North West Leicestershire Retail Study

Update Report

North West Leicestershire District Council

November 10, 2020

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1.0 Introduction

Purpose of the report

1.1 Lichfields was commissioned by North West Leicestershire District Council in 2018 to prepare a Retail and Leisure Capacity Study (RLCS 2019). The key objective of the RLCS was to provide a robust and credible evidence base to inform the emerging Local Plan Review. The study provided a quantitative and qualitative assessment of the need for new retail and leisure uses within North West Leicestershire District.

1.2 This 2020 report provides a partial update of the study, which has been commissioned to explore the implications of recent changes including new housing, population and expenditure forecasts; potential implications of the Covid-19 pandemic and changes to the Use Classes Order. This update report should be read alongside the RLCS 2019. It replaces the following sections and paragraph references in the RLCS 2019 report:

- Section 4.0: The need for retail uses (paragraphs 4.1 to 4.31 and 4.45 to 4.53;
- Section 5.0: The need for food/beverage uses (paragraphs 5.13 to 5.18);
- Section 8.0: Planning policy analysis (paragraphs 8.1 to 8.45);
- Section 9.0: Accommodating growth (paragraphs 9.3 to 9.18);
- Section 10.0: Conclusions and recommendations (paragraphs 10.1 to 10.19);
- Appendix 2 - Convenience goods capacity;
- Appendix 3 - Comparison goods capacity; and
- Appendix 4 - Food/beverage capacity.

Report structure

1.3 Section 2 of this report provides an update of the retail and food/beverage floorspace capacity assessment based on the latest available population and expenditure projections.

1.4 Section 3 re-examines the options for accommodating the identified floorspace capacity.

1.5 Section 4 reviews potential policy options for the emerging Local Plan Review taking account of updated floorspace capacity projections and recent changes to the Use Classes Order (UCO).

2.0 Updated floorspace capacity assessment

Introduction

2.1 This section updates the quantitative scope for new retail and food/beverage floorspace in the District during the Local Plan up to 2036. The updated projections adopt Experian's latest forecasts for population growth, average expenditure per person, special forms of trading (SFT) and sales density growth rates. A further consideration is the potential implications of the Covid-19 crisis.

Implications of Covid-19 and trends

2.2 As indicated in the RLCS 2019, historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. This growth fuelled demand for new retail floorspace. Since the last recession expenditure growth has been much slower and the demand for retail floorspace has reduced. Experian's latest forecasts suggest slower growth in the short-term and home shopping/internet spending is expected to grow at a much faster rate than traditional shopping. Experian's short-term expenditure growth projections (2020 and 2021) for retail and leisure now reflect the coronavirus pandemic.

2.3 The main implications of the Covid-19 crisis for the evidence base are likely to be as follows:

- impact on the reliability of demographic and economic projections i.e. population growth and Experian expenditure forecasts;
- short terms impact on the mix of uses and customer behaviour that are likely to distort the base year position; and
- longer terms structural impacts that could affect the nature of town centres and the way household shop, eat/drink out and participate in leisure activities.

2.4 The key uncertainties relating to the first two points are primarily the length of crisis/potential further lockdowns and likely recovery period. The longer term structural implications are harder to predict and quantify at this early stage.

2.5 In the short term, operators have faced elevated risk to cash flow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services have been hardest hit. Short term supply chain disruption could lead to inflationary pressure, which may have an impact of consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery are benefiting at least in the short term. There is likely to be a longer terms structural shift to multi-channel shopping, reducing the demand for physical space within town centres. Bearing these trends in mind, following the Covid-19 crisis there is likely to be a spike in town centre vacancies with unfortunately some businesses failing to re-open, particularly non-food retail operators and restaurants. Many national operators have already announced job losses and store closures.

2.6 The Covid-19 could have some short-term impact in terms of population migration levels and a pause in construction activity. Given that the focus of this update is to assess the long-term need over the plan period within five year interval projections (i.e. 2021 to 2026, 2026 to 2031, and 2031 to 2036), the development plan should assume population projections will return to projected levels by 2026. The first interval population projections at 2026, and certainly later years, should not be significantly affected by the Covid-19 crisis.

2.7 Office of National Statistic (ONS) monthly sales volume information for Great Britain indicates total retail sales volumes were over 22% lower in April 2020 compared with the pre-Covid-19 position in February 2020 (seasonally adjusted). However, the July and August 2020 sales volumes had recovered to pre-Covid levels, with the August figure now 4% higher than the pre-Covid figure in February.

2.8 The comparison goods (non-food) sector was particularly affected with a 50% drop in sales from February to April, whilst the food sector experienced 10% growth in sales during March in part due to panic buying at the start of the crisis. Food sales volumes have been consistently higher than the February level during March to August.

2.9 ONS data suggested on-line retail sales peaked at 62% higher in June 2020 compared with February 2020. The latest figures for July and August 2020 were 50% and 47% higher than the pre-Covid sales in February 2020, respectively. Food store on-line sales doubled during May and June but still represents a relatively small proportion of total sales in this sector, reaching about 11%; it remained over 10% during July and August. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April, reaching 44% of sales. On-line sales in this sector remain over 50% higher than pre-Covid levels.

2.10 These Covid-19 affected trends are still at an early stage and it is difficult to predict the longer term implications for retail sales and the amount of on-line sales. Nevertheless, ONS's most recent data suggests retail sales should recover to previous levels of growth but the proportion of retail sales spent on-line is likely to represent a higher proportion of total sales, which will have an impact on traditional bricks and mortar retailing.

2.11 Experian's latest expenditure growth projections were published in October 2020 and assess the likely impact of Covid-19 and Brexit. In the longer term to 2026, 2031 and 2036, Experian recommends relatively modest levels of growth when compared with historic trends. These longer term forecasts should be monitored and kept under review.

2.12 Planning based on long terms expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, the Local Plan must assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth should be adopted.

2.13 For convenience goods, Experian's latest forecasts (October 2020) anticipate limited growth (0.1% per annum after 2027). Experian expects slow growth in the future, but most of the growth will relate to non-store sales. Any need for new convenience goods retail floorspace in North Leicestershire District is likely to relate to population growth or qualitative areas of deficiency.

2.14 For comparison goods, higher levels of growth are expected in the future (between 2.9% to 3% per annum), still at a lower rate than previous pre-recession trends (8% per annum between 1997 and 2007). The previous comparison goods growth forecast was slightly higher in the RLCS 2019 at 3.2% per annum. Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

2.15 New forms of retailing (multi-channel and home shopping) have and will continued to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued strong growth in multi-channel activity. Experian's Retail Planner Briefing Note 18 (October 2020) states:

"After easing in 2021, we expect the SFT (special forms of trading (SFT) market share to continue to grow strongly in the mid-term, hitting around 30% in 2027. The pace of e-commerce is anticipated to moderate over the longer term, reaching 35% of total retail sales by 2040."

2.16 The floorspace capacity assessment in this update makes an allowance for future growth in e-tailing based on Experian projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the needs assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

2.17 Lower expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street in the past decades. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but have now increased to 12.4% in 2020. It seems likely there will be a sharp increase in shops vacancies in many town centres, as and when the impacts of the coronavirus pandemic are fully felt.

2.18 Property owners, landlords and funds have also come under increasing pressure with struggling occupiers seeking to renegotiate terms through company voluntary arrangement (CVA) i.e. an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all of its debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/ leisure assets. These trends are likely to be exacerbated by the coronavirus pandemic, at least in the short-term.

2.19 Whilst the CVA process has created headaches for landlords in terms of rent negotiations, at the same time newly freed-up space has opened up new opportunities. Vacated premises have been reconfigured and reused for food/beverage, trampolines, climbing and indoor golf.

