**12.13**	**92.61**	**35.97%**
Destinations outside study area									
Leicester									
Leicester city centre	0.40	2.99	2.07	1.07	4.47	8.38	4.32	23.70	9.21%
Fosse Park (including foodstores)	0.41	2.94	1.31	0.28	2.80	5.77	3.39	16.89	6.56%
All other stores	0.01	0.21	0.28	0.40	0.63	1.13	0.69	3.36	1.30%
Sub-total, Leicester	**0.82**	**6.14**	**3.66**	**1.75**	**7.90**	**15.28**	**8.40**	**43.95**	**17.07%**
Loughborough									
Loughborough town centre (including foodstores)	5.18	4.36	0.71	0.18	0.81	3.95	4.94	20.12	7.82%
All other stores	4.06	3.65	1.04	0.42	1.14	3.05	3.42	16.79	6.52%
Sub-total, Loughborough	**9.24**	**8.01**	**1.75**	**0.60**	**1.94**	**7.00**	**8.36**	**36.91**	**14.34%**
Burton-on-Trent									
Burton-on-Trent town centre	0.03	0.85	6.61	4.46	0.77	1.03	0.49	14.23	5.53%
All other stores	0.00	0.08	1.16	0.95	0.14	0.00	0.03	2.36	0.92%
Sub-total, Burton-on-Trent	**0.03**	**0.93**	**7.77**	**5.40**	**0.91**	**1.03**	**0.52**	**16.59**	**6.44%**
Derby									
Derby city centre	6.65	0.88	2.35	0.54	0.56	0.24	0.26	11.49	4.46%
All other stores	3.64	0.24	0.28	0.03	0.01	0.05	0.00	4.25	1.65%
Sub-total, Derby	**10.29**	**1.13**	**2.63**	**0.57**	**0.57**	**0.29**	**0.26**	**15.74**	**6.11%**
Nottingham									
Nottingham city centre	4.95	1.16	1.57	0.41	0.12	0.46	1.02	9.68	3.76%
Long Eaton town centre (including foodstores)	5.28	0.39	0.00	0.00	0.00	0.09	0.03	5.79	2.25%
All other stores/centres	1.92	0.39	0.34	0.30	0.19	0.53	0.25	3.90	1.52%
Sub-total, Nottingham	**12.14**	**1.93**	**1.91**	**0.71**	**0.31**	**1.08**	**1.30**	**19.37**	**7.52%**
Tamworth									
Tamworth town centre	0.00	0.16	1.86	2.33	0.25	0.10	0.14	4.84	1.88%
All other stores	0.00	0.21	2.47	3.81	0.19	0.15	0.13	6.96	2.70%
Sub-total, Tamworth	**0.00**	**0.37**	**4.33**	**6.13**	**0.44**	**0.26**	**0.27**	**11.80**	**4.58%**
Swadlincote									
All stores	0.02	0.24	3.65	2.06	0.22	0.35	0.39	6.93	2.69%
Sub-total, Swadlincote	**0.02**	**0.24**	**3.65**	**2.06**	**0.22**	**0.35**	**0.39**	**6.93**	**2.69%**
Other destinations outside study area	1.81	2.24	1.97	2.51	1.10	2.49	1.43	13.55	**5.26%**
Overall sub-total for outside study area	**34.36**	**20.98**	**27.67**	**19.74**	**13.40**	**27.77**	**20.93**	**164.85**	**64.03%**
Total	**36.61**	**34.95**	**48.65**	**28.46**	**26.18**	**49.56**	**33.05**	**257.46**	**100.00%**

Notes
Source: Tables 3a, 4a
All figures at 2012 price base

Table 5: Comparison goods planning commitments

Name	Planning reference	Sales Area Floorspace sq.m	Turnover per sq.m £	Total turnover £m
1. Belvoir Shopping Centre extension/redevelopment, Coalville	13/00330	6,658	6,000	39.95
2. Aldi, Nottingham Road, Ashby-de-la-Zouch	09/00006	135	7,450	1.01
3. Hotel Street, Coalville - Central Scenario	14/00692	1,761	5,000	8.81
4. Supermarket, Station Road, Castle Donington	13/00702	186	6,700	1.25
5. Retail Terrace, Station Road, Castle Donnington	13/00702	392	3,000	1.18
Total		**9,132**		**52.18**

Notes

1. Sales area floorspace based on 70% of GIA for non-foodstore A1 units in the approved development schedule, plus 33% of foodstore sales area.
Sales density based on PBA assessment of what modern floorspace in Coalville town centre could potentially achieve.

2. Aldi turnover derived from Verdict UK Food & Grocery Retailers Report (2013) and based on reduced size of foodstore as allowed at appeal.

3. The central scenrio for the Hotel Street development is based on Scenario 1 set out within PBA's advice to the District Council dated October 2014. As the development would benefit from unrestricted A1 retail use the scenario is based on the assumption that proposed Unit 5 is used for convenience retail and the remaining retail units for comparison retail.