Study area

2.20 As in the RLCS 2019, the quantitative capacity analysis is based on the defined study area zones that cover the catchment areas of the main shopping destinations in the District. The study area is sub-divided into seven zones as shown in Appendix 1 of the RLCS.

Population projections

2.21 Experian's MMG3 population projections have been adopted as shown in Table 1 (Appendix 1). The RLCS 2019 adopted ONS 2014 based sub-national population projections (SNPP 2014). These projections suggested the study area population would increase by +12.8% between 2018 and 2036. The ONS's most up to date SNPP 2018 projections, suggest much higher (+26.4%) growth between 2018 to 2036.

Expenditure forecasts

2.22 All monetary values expressed in this update report are at 2018 prices, consistent with Experian's latest expenditure information. The RLCS adopted a 2016 price base and therefore the figures are not directly comparable.

2.23 Experian's latest national expenditure information (Experian Retail Planner Briefing Note 18 – October 2020) has been used to forecast expenditure within the District. Actual (rather than projected) change in average expenditure per capita during 2017, 2018 and 2019 was as follows:

- convenience goods: +2.0%;

- comparison goods: +13.7%;
- leisure: -1.6%.

2.24 Experian's short term EBS growth forecast rates during 2020, 2021 and 2022 reflect current economic circumstances, including the current Covid-19 crisis. The forecast changes during this period are as follows:

- convenience goods: +14.1%;
- comparison goods: +1.2%;
- leisure: -12.6%.

2.25 These short term forecasts, particularly for comparison goods and leisure, are relatively cautious. In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's medium and long term growth average forecasts have been adopted, as follows:

- convenience goods: 0% per annum growth for 2023 to 2027 and +0.1% per annum after 2027;
- comparison goods: +3.0% per annum growth for 2023 to 2027 and +2.9% per annum after 2027; and
- leisure: +2.9% per annum growth for 2023 to 2027 and +0.9% per annum after 2027.

2.26 These growth figures relate to real growth and exclude inflation.

2.27 Experian's latest adjusted deductions for SFT (i.e. home and online shopping through non-retail businesses) in 2018 were:

- 3.8% of convenience goods expenditure; and
- 16.8% of comparison goods expenditure.

2.28 Experian's projections suggest that these percentages will increase to 5.4% and 22.5% by 2022 respectively. The long term Experian projections suggest an increase to 7.2% and 28.2% by 2036 respectively.

2.29 Table 2 in Appendix 1 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2036, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 2 and food/beverage expenditure is shown in Table 2 in Appendix 3.

2.30 As a consequence of growth in population, total convenience goods spending within the study area is forecast to increase by +24.2% from £235.62 million in 2018 to £292.73 million in 2036, as shown in Table 3 (Appendix 1). Comparable growth in the RLCS was lower at +12.3%.

2.31 Comparison goods spending is forecast to increase by +72.6% between 2018 and 2036, increasing from £343.5 million in 2018 to £592.82 million in 2036, as shown in Table 3 (Appendix 2). Comparable growth in the RLCS was higher at +90.7%.

2.32 Food and beverage spending is forecast to increase by +36.2% between 2018 and 2036, increasing from £129.86 million in 2018 to £178.44 million in 2036, as shown in Table 3 (Appendix 3). Comparable growth in the RLCS was marginally higher at +38.6%.

Growth in turnover densities

2.33 Experian's Retail Planner Briefing Note 18, October 2020 indicates comparison goods retail sales floorspace is expected to increase its average sales density by +2.9% between 2018 to 2022 (average about 0.7% per annum), but higher growth is envisaged in the medium term (+3.0% per annum during 2023 and 2027), and longer term (+2.6% per annum beyond 2027). These increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the likely high increase in on-line/home shopping through retail businesses i.e. the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide.

2.34 For convenience goods retail, Experian indicates a small decrease in sales densities between 2018 and 2022 and no predicted growth in sales densities thereafter.

2.35 Experian does not provide projections for food and beverage sales densities. An average growth rate of 1% per annum has been adopted, consistent with the RLCS 2019.

Base year market shares

2.36 Expenditure patterns in the 2018 base year adopt market shares within each study area zones taken from the RLCS 2019. These market shares were calculated from the results of a household shopper survey in July 2018. These market shares are assumed to remain constant up to 2022 and beyond, because there have been no significant changes in retail and food/beverage provision since the RLCS, although the amount of SFT expenditure deducted has increased based on Experian's latest data.

Capacity for convenience goods retail floorspace

2.37 The future level of available convenience goods expenditure at 2021, 2026, 2031 and 2036 is shown at Tables 6 to 9, Appendix 2.

2.38 The total level of convenience goods expenditure available for shops in the District between 2018 and 2036 is summarised in Table 11, Appendix 2. Convenience expenditure available to shopping facilities in the District is expected to increase from £212.68 million in 2018 to £264.24 million in 2036 due to population growth.

2.39 Table 11 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further development. In the base year there is an expenditure deficit of -£11.73 million suggesting an over-supply of floorspace. By 2021 there is a small surplus of +£9.65 million due to population growth and the closure of the Co-op store at Bridge Road in Coalville in 2020. This surplus is projected to increase to +£26.77 million by 2026, growing to +£40.96 million by 2031 and +£54.37 million by 2036, due to future population growth.

2.40 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 12, Appendix 2. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £12,000 per sq. m, an approximate average turnover density for main food supermarket operators (Aldi, Asda, Lidl, Morrison's, Sainsbury's, Tesco and Waitrose). The figures are summarised in Table 2. below. Projected population growth is expected to generate an expenditure surplus in most parts of the District.

2.41 Surplus expenditure up to 2036 indicates that there is capacity for additional convenience goods floorspace in the District of 6,473 sq.m gross. The RLCS 2019 suggested a much lower floorspace projection of only 960 sq.m gross. This difference is due to the closure of the Co-op store at Bridge Road in Coalville and the much lower population growth suggested by the ONS's 2014 based SNPP projections, i.e. +12.8% between 2018 and 2036 compared with the updated projection of +26.4%.

Table 2.1 Convenience goods floorspace projections (sq.m gross - cumulative)

Centre	by 2021	by 2026	by 2031	by 2036
Ashby de la Zouch	-665	103	740	1,342
Coalville	1,571	2,458	3,193	3,888
Castle Donington	356	441	511	578
Ibstock	-241	-157	-87	-21
Kegworth	92	124	150	175
Measham	-161	-114	-76	-39
Other NW Leicestershire	196	332	445	551
Total	**1,149**	**3,187**	**4,877**	**6,473**

Source: Table 12 in Appendix 2

Capacity for comparison goods floorspace

2.42 As in the RLCS 2019, existing comparison goods floorspace is estimated to be trading at equilibrium in 2018 (i.e. satisfactory levels). Table 10, Appendix 3 assumes that the turnover of comparison floorspace will increase in real terms in the future, as recommended by Experian (Retail Planner Briefing Note 18 – October 2020).

2.43 Table 11 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further development and/or the reoccupation of vacant floorspace. Within the District, there is an available expenditure surplus of +£2.65 million comparison goods expenditure by 2021. This surplus will grow to +£6.41 million by 2026, +£15.74 million by 2031 and +£29.49 million by 2036.

2.44 The comparison goods expenditure surplus is converted into net comparison sales floorspace projections at Table 11, Appendix 3, adopting an average sales density of £6,000 per sq.m net in 2018, which is projected to grow in the future due to improved turnover efficiency. The figures are summarised in Table 2. below.

Table 2.2 Comparison goods floorspace projections (sq.m gross - cumulative)

Centre	by 2021	by 2026	by 2031	by 2036
Ashby de la Zouch	269	553	1,191	1,962
Coalville	244	501	1,077	1,774
Castle Donington	28	58	124	204
Ibstock	23	48	103	170
Kegworth	6	12	8	41
Measham	19	39	84	139
Other NW Leicestershire	10	20	40	72
Total	**599**	**1,231**	**2,647**	**4,361**

Source: Table 11, Appendix 3

2.45 Surplus expenditure up to 2036 indicates that there is capacity for additional comparison goods floorspace in the District of 4,361 sq.m gross. The RLCS 2019 suggested a higher floorspace projection of 8,068 sq.m gross due to the higher expenditure growth and lower growth in turnover efficiency adopted at that time.

Capacity for food/beverage floorspace

2.46 Experian's food and beverage expenditure per capita projections are shown in Table 2, Appendix 4. The total food and beverage expenditure in the study area is £129.86 million in 2018, as shown in Table 3, Appendix 4.

2.47 Food and beverage expenditure per capita is expected to increase in real terms (excluding inflation) by 37.4% between 2018 and 2036. Accounting for population growth, total food and beverage expenditure within the study is expected to increase from £129.86 million in 2018 to £178.44 million by 2036.

2.48 Available food and beverage expenditure has been projected forward to 2021, 2026, 2031 and 2036 in Tables 6 to 9, Appendix 4, and summarised in Table 10. Available food and beverage expenditure to facilities within the District is expected to increase from £86.04 million in 2018 to £118.22 million by 2036.

2.49 For the purposes of this assessment, the existing food and beverage floorspace is estimated to be trading at equilibrium in 2018 (i.e. satisfactory levels). Table 12, Appendix 4 then assumes that the turnover of food and beverage facilities will increase in real terms in the future.

2.50 By 2021, there will be a food and beverage expenditure deficit of -£20.14 million, due to the short term reduction in expenditure causes by the Covid-19 crisis and other expected market conditions. This expenditure deficit implies an over-supply or surplus of floorspace at 2021. By 2026 expenditure and population growth will create a small expenditure surplus of £1.29 million in 2026, which will grow to £9.46 million by 2031 and £15.31 million by 2036. These expenditure projections have been converted into floorspace projections in Table 11, Appendix 4, adopting an average sales density of £5,000 per sq. m gross, which is projected to grow by 1% in the future due to improved turnover efficiency. The results are summarised in Table 2.3 below.

Table 2.3 Food and beverage floorspace projections (sq.m gross - cumulative)

Centre	**Additional Floorspace (sq.m gross)**			
	By 2021	**By 2026**	**By 2031**	**By 2036**
Ashby de la Zouch	-1,702	128	724	1,114
Coalville	-1,000	75	425	655
Castle Donington	-243	18	103	159
Ibstock	-142	11	61	93
Kegworth	-92	7	39	60
Measham	-133	10	57	87
Other	-596	45	254	390
Total	**-3,910**	**293**	**1,663**	**2,560**

Source: Table 11, Appendix 4

2.51 Surplus expenditure up to 2036 indicates that there is capacity for additional food/beverage floorspace in the District of 2,560 sq.m gross. The RLCS 2019 suggested a marginally lower floorspace projection of 2,059 sq.m gross, due to the lower population growth suggested by the ONS's 2014 based SNPP projections.

3.0 Accommodating growth

Introduction

3.1 The revised National Planning Policy Framework (NPPF) indicates development plans should allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability.

Accommodating growth and floorspace projections

3.2 Tables 3.1, 3.2 and 3.3 below summarise the floorspace projections by broad location up to 2026, 2031 and 2036. The distribution of floorspace is based on the existing market shares and expenditure patterns.

Table 3.1 Summary of floorspace projections up to 2026 (sq.m gross)

	Convenience	Comparison	Food/beverage	**Total**
Ashby de la Zouch	103	553	128	784
Coalville	2,458	501	75	3,034
Other NW Leicestershire	625	177	90	892
Total	**3,187**	**1,231**	**293**	**4,710**

Table 3.2 Summary of floorspace projections up to 2031 (sq.m gross)

	Convenience	Comparison	Food/beverage	**Total**
Ashby de la Zouch	740	1,191	724	2,655
Coalville	3,193	1,077	425	4,695
Other NW Leicestershire	944	379	514	1,837
Total	**4,877**	**2,647**	**1,663**	**9,187**

Table 3.3 Summary of floorspace projections up to 2036 (sq.m gross)

	Convenience	Comparison	Food/beverage	**Total**
Ashby de la Zouch	1,342	1,962	1,114	4,418
Coalville	3,888	1,774	655	6,317
Other NW Leicestershire	1,243	625	791	2,659
Total	**6,473**	**4,361**	**2,560**	**13,394**

Source: Table 12 in Appendix 1, Table 11 in Appendix 2 and Table 11 Appendix 3.

3.3 As indicated in the RLCS 2019, the existing stock of premises should help to accommodate projected growth. The retail capacity analysis in this report assumes that existing retail and food/beverage floorspace can, on average, increase its turnover to sales floorspace densities, particularly if retail businesses can maintain recent growth in on-line sales through stores. In addition to the growth in sales densities, vacant floorspace should help to accommodate residual future growth and not all of the projections in Tables 3.1 to 3.3 will require the development of new floorspace.

3.4 In 2018 there were 49 vacant shop units within the District's main centres, which equated to an overall vacancy rate of 8.8%, lower than the Goad national average of 11.3% at that time. It is possible that the vacancy rate will increase in the short term as a result of Covid-19, reflecting a short term over-supply of floorspace. The longer term floorspace projections at 2026 and beyond assume the reoccupation of this potential short term uplift in vacant space. Longer term growth could result in a further reduction in vacant floorspace i.e. below pre-Covid 2018 levels.

3.5 The RLCS 2019 assumed that up to half of the pre-Covid vacant floorspace could be reoccupied and that re-occupied vacant space to accommodate up to 3,550 sq.m gross, broken down as follows:

- Ashby de la Zouch town centre - 750 sq.m gross
- Coalville town centre - 2,400 sq.m gross
- Other local centres - 400 sq.m gross

3.6 The amount of vacant floorspace in Coalville will have increased significantly due to the closure of the Co-op store at Bridge Road. If this store is re-occupied for retail use then the above figure for Coalville could increase to 5,100 sq.m gross.

3.7 If this reduction in vacant units can be achieved, over and above a return to pre-Covid vacancy levels, then the overall retail and food/beverage floorspace 2026 projection for the District as a whole could be accommodated (about 4,700 sq.m gross). This implies there is no pressing need to identify major new allocations for retail and food/beverage development in the short to medium term. The long term projection to 2036 would reduce from about 13,400 sq.m gross to about 7,150 sq.m gross.

3.8 The updated combined floorspace projection for North West Leicestershire (13,394 sq.m gross at 2036) is marginally higher than the RLCS 2019 projection (11,974 sq.m gross at 2036) but the latter did not take account of the closure of the Coop store in Coalville. The mix of floorspace required has changed significantly, with a much higher requirement for convenience goods floorspace and conversely a lower requirement for comparison goods floorspace.

3.9 Some new convenience goods shopping may be required to serve new residential developments in the form of local/ neighbourhood centres, rather than new uses focused in existing town centres. Some of the projected food/beverage floorspace will also be provided in these neighbourhood centres.

Development opportunities

3.10 The RLCS 2019 reviewed potential development opportunities within Ashby de la Zouch and Coalville town centres. In total 9 potential development sites were identified, with a theoretical capacity to accommodate 38,000 sq.m gross of retail and food/beverage floorspace.

3.11 In Ashby de la Zouch, the development sites identified could accommodate 14,000 sq. m gross. As suggested in the RLCS 2019, these opportunity sites, together with the occupation vacant units could accommodate more than three times the floorspace capacity up to 2036.

3.12 In Coalville, the development sites identified could accommodate 24,000 sq. m gross of Class A1 to A5 uses. These opportunity sites, together with the occupation vacant units (up to 5,100 sq.m gross) could accommodate nearly five times the projected floorspace capacity up to 2036 (6,317 sq.m gross).