4. & 5. Sales area floorspace figures based on applicants revised retail assessment of December 2013. Sales densitities based on PBA assumptions or derived from Verdict UK Food & Grocery Retailers Report (2013)

All figures at 2012 price base

Tables 6a, 6b, 6c and 6d: Comparison goods capacity forecasts for study area

Table 6a: Scenario 1 — Static retention with all commitments

Column		2014	2016	2021	2026	2031	2014-16	2016-21	2021-26	2026-31	2014-31
A	Total Population	95,279	96,535	99,777	103,352	106,639	1,256	3,242	3,575	3,287	
B	Total Expenditure £m	257.46	282.69	329.76	401.76	489.89	25.23	47.07	71.99	88.14	
C	Retained Expenditure £m	92.61	101.68	118.61	144.51	176.21	9.08	16.93	25.90	31.70	
D	Retained Expenditure %	36%	36%	36%	36%	36%					
E	Leakage £m	164.85	181.01	211.15	257.25	313.68	16.16	30.14	46.10	56.43	
F	Inflow (%)	0%	0%	0%	0%	0%					
G	Inflow £m	0	0	0	0	0	0.00	0.00	0.00	0.00	
H	Total Turnover of Comparison Stores in Study Area £m	92.61	92.61	92.61	92.61	92.61	16.16	30.14	46.10	56.43	
I	Initial Surplus £m/annum (Growth in Retained Expenditure)	0.00	9.08	26.01	51.90	83.61	9.08	16.93	25.90	31.70	
	Claims on Expenditure										
J	Existing Traders £m		2.80	10.17	18.12	26.67	2.80	7.37	7.94	8.56	
K	Commitments		52.18	56.22	60.56	65.24	52.18	4.03	4.34	4.68	
L	*Impact on capacity £m*		54.98	66.39	78.68	91.91	54.98	11.41	12.29	13.24	
	SUMMARY										
M	Initial surplus £m						9.08	16.93	25.90	31.70	
N	Claims on capacity £m						54.98	11.41	12.29	13.24	
O	RESIDUAL £m						-45.91	5.53	13.61	18.46	
P	Turnover per sq m (assumed)						4,706	5,069	5,461	5,883	
Q	Floorspace Requirement for study area (sq.m sales area)						**-9,756**	**1,090**	**2,492**	**3,139**	**-3,035**
R	Floorspace Requirement for study area (sq.m gross)						-13,937	1,557	3,560	4,484	-4,336

Table 6b: Scenario 2 — Increased retention with all commitments

Column		2014	2016	2021	2026	2031	2014-16	2016-21	2021-26	2026-31	2014-31
A	Total Population	95,279	96,535	99,777	103,352	106,639	1,256	3,242	3,575	3,287	
B	Total Expenditure £m	257.46	282.69	329.76	401.76	489.89	25.23	47.07	71.99	88.14	
C	Retained Expenditure £m	92.61	101.68	148.39	180.79	220.45	9.08	46.71	32.40	39.66	
D	Retained Expenditure %	36%	36%	45%	45%	45%					
E	Leakage £m	164.85	181.01	181.37	220.97	269.44	16.16	0.36	39.60	48.47	
F	Inflow (%)	0%	0%	0%	0%	0%					
G	Inflow £m	0	0	0	0	0	0.00	0.00	0.00	0.00	
H	Total Turnover of Comparison Stores in Study Area £m	92.61	92.61	92.61	92.61	92.61	16.16	0.36	39.60	48.47	
I	Initial Surplus £m/annum (Growth in Retained Expenditure)	0.00	9.08	55.79	88.18	127.85	9.08	46.71	32.40	39.66	
	Claims on Expenditure										
J	Existing Traders £m		2.80	10.17	18.12	26.67	2.80	7.37	7.94	8.56	
K	Commitments		52.18	56.22	60.56	65.24	52.18	4.03	4.34	4.68	
L	*Impact on capacity £m*		54.98	66.39	78.68	91.91	54.98	11.41	12.29	13.24	
	SUMMARY										
M	Initial surplus £m						9.08	46.71	32.40	39.66	
N	Claims on capacity £m						54.98	11.41	12.29	13.24	
O	RESIDUAL £m						-45.91	35.30	20.11	26.42	
P	Turnover per sq m (assumed)						4,706	5,069	5,461	5,883	
Q	Floorspace Requirement for study area (sq.m sales area)						**-9,756**	**6,964**	**3,682**	**4,492**	**5,383**
R	Floorspace Requirement for study area (sq.m gross)						-13,937	9,949	5,261	6,416	7,689

Table 6c: Scenario 3 — Static retention, with Belvoir Shopping Centre commitment removed

Column		2014	2016	2021	2026	2031	2014-16	2016-21	2021-26	2026-31	2014-31
A	Total Population	95,279	96,535	99,777	103,352	106,639	1,256	3,242	3,575	3,287	
B	Total Expenditure £m	257.46	282.69	329.76	401.76	489.89	25.23	47.07	71.99	88.14	
C	Retained Expenditure £m	92.61	101.68	118.61	144.51	176.21	9.08	16.93	25.90	31.70	
D	Retained Expenditure %	36%	36%	36%	36%	36%					
E	Leakage £m	164.85	181.01	211.15	257.25	313.68	16.16	30.14	46.10	56.43	
F	Inflow (%)	0%	0%	0%	0%	0%					
G	Inflow £m	0	0	0	0	0	0.00	0.00	0.00	0.00	
H	Total Turnover of Comparison Stores in Study Area £m	92.61	92.61	92.61	92.61	92.61	16.16	30.14	46.10	56.43	
I	Initial Surplus £m/annum (Growth in Retained Expenditure)	0.00	9.08	26.01	51.90	83.61	9.08	16.93	25.90	31.70	
	Claims on Expenditure										
J	Existing Traders £m		2.80	10.17	18.12	26.67	2.80	7.37	7.94	8.56	
K	Commitments		12.23	13.18	14.20	15.29	12.23	0.95	1.02	1.10	
L	*Impact on capacity £m*		15.03	23.35	32.31	41.97	15.03	8.32	8.96	9.65	
	SUMMARY										
M	Initial surplus £m						9.08	16.93	25.90	31.70	
N	Claims on capacity £m						15.03	8.32	8.96	9.65	
O	RESIDUAL £m						-5.96	8.61	16.93	22.05	
P	Turnover per sq m (assumed)						4,706	5,069	5,461	5,883	
Q	Floorspace Requirement for study area (sq.m sales area)						**-1,266**	**1,699**	**3,101**	**3,748**	**7,282**
R	Floorspace Requirement for study area (sq.m gross)						-1,808	2,427	4,430	5,354	10,403

Table 6d: Scenario 4 — Increasing retention, with Belvoir Shopping Centre commitment removed

Column		2014	2016	2021	2026	2031	2014-16	2016-21	2021-26	2026-31	2014-31
A	Total Population	95,279	96,535	99,777	103,352	106,639	1,256	3,242	3,575	3,287	
B	Total Expenditure £m	257.46	282.69	329.76	401.76	489.89	25.23	47.07	71.99	88.14	
C	Retained Expenditure £m	92.61	101.68	148.39	180.79	220.45	9.08	46.71	32.40	39.66	
D	Retained Expenditure %	36%	36%	45%	45%	45%					
E	Leakage £m	164.85	181.01	181.37	220.97	269.44	16.16	0.36	39.60	48.47	
F	Inflow (%)	0%	0%	0%	0%	0%					
G	Inflow £m	0	0	0	0	0	0.00	0.00	0.00	0.00	
H	Total Turnover of Comparison Stores in Study Area £m	92.61	92.61	92.61	92.61	92.61	16.16	0.36	39.60	48.47	
I	Initial Surplus £m/annum (Growth in Retained Expenditure)	0.00	9.08	55.79	88.18	127.85	9.08	46.71	32.40	39.66	
	Claims on Expenditure										
J	Existing Traders £m		2.80	10.17	18.12	26.67	2.80	7.37	7.94	8.56	
K	Commitments		12.23	13.18	14.20	15.29	12.23	0.95	1.02	1.10	
L	*Impact on capacity £m*		15.03	23.35	32.31	41.97	15.03	8.32	8.96	9.65	
	SUMMARY										
M	Initial surplus £m						9.08	46.71	32.40	39.66	23.32
N	Claims on capacity £m						15.03	8.32	8.96	9.65	-6.07
O	RESIDUAL £m						-5.96	38.39	23.44	30.01	29.39
P	Turnover per sq m (assumed)						4,706	5,069	5,461	5,883	
Q	Floorspace Requirement for study area (sq.m sales area)						**-1,266**	**7,574**	**4,292**	**5,101**	**15,700**
R	Floorspace Requirement for study area (sq.m gross)						-1,808	10,819	6,131	7,287	22,428

Notes (Tables 6a, 6b, 6c, 6d)
Sales density growth rates used (Rows J, K and P): 1.5% per annum.
Gross:net ratio (Row R): 70%
All figures at 2012 price base.