4.0 Policy review

Introduction

4.1 The RLCS 2019 included a planning policy analysis of relevant adopted policies within the Local Plan – November 2017. This analysis has been revisited in the light of the findings of this update. An appraisal of the implications for the following policies and supporting text has been undertaken:

- Policy S1 (economic development needs to relating to retail floorspace);
- Policy Ec8 (the hierarchy of centres and retail capacity);
- Policy Ec9 (impact test and thresholds);
- Policy Ec10 (primary shopping area, non-shopping uses and protecting A1 uses);
- Policy Ec11 (controlling takeaway uses); and
- Policies Ec12 (protecting local centres).

4.2 The appraisal of these policies takes account changes to the NPPF and PPG in February 2019, the likely short term implications of the Covid-19 crisis and the fundamental changes to the UCO.

National policy and other changes

4.3 The RLCS 2019 was based on the guidance set out in the NPPF published by the Department for Communities and Local Government in July 2018. The revised NPPF was replaced by an amended version in February 2019 but there were no changes to town centre or retail related guidance. The revised NPPF indicates planning policies should (para. 85):

a define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;

b define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;

c retain and enhance existing markets and, where appropriate, re-introduce or create new ones;

d allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;

e where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and

f recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.

4.4 The rapid changes that are affecting the retail sector and town centres, are acknowledged and reflected in the revised NPPF. It recognises that diversification is key to the long-term vitality and viability of town centres, to 'respond to rapid changes in the retail and leisure industries.' Accordingly, planning policies should clarify 'the range of uses permitted in such locations, as part of a positive strategy for the future of each centre'.

4.5 The RLCS noted that a balanced mix of uses is required in town centres. The appropriate balance between retail and other town centre activity has been hotly debated in recent years, as town centres increasingly need to compete with on-line shopping. Online shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centre will become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.

4.6 On 1 September 2020, the Use Classes Order (UCO) was significantly amended. Changes to town centre use classes now allow far greater flexibility for uses to change within town centres without the need to obtain planning permission. The UCO has significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses and retain specific uses previously protected e.g. Class A1 retail. Temporary changes to permitted changes of use up to at least July 2021 will provide further flexibility.

4.7 In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:

- Class E (Commercial, business and service);
- Class F.1 (Learning and non-residential institutions); and
- Class F.2 (Local community).

4.8 The UCO changes now combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as 'main town centre uses" within the NPPF e.g. medical services and some light industrial uses.

4.9 Other changes potentially introduce more restrictions rather than flexibility. Partly in response to the impact of the Covid-19 crisis, there is added protection against the loss of learning, non-residential and community facilities, including museums public halls, sports facilities and local shops. These uses are now included in new Classes F1 and F2. Class F.2 also includes small isolated shops (at least 1 kilometre from a similar shop) selling essential goods including food.

4.10 Other potential 'bad neighbour' town centre uses have been placed in the list of Sui Generis uses, with no permitted changes of use e.g. pubs/bars (A4), takeaways (A5), cinemas and live music venues. The inclusion of these uses as Sui Generis appears to have a dual function i.e. controlling potential 'bad neighbour' uses such as pub/bars and takeaways, whilst protecting against the loss of other cultural facilities such as cinemas and music venues, most vulnerable to the impacts of Covid-19.

4.11 The previous distinction between Class A3, A4 and A5 uses will now become more critical, with Class A3 uses now having more flexibility in the new Class E, but more limited flexibility for Class A4 and A5 uses. Many Class A3 restaurants have offered a takeaway service during the Covid-19 crisis and the categorisation of bar/restaurants has always been arguable and will be a matter of fact and degree on a case by case basis. The Council will need to re-categorise existing uses within the primary shopping area to reflect the new UCO before appropriate policy options can be considered.

4.12 The potential implications of permitted changes in use outside town centres may also have unintended consequences. In theory large out-of-centre B1 office buildings or D2 commercial leisure uses, with no restrictive conditions, could be converted to retail use without planning permission or an assessment of the impact on the town centre or application of the sequential test. Allowing retail uses to occupy out-of-centre buildings could run counter to the objective of maintaining and enhancing town centres. This change could have implications for the effectiveness of retail impact and sequential tests policies.

Meeting needs over the plan period

4.13 The North West Leicestershire Local Plan (NWLLP) was adopted in November 2017. It is widely accepted that long-term projections have inherent uncertainties. In response to these uncertainties, the revised NPPF indicates that local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses should still be accommodated over a minimum ten-year period, which reflects the complexities in bringing forward town centre development sites. Identifying sites to meet needs for ten years or the full plan period is no longer a critical issue in North West Leicestershire District because the updated long term floorspace projections are much lower.

4.14 In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required. The NPPF's presumption in favour of sustainable development (para. 11) remains. For plan-making this means that:

- plans should positively seek opportunities to meet the development needs of their area, and be sufficiently flexible to adapt to rapid change; and
- policies should, as a minimum, provide for objectively assessed needs for housing and other uses, as well as any needs that cannot be met within neighbouring areas.

4.15 The development plan must include strategic policies to address priorities for the development and use of land in its area. Strategic policies should set out the pattern, scale and quality of development, and make sufficient provision for employment, retail, leisure and other commercial development. Strategic policies should provide a clear strategy for bringing sufficient land forward, and at a sufficient rate, to address objectively assessed needs over the plan period. This should include planning for and allocating sufficient sites to deliver the strategic priorities of the area (para. 21).

4.16 The preparation and review of all policies should be underpinned by relevant and up-to-date evidence. This should be adequate and proportionate, focused tightly on supporting and justifying the policies concerned, accounting for relevant market signals (para. 31).

4.17 NWLLP Policy S1 includes references to economic development needs and retail floorspace. It states that provision will be made for 7,300 sq.m for shopping purposes. Supporting text (paragraph 5.11) indicates this 7,300 sq.m figure relates to comparison retail floorspace up to 2031, based on a 2014 retail capacity study. No additional need for convenience retail floorspace was identified.

4.18 The updated floorspace projections suggest a more balanced mix of comparison and convenience goods retail and food/beverage floorspace is required. Policy S1 could be amended to reflect the combined convenience, comparison and food/beverage floorspace projections. Future policy would benefit from a more detailed breakdown of required floorspace across the District and over the plan period as a whole, for example as shown in Table 4.1 below.

Table 4.1 Retail and food/beverage floorspace projections up to 2036 (sq.m gross)

	Convenience	Comparison	Food/beverage	**Total**
Ashby de la Zouch	1,300	2,000	1,100	4,400
Coalville	3,900	1,800	700	6,400
Other NW Leicestershire	1,200	600	800	2,600
Total	**6,400**	**4,400**	**2,600**	**13,400**

4.19 Policy could refer to these floorspace projections being met through the re-occupation of vacant floorspace, particularly in the short term, and new developments in the longer term, taking account of the sequential test.

4.20 Despite the changes to the UCO, future policies can still refer to separate retail and food/beverage floorspace projections, which do not need to be merged with other uses in Class E, such as office and leisure uses. Historically, development plans have included separate floorspace projections for comparison and convenience goods retail although they both fell within Class A1, along with other non-retail services.

4.21 Under the old system, there were permitted development rights for all food and beverage uses to change to Class A1. In a similar way, retail and restaurant/café uses now fall into one new Class E, whilst pubs/bars and takeaways are Sui Generis with no permitted changes. The wording of policy/supporting text referring to use classes A1 etc (e.g. Ec8 and Ec10) should be amended to refer to retail and food/beverage activities rather than use classes.

4.22 The Council can still impose conditions on new development that restrict changes within the new Class E, in the same way comparison, convenience retail floorspace and the sale of specific types of goods have been controlled via conditions for many years. The floorspace projections in this study and retail impact assessments should help to determine when these types of conditions are necessary and appropriate.