Table 7a: Convenience goods market shares, 2012

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %
Stores in Zone 1							
Co-Operative, Station Road, Castle Donington	19.14%	0.44%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-Op, 35-37 Borough Street, Castle Donington	4.08%	0.26%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-Op, 9 Market Place, Kegworth	4.00%	0.00%	0.14%	0.00%	0.00%	0.00%	0.00%
Other stores — Castle Donington	1.84%	0.16%	0.00%	0.00%	0.00%	0.00%	0.00%
Other stores — Kegworth	1.95%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Other stores — Long Whatton	0.48%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total for zone 1	**31.50%**	**0.86%**	**0.14%**	**0.00%**	**0.00%**	**0.00%**	**0.00%**
Stores in Zone 2							
All stores — zone 2	0.00%	1.90%	0.00%	0.32%	0.00%	0.00%	0.00%
Sub-total for zone 2	**0.00%**	**1.90%**	**0.00%**	**0.32%**	**0.00%**	**0.00%**	**0.00%**
Stores in Zone 3							
Tesco, Resolution Road, Ashby-de-la-Zouch	1.35%	23.56%	41.29%	20.65%	15.99%	11.69%	8.39%
Co-Op, 9 Derby Road, Ashby-de-la-Zouch	0.00%	1.42%	11.98%	3.45%	0.29%	0.00%	0.44%
Other stores — Ashby-de-la-Zouch (incl. market)	0.21%	1.49%	8.37%	1.79%	0.30%	1.80%	0.31%
Other stores — zone 3	0.00%	0.00%	1.28%	0.00%	0.00%	0.00%	0.00%
Sub-total for zone 3	**1.56%**	**26.46%**	**62.92%**	**25.89%**	**16.57%**	**13.49%**	**9.14%**
Stores in Zone 4							
Co-Op, 19 High Street, Measham	0.00%	0.00%	0.00%	4.97%	0.00%	0.00%	0.00%
Tesco Express, 14 High Street, Measham	0.00%	0.00%	0.00%	4.17%	0.00%	0.00%	0.00%
Other stores — Measham	0.00%	0.00%	0.00%	3.85%	0.00%	0.00%	0.00%
Other stores — zone 4	0.00%	0.00%	0.16%	1.34%	0.00%	0.00%	0.00%
Sub-total for zone 4	**0.00%**	**0.00%**	**0.16%**	**14.33%**	**0.00%**	**0.00%**	**0.00%**
Stores in Zone 5							
Co-Op, Ashby Road, Ibstock	0.00%	0.55%	0.08%	0.78%	22.96%	1.73%	0.00%
Other stores — Ibstock	0.00%	0.00%	0.00%	0.00%	2.81%	0.26%	0.11%
Other stores — zone 5	0.00%	0.12%	0.32%	0.57%	1.89%	0.05%	0.00%
Sub-total for zone 5	**0.00%**	**0.66%**	**0.39%**	**1.36%**	**27.65%**	**2.04%**	**0.11%**
Stores in Zone 6							
Morrisons, Whitwick Road, Coalville	1.50%	30.55%	4.32%	7.46%	24.98%	36.60%	44.41%
Aldi, Thornborough Road, Coalville	0.40%	9.12%	3.62%	2.54%	16.14%	13.01%	13.46%
Asda, Ashby Road, Coalville (former Netto)	0.00%	4.00%	0.00%	0.07%	2.67%	8.42%	2.39%
Co-Op, Bridge Road, Coalville	0.00%	2.82%	0.00%	0.00%	1.84%	5.77%	2.98%
Lidl, Thornborough Road, Coalville	0.00%	2.20%	1.59%	0.27%	0.27%	2.93%	3.67%
Other stores — Coalville (incl. market)	0.00%	3.95%	0.14%	0.73%	2.96%	8.26%	5.99%
Other stores — zone 6	0.00%	0.00%	0.00%	0.00%	0.39%	1.53%	0.00%
Sub-total for zone 6	**1.90%**	**52.64%**	**9.68%**	**11.07%**	**49.26%**	**76.52%**	**72.91%**
Stores in Zone 7							
All stores — Whitwick	0.00%	1.90%	0.00%	0.00%	0.00%	0.11%	2.76%
Other stores — zone 7	0.00%	0.09%	0.00%	0.00%	0.00%	0.31%	3.56%
Sub-total for zone 7	**0.00%**	**1.99%**	**0.00%**	**0.00%**	**0.00%**	**0.42%**	**6.33%**
Overall sub-total for study area	**34.96%**	**84.52%**	**73.29%**	**52.97%**	**93.49%**	**92.48%**	**88.48%**
Main foodstores outside study area							
Morrisons, Coppice Side, Swadlincote	0.91%	0.59%	13.48%	14.67%	0.27%	0.00%	0.50%
Sainsbury's, Civic Way, Swadlincote	0.00%	0.08%	4.16%	9.14%	0.00%	0.00%	0.00%
Asda, Midland Street, Long Eaton	11.09%	0.33%	0.00%	0.00%	0.00%	0.00%	0.00%
Sainsbury's Local, High Street, Newhall, Swadlincote	0.00%	0.27%	2.28%	5.18%	0.53%	0.00%	1.26%
Sainsbury's, Ashby Road, Loughborough	4.81%	1.67%	0.00%	0.00%	0.67%	0.76%	1.37%
Tesco Extra, Waverley Street, Long Eaton	8.96%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Asda, Ventura Retail Park, Bonehill, Tamworth	0.00%	0.51%	0.36%	5.16%	1.41%	0.00%	0.50%
Asda, 25 Charnwood Road, Shepshed	0.83%	2.34%	0.00%	0.00%	0.44%	1.08%	1.77%
Sainsbury's, Wyvern Way, Chaddesden, Derby	7.15%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Aldi, The Pipeworks, Coppice Side, Swadlincote	0.00%	0.00%	1.44%	5.52%	0.00%	0.00%	0.00%
Tesco Extra, Park Road, Shelthorpe, Loughborough	4.75%	0.78%	0.00%	0.00%	0.00%	0.00%	0.91%
Morrisons, Gorse Covert District Centre, Maxwell Dr, Loughborough	5.80%	0.51%	0.00%	0.00%	0.00%	0.00%	0.00%
Asda, Narborough Road South, Braunstone, Leicester	0.00%	0.00%	0.26%	0.00%	0.64%	2.03%	1.65%
Tesco, Unit 1, The Rushes Shopping Centre, Loughborough	2.05%	1.01%	0.00%	0.00%	0.00%	0.13%	0.90%
Aldi, Cross Street, Long Eaton	2.82%	0.45%	0.00%	0.00%	0.00%	0.00%	0.00%
Aldi, Belton Road, Loughborough	2.80%	0.00%	0.00%	0.00%	0.00%	0.00%	0.15%
All other stores outside study area	13.07%	6.94%	4.72%	7.36%	2.56%	3.53%	2.53%
Overall sub-total for outside study area	**65.04%**	**15.48%**	**26.71%**	**47.03%**	**6.51%**	**7.52%**	**11.52%**
Total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Notes
Source: NEMS Household Survey results (composite market shares), October 2012

Table 7b: Convenience goods spending patterns, 2014

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Total £m	Total %
Total expenditure available at 2013	25.14	24.30	34.12	20.16	18.85	35.56	25.50	183.63	-
Stores in Zone 1									
Co-Operative, Station Road, Castle Donington	4.81	0.11	0.00	0.00	0.00	0.00	0.00	4.92	2.68%
Co-Op, 35-37 Borough Street, Castle Donington	1.03	0.06	0.00	0.00	0.00	0.00	0.00	1.09	0.59%
Co-Op, 9 Market Place, Kegworth	1.01	0.00	0.05	0.00	0.00	0.00	0.00	1.05	0.57%
Other stores — Castle Donington	0.46	0.04	0.00	0.00	0.00	0.00	0.00	0.50	0.27%
Other stores — Kegworth	0.49	0.00	0.00	0.00	0.00	0.00	0.00	0.49	0.27%
Other stores — Long Whatton	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.12	0.07%
Sub-total for zone 1	**7.92**	**0.21**	**0.05**	**0.00**	**0.00**	**0.00**	**0.00**	**8.18**	**4.45%**
Stores in Zone 2									
All stores — zone 2	0.00	0.46	0.00	0.07	0.00	0.00	0.00	0.53	0.29%
Sub-total for zone 2	**0.00**	**0.46**	**0.00**	**0.07**	**0.00**	**0.00**	**0.00**	**0.53**	**0.29%**
Stores in Zone 3									
Tesco, Resolution Road, Ashby-de-la-Zouch	0.34	5.73	14.09	4.16	3.01	4.16	2.14	33.63	18.31%
Co-Op, 9 Derby Road, Ashby-de-la-Zouch	0.00	0.34	4.09	0.70	0.05	0.00	0.11	5.29	2.88%
Other stores — Ashby-de-la-Zouch (incl. market)	0.05	0.36	2.85	0.36	0.06	0.64	0.08	4.41	2.40%
Other stores — zone 3	0.00	0.00	0.44	0.00	0.00	0.00	0.00	0.44	0.24%
Sub-total for zone 3	**0.39**	**6.43**	**21.47**	**5.22**	**3.12**	**4.80**	**2.33**	**43.76**	**23.83%**
Stores in Zone 4									
Co-Op, 19 High Street, Measham	0.00	0.00	0.00	1.00	0.00	0.00	0.00	1.00	0.55%
Tesco Express, 14 High Street, Measham	0.00	0.00	0.00	0.84	0.00	0.00	0.00	0.84	0.46%
Other stores — Measham	0.00	0.00	0.00	0.78	0.00	0.00	0.00	0.78	0.42%
Other stores — zone 4	0.00	0.00	0.06	0.27	0.00	0.00	0.00	0.33	0.18%
Sub-total for zone 4	**0.00**	**0.00**	**0.06**	**2.89**	**0.00**	**0.00**	**0.00**	**2.95**	**1.60%**
Stores in Zone 5									
Co-Op, Ashby Road, Ibstock	0.00	0.13	0.03	0.16	4.33	0.61	0.00	5.26	2.86%
Other stores — Ibstock	0.00	0.00	0.00	0.00	0.53	0.09	0.03	0.65	0.35%
Other stores — zone 5	0.00	0.03	0.11	0.12	0.36	0.02	0.00	0.63	0.34%
Sub-total for zone 5	**0.00**	**0.16**	**0.13**	**0.27**	**5.21**	**0.73**	**0.03**	**6.53**	**3.56%**
Stores in Zone 6									
Morrisons, Whitwick Road, Coalville	0.38	7.43	1.47	1.50	4.71	13.01	11.32	39.83	21.69%
Aldi, Thornborough Road, Coalville	0.10	2.22	1.24	0.51	3.04	4.63	3.43	15.17	8.26%
Asda, Ashby Road, Coalville (former Netto)	0.00	0.97	0.00	0.01	0.50	2.99	0.61	5.09	2.77%
Co-Op, Bridge Road, Coalville	0.00	0.69	0.00	0.00	0.35	2.05	0.76	3.84	2.09%
Lidl, Thornborough Road, Coalville	0.00	0.53	0.54	0.05	0.05	1.04	0.94	3.16	1.72%
Other stores — Coalville (incl. market)	0.00	0.96	0.05	0.15	0.56	2.94	1.53	6.18	3.36%
Other stores — zone 6	0.00	0.00	0.00	0.00	0.07	0.55	0.00	0.62	0.34%
Sub-total for zone 6	**0.48**	**12.79**	**3.30**	**2.23**	**9.28**	**27.21**	**18.59**	**73.89**	**40.24%**
Stores in Zone 7									
All stores — Whitwick	0.00	0.46	0.00	0.00	0.00	0.04	0.70	1.20	0.66%