Retail hierarchy

4.23 In accordance with the revised NPPF, the NWLLP defines the hierarchy of centres in Policy Ec8, which helps to ensure new town uses are focused within these centres. Policy Ec8 could provide a clearer indication that a key objective is to maintain the vitality and viability of the centres identified within the hierarchy. Based on the scale of facilities available within each settlement and the retail floorspace projections in this update study, the retail hierarchy as set out in Policy Ec8 remains appropriate and sound.

Impact test and thresholds

4.24 The revised NPPF/PPG still indicate that where authorities decide not to set out specific floorspace thresholds in local development plans, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500 sq.m gross.

4.25 Retail and leisure uses previously related to use classes A1 to A5 and D2 leisure uses. Changes to the UCO may lead to confusion, at least until the NPPF is amended to reflect the UCO changes. For example, not all uses within the new Class E are retail or leisure uses, requiring an impact assessment i.e. offices and medical uses.

4.26 NWLLP Policy Ec9 sets out the approach to development outside defined centres. The policy wording refers to 'retail, leisure and office development' which is not entirely consistent with the NPPF. As indicated above and in the RLCS 2019, the NPPF indicates impact assessments are only required for retail and leisure uses, rather than all main town centre uses. For example, impact assessments are not required for office and hotel developments. Bearing in mind the potential for confusion arising from the UCO changes and for consistency with the NPPF, future policy relating to the impact test should continue to refer to retail and leisure uses rather than the new UCO classes.

4.27 As indicated in the RLCS 2019, the NPPF minimum threshold of 2,500 sq.m gross continues to be an inappropriate blanket threshold across North West Leicestershire District, because this scale of development would represent a significant proportion of the overall retail projections for parts of the District. The RLCS indicated the impact thresholds as set out in Policy Ec9 remain appropriate. The adoption of lower thresholds in Ashby de la Zouch and Coalville (1,000 sq.m gross) and in other smaller centres (500 sq.m gross) are endorsed by the updated floorspace capacity projections and recent market conditions.

Town centre boundary and primary shopping area

4.28 The RLCS reviewed the designation of primary shopping areas and town centre boundaries in North West Leicestershire District. These designations remain important when applying the sequential test, i.e. to direct retail, leisure and other town centre uses to sustainable locations and determine whether a retail/leisure impact assessment is required.

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

4.30 The validity of this approach is now questionable with the merger of retail with many other main town centre uses into the new Class E. For example, a proposed leisure use within Class E will satisfy the sequential approach if it is located within the town centre boundary but outside the primary shopping area. This proposed leisure use can subsequently change to retail use without planning permission. With the introduction of Class E, the effectiveness of a separate primary shopping area for sequential test purposes is unclear.

4.31 The next Local Plan should define centre boundaries on the proposals map. The centre boundaries should provide sufficient clarification in relation to the need for an impact and sequential assessment. If retained, the primary shopping area should only relate to Policy Ec10 as reviewed below.

Appropriate mix of uses

4.32 The revised NPPF does not refer to restrictive policies within designated shopping frontage. The aim of the revised NPPF appears to create more flexibility and encourage positive strategies for town centres. The RLCS reviewed adopted Policy Ec10 seeking to control non-shopping uses. Four broad policy approaches that could be adopted in the District were set out in the RLCS, as follows:

1. strengthening Ec10 to provide more control over the loss of retail uses i.e. extending primary shopping area and/or introducing more rigid policy criteria;
2. retaining the current approach in Ec10;
3. relaxing Ec10 to allow a more flexible approach to enable more non-retail uses; or
4. a laissez-faire approach that does not seek to protect retail and town centre uses, on the basis that the market will determine the appropriate mix of uses.

4.33 After considering the advantages and disadvantages of these four approaches, the RLCS recommended Option 2.

4.34 In light of likely future market trends, the revised retail floorspace capacity projections, changes to the UCO described earlier, Option 1 is an unsound and unimplementable approach. The UCO changes prevent a more restrictive approach, recognising that the introduction of Article 4 directions can only remove permitted GPDO changes of uses but not movement within the same use class i.e. new Class E. The continuation of the current adopted policy approach (Option 2) will also be hampered by the UCO changes. As a result of these recent changes, Options 3 and 4 now appear to be the most likely approaches the Council should consider.

4.35 Policy Ec10 could be amended to refer to Class E uses rather than shops (class A1) being "the predominant ground floor uses within the town and local centres". To counter balance this reduced control on the mix of uses, the reference to the primary shopping areas could be removed. The revised policy would protect the loss of Class E uses across the town centre as a whole rather than just the primary shopping area. The development of other main town centre uses not within Class E would then still be considered against the other Ec10 criteria e.g. Sui Generis uses such as takeaways, pubs, bars and bookmakers. These criteria could still refer to the "shopping element", "retail character" of the town centre and the "over-concentration of non-shop uses". This approach will provide more flexibility but will still offer some control rather than the laissez-faire option.

4.36 Policy Ec12 (Local Centres) considers that planning permission will only be granted for the loss of shopping and other main town centre uses within the defined local centre if the premises have been vacant for at least 6 months with evidence of marketing and other factors relating to:

- an appropriate balance between main town centre and non-main town centre uses;
- the contribution the unit makes to the function of the centre in terms of its size and location within the centre;
- the nature and characteristics of the proposed use and the type and characteristics of other uses within proximity of the application site; and
- the impact of the proposal on the shopping and service character and function of the local centre.

4.37 These objectives are still valid and the approach in Policy Ec12 still appears to be robust and appropriate. The changes to the UCO do not appear to undermine the implementation of Policy Ec12, although as indicated earlier, there are some uses not previously considered to be main town centre uses that are now included in the new Class E.

4.38 Policy Ec11 relates to hot food takeaways (previously Class A5). This use is now Sui Generis following the UCO changes. The changes to the UCO do not undermine the implementation of Policy Ec11. The objectives relating to the impact on amenity, traffic, safety and the health of local residents remain valid considerations.

5.0 Conclusions and recommendations

Accommodating growth

5.1 This updated study indicates the projected capacity for retail and food/beverage floorspace has changed since the RLCS 2019 was prepared. The revised projections suggest a more balanced mix of comparison and convenience goods retail and food/beverage floorspace is required up to 2036 totalling 13,400 sq.m gross. Future policy should indicate this floorspace projection can be accommodated through the re-occupation of vacant floorspace in the short-term and new development in the longer term (after 2026).

Other policy options

5.2 Based on the scale of facilities available within each settlement and the retail floorspace projections in this update, the retail hierarchy as set out in NWLLP Policy Ec8 remains appropriate and sound. However, Policy Ec8 could indicate the key objective is to maintain the vitality and viability of the centres identified within the hierarchy.

5.3 Policy Ec9 refers to the impact of 'retail, leisure and office development'. The NPPF indicates impact assessments are only required for retail and leisure uses, rather than all main town centre uses. Future policy relating to the impact test should continue to refer to retail and leisure uses rather than the new UCO classes. The lower impact thresholds in Policy Ec9 remain appropriate and are endorsed by the updated floorspace capacity projections and recent market conditions.

5.4 The next Local Plan should continue to define centre boundaries on the proposals map, which should provide sufficient clarification in relation to the need for an impact and sequential assessment.

5.5 Policy Ec10 could be amended to refer to Class E uses rather than shops (class A1) being "the predominant ground floor uses within the town and local centres" and the areas protected could be extended by removing the primary shopping areas. This approach will provide more flexibility but will still offer some degree of control.

5.6 The objectives of Policies Ec11 and Ec12 are still robust and appropriate. The changes to the UCO do not significantly undermine the implementation of these policies.