Other stores — zone 7	0.00	0.02	0.00	0.00	0.00	0.11	0.91	1.04	0.57%
Sub-total for zone 7	**0.00**	**0.48**	**0.00**	**0.00**	**0.00**	**0.15**	**1.61**	**2.25**	**1.22%**
Overall sub-total for study area	**8.79**	**20.54**	**25.01**	**10.68**	**17.62**	**32.89**	**22.56**	**138.08**	**75.19%**
Main foodstores outside study area									
Morrisons, Coppice Side, Swadlincote	0.23	0.14	4.60	2.96	0.05	0.00	0.13	8.11	4.41%
Sainsbury's, Civic Way, Swadlincote	0.00	0.02	1.42	1.84	0.00	0.00	0.00	3.28	1.79%
Asda, Midland Street, Long Eaton	2.79	0.08	0.00	0.00	0.00	0.00	0.00	2.87	1.56%
Sainsbury's Local, High Street, Newhall, Swadlincote	0.00	0.07	0.78	1.04	0.10	0.00	0.32	2.31	1.26%
Sainsbury's, Ashby Road, Loughborough	1.21	0.41	0.00	0.00	0.13	0.27	0.35	2.36	1.29%
Tesco Extra, Waverley Street, Long Eaton	2.25	0.00	0.00	0.00	0.00	0.00	0.00	2.25	1.23%
Asda, Ventura Retail Park, Bonehill, Tamworth	0.00	0.12	0.12	1.04	0.27	0.00	0.13	1.68	0.91%
Asda, 25 Charnwood Road, Shepshed	0.21	0.57	0.00	0.00	0.08	0.38	0.45	1.70	0.92%
Sainsbury's, Wyvern Way, Chaddesden, Derby	1.80	0.00	0.00	0.00	0.00	0.00	0.00	1.80	0.98%
Aldi, The Pipeworks, Coppice Side, Swadlincote	0.00	0.00	0.49	1.11	0.00	0.00	0.00	1.61	0.87%
Tesco Extra, Park Road, Shelthorpe, Loughborough	1.19	0.19	0.00	0.00	0.00	0.00	0.23	1.62	0.88%
Morrisons, Gorse Covert District Centre, Maxwell Dr, Loughborough	1.46	0.12	0.00	0.00	0.00	0.00	0.00	1.58	0.86%
Asda, Narborough Road South, Braunstone, Leicester	0.00	0.00	0.09	0.00	0.12	0.72	0.42	1.35	0.74%
Tesco, Unit 1, The Rushes Shopping Centre, Loughborough	0.52	0.25	0.00	0.00	0.00	0.05	0.23	1.04	0.56%
Aldi, Cross Street, Long Eaton	0.71	0.11	0.00	0.00	0.00	0.00	0.00	0.82	0.45%
Aldi, Belton Road, Loughborough	0.70	0.00	0.00	0.00	0.00	0.00	0.04	0.74	0.40%
All other stores outside study area	3.29	1.69	1.61	1.48	0.48	1.25	0.64	10.45	5.69%
Overall sub-total for outside study area	**16.35**	**3.76**	**9.11**	**9.48**	**1.23**	**2.68**	**2.94**	**45.55**	**24.81%**
Total	**25.14**	**24.30**	**34.12**	**20.16**	**18.85**	**35.56**	**25.50**	**183.63**	100.00%

Notes
Source: Table 3b, Table 7b
All figures at 2012 price base.

Table 8: Convenience goods planning commitments

Name	Planning reference	Sales Area Floorspace sq.m	Turnover per sq.m £	Total turnover £m
1. Belvoir Shopping Centre extension/redevelopment, Coalville	13/00330	3,136	10,000	31.36
2. Aldi, Nottingham Road, Ashby-de-la-Zouch	09/00006	765	11,200	8.57
3. Hotel Street, Coalville - Central Scenario	14/00692	2,191	10,000	21.91
4. Supermarket, Station Road, Castle Donington	13/00702	1,722	10,000	17.22
5. Co-Operative, Market Place, Whitwick	12/00852	285	4,676	1.33
6. Co-Operative, The Green, Thringstone	11/00646	252	4,676	1.18
Total		**8,351**		**81.57**

Notes
1. Sales floorspace based on 75% of GIA for foodstore (ground floor only), and 67 per cent of the sales area being used for convenience goods sales.
Sales density is based on PBA assessment of what modern floorspace in Coalville town centre could potentially achieve.