Appendix 1 Convenience goods capacity

Table 1 - Study area population

Zone	2018	2021	2026	2031	2036
Zone 1 - Castle Donington & Kegworth	13,012	13,684	14,706	15,626	16,450
Zone 2 - North of Coalville	11,792	12,401	13,327	14,161	14,907
Zone 3 - Ashby de la Zouch	19,705	20,722	22,270	23,663	24,911
Zone 4 - Measham	10,864	11,425	12,278	13,046	13,734
Zone 5 - Ibstock	11,405	11,994	12,890	13,696	14,418
Zone 6 - Coalville	21,505	22,615	24,304	25,825	27,187
Zone 7 - Whitwick	13,843	14,558	15,645	16,624	17,500
Total	**102,126**	**107,399**	**115,420**	**122,641**	**129,108**

Sources: Experian 2018

North West Leicestershire District - Office of National Statistics 2018 SNPP projections

Table 2 - Convenience goods expenditure per person per annum (£)

Zone	2018	2021	2026	2031	2036
Zone 1 - Castle Donington & Kegworth	2,302	2,259	2,266	2,261	2,262
Zone 2 - North of Coalville	2,473	2,427	2,435	2,429	2,431
Zone 3 - Ashby de la Zouch	2,344	2,301	2,308	2,302	2,304
Zone 4 - Measham	2,318	2,275	2,282	2,277	2,278
Zone 5 - Ibstock	2,307	2,264	2,271	2,266	2,267
Zone 6 - Coalville	2,248	2,207	2,213	2,208	2,209
Zone 7 - Whitwick	2,200	2,159	2,166	2,161	2,162

Sources:

Experian Local Expenditure 2018 (2018 prices) and Retail Planner Briefing Note 18 (October 2020)

Excludes Special Forms of Trading based on Experian adjusted national average for non-retail businesses

Table 3 - Total convenience goods expenditure (£m)

Zone	2018	2021	2026	2031	2036
Zone 1 - Castle Donington & Kegworth	29.95	30.92	33.33	35.33	37.22
Zone 2 - North of Coalville	29.17	30.10	32.45	34.40	36.24
Zone 3 - Ashby de la Zouch	46.20	47.68	51.40	54.48	57.40
Zone 4 - Measham	25.19	26.00	28.02	29.71	31.29
Zone 5 - Ibstock	26.31	27.16	29.27	31.03	32.69
Zone 6 - Coalville	48.35	49.90	53.79	57.02	60.07
Zone 7 - Whitwick	30.46	31.43	33.89	35.92	37.84
Study Area Total	**235.62**	**243.19**	**262.15**	**277.88**	**292.73**

Source: Tables 1 and 2

Table 4 - Base year 2018 convenience goods market shares (%)

Store/Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow
Main Centres								
Co-op, Derby Road, Ashby de la Zouch	0.0%	0.0%	11.9%	2.2%	1.7%	0.0%	1.6%	10.0%
Co-op, Market Street, Ashby de la Zouch	0.0%	0.3%	7.0%	0.6%	0.3%	0.0%	0.6%	10.0%
Tesco Extra, Resolution Road, Ashby de la Zouch	1.8%	27.9%	30.8%	20.9%	19.5%	7.9%	8.2%	10.0%
Aldi, Dents Road, Ashby de la Zouch	3.4%	6.8%	13.5%	13.4%	12.5%	0.9%	0.4%	10.0%
Marks & Spencer Foodhall, Smithy Road, Ashby de la Zouch	0.0%	1.1%	5.1%	1.4%	1.2%	0.9%	0.2%	10.0%
Other - Ashby de la Zouch	0.0%	0.4%	2.8%	0.4%	0.0%	0.0%	0.0%	10.0%
Asda, Ashby Road, Coalville	0.0%	0.5%	0.0%	0.3%	2.0%	7.6%	0.7%	10.0%
Co-op, Bridge Road, Coalville	0.0%	2.5%	0.0%	0.0%	0.6%	8.7%	0.3%	10.0%
Co-op, Cropston Drive, Greenhill, Coalville	0.0%	0.4%	0.0%	0.0%	0.0%	0.7%	3.4%	10.0%
Home Bargains, Belvoir Shopping Centre, Coalville	0.0%	1.5%	0.0%	0.0%	0.0%	2.4%	0.7%	10.0%
Aldi, Thornborough Road, Coalville	0.0%	12.3%	0.0%	1.4%	13.4%	17.3%	22.1%	10.0%
Co-op, Meadlow Lane, Coalville	0.0%	0.5%	0.0%	0.0%	0.0%	1.7%	4.2%	10.0%
Lidl, Thornborough Road, Coalville	0.3%	5.1%	0.4%	0.7%	4.7%	6.7%	7.7%	10.0%
Morrisons, Whitwick Road, Coalville	0.3%	14.5%	0.2%	2.3%	17.0%	30.2%	34.2%	10.0%
Other - Coalville	0.0%	1.9%	0.0%	0.0%	0.0%	2.6%	1.0%	10.0%
Co-op, Borough Street, Castle Donington	9.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Co-op, Station Road, Castle Donington	12.1%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Premier, Huntington Drive, Castle Donington	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Other - Castle Donington	1.2%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	5.0%
Co-op, Ashby Road, Ibstock	0.0%	0.0%	0.0%	2.9%	23.4%	2.8%	0.0%	5.0%
Other - Ibstock	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	5.0%
Co-op, Market Place, Kegworth	10.3%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Co-op, High Street, Measham	0.0%	0.0%	0.0%	10.0%	0.0%	0.0%	0.0%	5.0%
Tesco Express, High Street, Measham	0.0%	0.0%	0.4%	7.6%	0.0%	0.0%	0.0%	5.0%
Other North West Leicestershire								
Local shops, Donisthorpe	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	5.0%
Londis, Whitehill Road, Ellistown	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	5.0%
McColls, Central Road, Hugglescote	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	0.0%	5.0%
Local shops, Moira	0.0%	0.4%	1.4%	0.0%	0.0%	0.0%	0.0%	5.0%
Local shops, Packington	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	5.0%
Local shops, Ravenstone	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	5.0%
Co-op, High Street, Swadlincote	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	5.0%
Co-op, Shortheath Road, Swadlincote	0.0%	0.0%	3.7%	2.5%	0.0%	0.0%	0.0%	5.0%
Co-op, The Green, Thrigstone	0.0%	8.1%	0.0%	0.0%	0.0%	0.0%	0.7%	5.0%
Local shops, Long Whatton	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Co-op, Market Place, Whitwick	0.0%	2.8%	0.0%	0.0%	0.0%	0.5%	8.2%	5.0%
Local shops, Whitwick	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	1.4%	5.0%
North West Leicestershire District Total	**44.0%**	**88.3%**	**77.5%**	**67.9%**	**97.7%**	**96.7%**	**95.6%**	**-**
Elsewhere								
Loughborough	24.2%	3.6%	0.3%	0.0%	0.2%	1.3%	2.3%	n/a
Long Eaton	23.0%	0.3%	1.1%	0.2%	0.0%	0.0%	0.0%	n/a
Hinckley	0.0%	0.0%	0.0%	0.5%	0.2%	0.5%	0.3%	n/a
Lichfield	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	n/a
Atherston	0.4%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	n/a
Swadlincote	0.5%	3.7%	18.0%	24.5%	1.1%	0.0%	0.0%	n/a
Leicester	0.2%	1.2%	0.0%	0.1%	0.0%	1.3%	1.4%	n/a
Tamworth	0.0%	1.5%	1.7%	4.2%	0.8%	0.0%	0.1%	n/a
Other	7.7%	1.4%	1.4%	1.9%	0.0%	0.2%	0.3%	n/a
Elsewhere Total	**56.0%**	**11.7%**	**22.5%**	**32.1%**	**2.3%**	**3.3%**	**4.4%**	**-**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**-**