2. Aldi turnover derived from Verdict UK Food & Grocery Retailers Report (2013) and based on reduced size of foodstore as allowed at appeal.

3. The central scenrio for the Hotel Street development is based on Scenario 1 set out within PBA's advice to the District Council dated October 2014. As the development would benefit from unrestricted A1 retail use the scenario is based on the assumption that proposed Unit 5 is used for convenience retail and the remaining retail units for comparison retail.

4. Sales area floorspace figures derived from applicant's revised retail assessment of December 2013. Sales density figure dervied from Verdict UK Food & Grocery Retailers Report (2013)

5. & 6. Sales area floorspace figures taken from application material and sales densities for the Co-Operative derived from Verdict UK Food & Grocery Retailers Report.

All figures at 2012 price base.

Tables 9a, 9b, 9c and 9d: Convenience goods capacity forecasts for study area

Table 9a: Scenario 1 — Static retention with all commitments

Column		2014	2016	2021	2026	2031	2014-16	2016-21	2021-26	2026-31	2014-31
A	Total Population	95,279	96,535	99,777	103,352	106,639	1,256	3,242	3,575	3,287	
B	Total Expenditure £m	183.63	185.09	194.08	205.83	217.43	1.46	8.99	11.75	11.60	
C	Retained Expenditure £m	138.08	139.18	145.93	154.77	163.49	1.10	6.76	8.83	8.73	
D	Retained Expenditure %	75%	75%	75%	75%	75%					
E	Leakage £m	45.55	45.91	48.14	51.06	53.94	0.36	2.23	2.91	2.88	
F	Inflow (%)	0%	0%	0%	0%	0%					
G	Inflow £m	0	0	0	0	0	0.00	0.00	0.00	0.00	
H	Total Turnover of Convenience Stores in Study Area £m	138.08	138.08	138.08	138.08	138.08	0.36	2.23	2.91	2.88	
I	Initial Surplus £m/annum (Growth in Retained Expenditure)	0.00	1.10	7.85	16.69	25.41	1.10	6.76	8.83	8.73	
	Claims on Expenditure										
J	Existing Traders £m		0.00	2.08	4.20	6.35	0.00	2.08	2.12	2.15	
K	Commitments		81.57	82.80	84.05	85.31	81.57	1.23	1.25	1.27	
L	*Impact on capacity £m*		81.57	84.88	88.24	91.66	81.57	3.31	3.36	3.42	
	SUMMARY										
M	Initial surplus £m						1.10	6.76	8.83	8.73	
N	Claims on capacity £m						81.57	3.31	3.36	3.42	
O	RESIDUAL £m						-80.47	3.44	5.47	5.31	
P	Turnover per sq m (assumed)						10,000	10,151	10,304	10,460	
Q	Floorspace Requirement for study area (sq.m sales area)						**-8,047**	**339**	**531**	**508**	**-6,669**
R	Floorspace Requirement for study area (sq.m gross)						-12,380	522	817	781	-10,260

Table 9b: Scenario 2 — Increased retention with all commitments

Column		2014	2016	2021	2026	2031	2013-16	2016-21	2021-26	2026-31	2014-31
A	Total Population	95,279	96,535	99,777	103,352	106,639	1,256	3,242	3,575	3,287	
B	Total Expenditure £m	183.63	185.09	194.08	205.83	217.43	1.46	8.99	11.75	11.60	
C	Retained Expenditure £m	138.08	139.18	155.26	164.66	173.94	1.10	16.08	9.40	9.28	
D	Retained Expenditure %	75%	75%	80%	80%	80%					
E	Leakage £m	45.55	45.91	38.82	41.17	43.49	0.36	-7.10	2.35	2.32	
F	Inflow (%)	0%	0%	0%	0%	0%					
G	Inflow £m	0	0	0	0	0	0.00	0.00	0.00	0.00	
H	Total Turnover of Convenience Stores in Study Area £m	138.08	138.08	138.08	138.08	138.08	0.36	-7.10	2.35	2.32	
I	Initial Surplus £m/annum (Growth in Retained Expenditure)	0.00	1.10	17.18	26.58	35.86	1.10	16.08	9.40	9.28	
	Claims on Expenditure										
J	Existing Traders £m		0.00	2.08	4.20	6.35	0.00	2.08	2.12	2.15	
K	Commitments		81.57	82.80	84.05	85.31	81.57	1.23	1.25	1.27	
L	*Impact on capacity £m*		81.57	84.88	88.24	91.66	81.57	3.31	3.36	3.42	
	SUMMARY										
M	Initial surplus £m						1.10	16.08	9.40	9.28	
N	Claims on capacity £m						81.57	3.31	3.36	3.42	
O	RESIDUAL £m						-80.47	12.77	6.03	5.87	
P	Turnover per sq m (assumed)						10,000	10,151	10,304	10,304	
Q	Floorspace Requirement for study area (sq.m sales area)						**-8,047**	**1,258**	**586**	**569**	**-5,634**
R	Floorspace Requirement for study area (sq.m gross)						-12,380	1,935	901	876	-8,667