NEMS Household Survey July 2018 (weighted results)

Table 5 - Base year 2018 convenience goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2018	**29.95**	**29.17**	**46.20**	**25.19**	**26.31**	**48.35**	**30.46**		**235.62**
Main Centres									
Co-op, Derby Road, Ashby de la Zouch	0.00	0.00	5.50	0.55	0.45	0.00	0.49	0.78	7.76
Co-op, Market Street, Ashby de la Zouch	0.00	0.09	3.23	0.15	0.08	0.00	0.18	0.41	4.15
Tesco Extra, Resolution Road, Ashby de la Zouch	0.54	8.14	14.23	5.26	5.13	3.82	2.50	4.40	44.02
Aldi, Dents Road, Ashby de la Zouch	1.02	1.98	6.24	3.38	3.29	0.44	0.12	1.83	18.29
Marks & Spencer Foodhall, Smithy Road, Ashby de la Zouch	0.00	0.32	2.36	0.35	0.32	0.44	0.06	0.43	4.27
Other - Ashby de la Zouch	0.00	0.12	1.29	0.10	0.00	0.00	0.00	0.17	1.68
Asda, Ashby Road, Coalville	0.00	0.15	0.00	0.08	0.53	3.67	0.21	0.52	5.15
Co-op, Bridge Road, Coalville	0.00	0.73	0.00	0.00	0.16	4.21	0.09	0.58	5.76
Co-op, Cropston Drive, Greenhill, Coalville	0.00	0.12	0.00	0.00	0.00	0.34	1.04	0.17	1.66
Home Bargains, Belvoir Shopping Centre, Coalville	0.00	0.44	0.00	0.00	0.00	1.16	0.21	0.20	2.01
Aldi, Thornborough Road, Coalville	0.00	3.59	0.00	0.35	3.53	8.36	6.73	2.51	25.07
Co-op, Meadlow Lane, Coalville	0.00	0.15	0.00	0.00	0.00	0.82	1.28	0.25	2.50
Lidl, Thornborough Road, Coalville	0.09	1.49	0.18	0.18	1.24	3.24	2.35	0.97	9.73
Morrisons, Whitwick Road, Coalville	0.09	4.23	0.09	0.58	4.47	14.60	10.42	3.83	38.31
Other - Coalville	0.00	0.55	0.00	0.00	0.00	1.26	0.30	0.24	2.35
Co-op, Borough Street, Castle Donington	2.85	0.00	0.00	0.00	0.00	0.00	0.00	0.15	3.00
Co-op, Station Road, Castle Donington	3.62	0.20	0.00	0.00	0.00	0.00	0.00	0.20	4.03
Premier, Huntington Drive, Castle Donington	1.26	0.00	0.00	0.00	0.00	0.00	0.00	0.07	1.32
Other - Castle Donington	0.36	0.00	0.14	0.00	0.00	0.00	0.00	0.03	0.52
Co-op, Ashby Road, Ibstock	0.00	0.00	0.00	0.73	6.16	1.35	0.00	0.43	8.67
Other - Ibstock	0.00	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.08
Co-op, Market Place, Kegworth	3.09	0.06	0.00	0.00	0.00	0.00	0.00	0.17	3.31
Co-op, High Street, Measham	0.00	0.00	0.00	2.52	0.00	0.00	0.00	0.13	2.65
Tesco Express, High Street, Measham	0.00	0.00	0.18	1.91	0.00	0.00	0.00	0.11	2.21
Other North West Leicestershire									
Local shops, Donisthorpe	0.00	0.00	0.00	0.23	0.00	0.00	0.00	0.01	0.24
Londis, Whitehill Road, Ellistown	0.00	0.00	0.00	0.00	0.00	0.73	0.00	0.04	0.76
McColls, Central Road, Hugglescote	0.00	0.00	0.00	0.00	0.00	2.08	0.00	0.11	2.19
Local shops, Moira	0.00	0.12	0.65	0.00	0.00	0.00	0.00	0.04	0.80
Local shops, Packington	0.00	0.00	0.00	0.00	0.24	0.00	0.00	0.01	0.25
Local shops, Ravenstone	0.00	0.00	0.00	0.00	0.05	0.00	0.00	0.00	0.06
Co-op, High Street, Swadlincote	0.00	0.00	0.00	0.10	0.00	0.00	0.00	0.01	0.11
Co-op, Shortheath Road, Swadlincote	0.00	0.00	1.71	0.63	0.00	0.00	0.00	0.12	2.46
Co-op, The Green, Thrigstone	0.00	2.36	0.00	0.00	0.00	0.00	0.21	0.14	2.71
Local shops, Long Whatton	0.27	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.28
Co-op, Market Place, Whitwick	0.00	0.82	0.00	0.00	0.00	0.24	2.50	0.19	3.74
Local shops, Whitwick	0.00	0.12	0.00	0.00	0.00	0.00	0.43	0.03	0.57
North West Leicestershire District Total	**13.18**	**25.75**	**35.80**	**17.10**	**25.70**	**46.75**	**29.12**	**19.27**	**212.68**
Elsewhere									
Loughborough	7.25	1.05	0.14	0.00	0.05	0.63	0.70	n/a	9.82
Long Eaton	6.89	0.09	0.51	0.05	0.00	0.00	0.00	n/a	7.54
Hinckley	0.00	0.00	0.00	0.13	0.05	0.24	0.09	n/a	0.51
Lichfield	0.00	0.00	0.00	0.10	0.00	0.00	0.00	n/a	0.10
Atherston	0.12	0.00	0.00	0.08	0.00	0.00	0.00	n/a	0.20
Swadlincote	0.15	1.08	8.32	6.17	0.29	0.00	0.00	n/a	16.00
Leicester	0.06	0.35	0.00	0.03	0.00	0.63	0.43	n/a	1.49
Tamworth	0.00	0.44	0.79	1.06	0.21	0.00	0.03	n/a	2.52
Other	2.31	0.41	0.65	0.48	0.00	0.10	0.09	n/a	4.03
Elsewhere Total	**16.77**	**3.41**	**10.39**	**8.09**	**0.61**	**1.60**	**1.34**	**n/a**	**42.21**
TOTAL	**29.95**	**29.17**	**46.20**	**25.19**	**26.31**	**48.35**	**30.46**	**19.27**	**254.89**

Source: *Tables 3 and 4*

Table 6 - Future 2021 convenience goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2021	**30.92**	**30.10**	**47.68**	**26.00**	**27.16**	**49.90**	**31.43**		**243.19**
Main Centres									
Ashby de la Zouch	1.61	10.99	33.90	10.11	9.56	4.84	3.46	8.27	82.74
Coalville	0.19	11.80	0.29	1.22	10.24	38.87	23.36	9.55	95.51
Castle Donington	8.35	0.21	0.14	0.00	0.00	0.00	0.00	0.46	9.16
Ibstock	0.00	0.00	0.00	0.75	6.44	1.40	0.00	0.45	9.04
Co-op, Market Place, Kegworth	3.18	0.06	0.00	0.00	0.00	0.00	0.00	0.17	3.42
Measham	0.00	0.00	0.19	4.58	0.00	0.00	0.00	0.25	5.02
Other NW Leicestershire	0.28	3.52	2.43	0.99	0.30	3.14	3.24	0.73	14.63
North West Leicestershire District Total	**13.60**	**26.58**	**36.95**	**17.65**	**26.53**	**48.25**	**30.05**	**19.89**	**219.51**
Elsewhere	17.31	3.52	10.73	8.34	0.62	1.65	1.38	n/a	43.56
TOTAL	**30.92**	**30.10**	**47.68**	**26.00**	**27.16**	**49.90**	**31.43**	**19.89**	**263.08**