Table 9c: Scenario 3 — Static retention, with Belvoir Shopping Centre commitment removed

Column		2014	2016	2021	2026	2031	2013-16	2016-21	2021-26	2026-31	2014-31
A	Total Population	95,279	96,535	99,777	103,352	106,639	1,256	3,242	3,575	3,287	
B	Total Expenditure £m	183.63	185.09	194.08	205.83	217.43	1.46	8.99	11.75	11.60	
C	Retained Expenditure £m	138.08	139.18	145.93	154.77	163.49	1.10	6.76	8.83	8.73	
D	Retained Expenditure %	75%	75%	75%	75%	75%					
E	Leakage £m	45.55	45.91	48.14	51.06	53.94	0.36	2.23	2.91	2.88	
F	Inflow (%)	0%	0%	0%	0%	0%					
G	Inflow £m	0	0	0	0	0	0.00	0.00	0.00	0.00	
H	Total Turnover of Convenience Stores in Study Area £m	138.08	138.08	138.08	138.08	138.08	0.36	2.23	2.91	2.88	
I	Initial Surplus £m/annum (Growth in Retained Expenditure)	0.00	1.10	7.85	16.69	25.41	1.10	6.76	8.83	8.73	
	Claims on Expenditure										
J	Existing Traders £m		0.00	2.08	4.20	6.35	0.00	2.08	2.12	2.15	
K	Commitments		50.21	50.97	51.74	52.52	50.21	0.76	0.77	0.78	
L	*Impact on capacity £m*		50.21	53.05	55.93	58.86	50.21	2.84	2.88	2.93	
	SUMMARY										
M	Initial surplus £m						1.10	6.76	8.83	8.73	
N	Claims on capacity £m						50.21	2.84	2.88	2.93	
O	RESIDUAL £m						-49.11	3.92	5.95	5.80	
P	Turnover per sq m (assumed)						10,000	10,151	10,304	10,304	
Q	Floorspace Requirement for study area (sq.m sales area)						**-4,911**	**386**	**577**	**563**	**-3,385**
R	Floorspace Requirement for study area (sq.m gross)						-7,556	593	888	866	-5,208

Table 9d: Scenario 4 — Increasing retention, with Belvoir Shopping Centre commitment removed

Column		2014	2016	2021	2026	2031	2013-16	2016-21	2021-26	2026-31	2013-31
A	Total Population	95,279	96,535	99,777	103,352	106,639	1,256	3,242	3,575	3,287	
B	Total Expenditure £m	183.63	185.09	194.08	205.83	217.43	1.46	8.99	11.75	11.60	
C	Retained Expenditure £m	138.08	139.18	155.26	164.66	173.94	1.10	16.08	9.40	9.28	
D	Retained Expenditure %	75%	75%	80%	80%	80%					
E	Leakage £m	45.55	45.91	38.82	41.17	43.49	0.36	-7.10	2.35	2.32	
F	Inflow (%)	0%	0%	0%	0%	0%					
G	Inflow £m	0	0	0	0	0	0.00	0.00	0.00	0.00	
H	Total Turnover of Convenience Stores in Study Area £m	138.08	138.08	138.08	138.08	138.08	0.36	-7.10	2.35	2.32	
I	Initial Surplus £m/annum (Growth in Retained Expenditure)	0.00	1.10	17.18	26.58	35.86	1.10	16.08	9.40	9.28	
	Claims on Expenditure										
J	Existing Traders £m		0.00	2.08	4.20	6.35	0.00	2.08	2.12	2.15	
K	Commitments		50.21	50.97	51.74	52.52	50.21	0.76	0.77	0.78	
L	*Impact on capacity £m*		50.21	53.05	55.93	58.86	50.21	2.84	2.88	2.93	
	SUMMARY										
M	Initial surplus £m						1.10	16.08	9.40	9.28	
N	Claims on capacity £m						50.21	2.84	2.88	2.93	
O	RESIDUAL £m						-49.11	13.24	6.51	6.36	
P	Turnover per sq m (assumed)						10,000	10,151	10,304	10,304	
Q	Floorspace Requirement for study area (sq.m sales area)						**-4,911**	**1,305**	**632**	**617**	**-2,358**
R	Floorspace Requirement for study area (sq.m gross)						-7,556	2,007	973	949	-3,627

Notes (Tables 9a, 9b, 9c, 9d)
Sales density growth rates used (Rows J, K and P): 0% per annum to 2016, 0.3% per annum thereafter.
Gross: net ratio (Row R): 65%
All figures at 2012 price base.