Source: *Tables 3 and 4*

Table 7 - Future 2026 convenience goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2026	**33.33**	**32.45**	**51.40**	**28.02**	**29.27**	**53.79**	**33.89**		**262.15**
Main Centres									
Ashby de la Zouch	1.73	11.84	36.54	10.90	10.30	5.22	3.73	8.92	89.19
Coalville	0.20	12.72	0.31	1.32	11.04	41.90	25.18	10.30	102.96
Castle Donington	9.00	0.23	0.15	0.00	0.00	0.00	0.00	0.49	9.87
Ibstock	0.00	0.00	0.00	0.81	6.94	1.51	0.00	0.49	9.74
Co-op, Market Place, Kegworth	3.43	0.06	0.00	0.00	0.00	0.00	0.00	0.18	3.68
Measham	0.00	0.00	0.21	4.93	0.00	0.00	0.00	0.27	5.41
Other NW Leicestershire	0.30	3.80	2.62	1.06	0.32	3.39	3.49	0.79	15.77
North West Leicestershire District Total	**14.66**	**28.65**	**39.83**	**19.03**	**28.60**	**52.02**	**32.39**	**21.44**	**236.63**
Elsewhere	18.66	3.80	11.56	9.00	0.67	1.78	1.49	n/a	46.96
TOTAL	**33.33**	**32.45**	**51.40**	**28.02**	**29.27**	**53.79**	**33.89**	**21.44**	**283.59**

Source: *Tables 3 and 4*

Table 8 - Future 2031 convenience goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2031	**35.33**	**34.40**	**54.48**	**29.71**	**31.03**	**57.02**	**35.92**		**277.88**
Main Centres									
Ashby de la Zouch	1.84	12.55	38.74	11.56	10.92	5.53	3.95	9.45	94.54
Coalville	0.21	13.48	0.33	1.40	11.70	44.42	26.69	10.91	109.14
Castle Donington	9.54	0.24	0.16	0.00	0.00	0.00	0.00	0.52	10.47
Ibstock	0.00	0.00	0.00	0.86	7.35	1.60	0.00	0.52	10.33
Co-op, Market Place, Kegworth	3.64	0.07	0.00	0.00	0.00	0.00	0.00	0.20	3.90
Measham	0.00	0.00	0.22	5.23	0.00	0.00	0.00	0.29	5.73
Other NW Leicestershire	0.32	4.02	2.78	1.13	0.34	3.59	3.70	0.84	16.72
North West Leicestershire District Total	**15.54**	**30.37**	**42.22**	**20.17**	**30.32**	**55.14**	**34.34**	**22.73**	**250.83**
Elsewhere	19.78	4.02	12.26	9.54	0.71	1.88	1.58	n/a	49.78
TOTAL	**35.33**	**34.40**	**54.48**	**29.71**	**31.03**	**57.02**	**35.92**	**22.73**	**300.60**

Source: *Tables 3 and 4*

Table 9 - Future 2036 convenience goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2036	**37.22**	**36.24**	**57.40**	**31.29**	**32.69**	**60.07**	**37.84**		**292.73**
Main Centres									
Ashby de la Zouch	1.94	13.23	40.81	12.17	11.51	5.83	4.16	9.96	99.60
Coalville	0.22	14.20	0.34	1.47	12.32	46.79	28.11	11.50	114.97
Castle Donington	10.05	0.25	0.17	0.00	0.00	0.00	0.00	0.55	11.03
Ibstock	0.00	0.00	0.00	0.91	7.75	1.68	0.00	0.54	10.88
Co-op, Market Place, Kegworth	3.83	0.07	0.00	0.00	0.00	0.00	0.00	0.21	4.11
Measham	0.00	0.00	0.23	5.51	0.00	0.00	0.00	0.30	6.04
Other NW Leicestershire	0.33	4.24	2.93	1.19	0.36	3.78	3.90	0.88	17.61
North West Leicestershire District Total	**16.38**	**32.00**	**44.48**	**21.25**	**31.94**	**58.09**	**36.17**	**23.94**	**264.24**
Elsewhere	20.84	4.24	12.91	10.05	0.75	1.98	1.66	n/a	52.44
TOTAL	**37.22**	**36.24**	**57.40**	**31.29**	**32.69**	**60.07**	**37.84**	**23.94**	**316.67**

Source: *Tables 3 and 4*

Table 10 - Convenience goods facilities in North West Leicestershire - Main settlements and stores (2018 prices)

Store/Area	Sales floorspace (sq.m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq.m net)	Turnover density (£ per sq.m)	Total Turnover (£m)
Co-op, Derby Road, Ashby-de-la-Zouch	1,168	85%	993	£11,171	£11.09
Co-op, Market Street, Ashby-de-la-Zouch	158	95%	150	£11,171	£1.68
Aldi, Dents Road, Ashby-de-la-Zouch	842	85%	716	£10,542	£7.54
Marks & Spencer Foodhall, Ashby de la Zouch	706	100%	706	£10,313	£7.28
Tesco Extra, Resolution Road, Ashby-de-la-Zouch	6,966	60%	4,180	£13,236	£55.32
B&M Homestore, Ashby Gateway, Ashby-de-la-Zouch	1,406	20%	281	£4,031	£1.13
Other - Ashby de la Zouch	750	95%	713	£6,000	£4.28
Ashby-de-la-Zouch Total	**11,996**		**7,738**		**£88.32**
Asda, Ashby Road, Coalville	793	90%	714	£13,618	£9.72
Co-op, Bridge Road, Coalville (closed 2020)	1,804	85%	1,533	£11,171	£17.13
Co-op, Cropston Drive, Greenhill, Coalville	253	95%	240	£11,171	£2.68
Home Bargains, Belvoir Shopping Centre, Coalville	1,096	20%	219	£3,835	£0.84
Iceland, Bridge Road, Coalville	229	98%	224	£6,645	£1.49
Aldi, Thornborough Road, Coalville	1,082	85%	920	£10,542	£9.70
Co-op, Meadow Lane, Coalville	177	95%	168	£11,171	£1.88
Lidl, Thornborough Road, Coalville	1,104	85%	938	£10,542	£9.89
Morrisons, Whitwick Road, Coalville	4,118	70%	2,883	£12,342	£35.58
Spar, London Road, Coalville	200	95%	190	£8,206	£1.56
B&M Homestore, Whitwick Road, Coalville	2,629	20%	526	£4,031	£2.12
Other - Coalville	750	95%	713	£6,000	£4.28
Coalville Total	**14,235**		**9,268**		**£96.86**
Co-op, Borough Street, Castle Donington	71	95%	67	£11,171	£0.75
Co-op, Station Road, Castle Donington	335	95%	318	£11,171	£3.56
Premier, Huntington Drive, Castle Donington	200	95%	190	£8,000	£1.52
Other - Castle Donington	60	95%	57	£6,000	£0.34
Castle Donington Total	**666**		**633**		**£6.17**
Co-op, Ashby Road, Ibstock	1,032	90%	929	£11,171	£10.38
Other - Ibstock	120	95%	114	£6,000	£0.68
Ibstock Total	**1,152**		**1,043**		**£11.06**
Co-op, Market Place, Kegworth	233	95%	221	£11,171	£2.47
Other - Kegworth	30	95%	29	£6,000	£0.17
Kegworth Total	**263**		**250**		**£2.64**
Co-op, High Street, Measham	230	95%	219	£11,171	£2.44
Tesco Express, High Street, Measham	258	95%	245	£13,236	£3.24
Other - Measham	120	95%	114	£6,000	£0.68
Measham Total	**608**		**578**		**£6.37**
Co-op, Shortheath Road, Swadlincote	335	95%	318	£11,171	£3.56
Co-op, The Green, Thringstone	273	95%	259	£11,171	£2.90
Londis, Whitehill Road, Ellistown	200	95%	190	£6,000	£1.14
Budgens, Bardon Road	130	95%	124	£8,354	£1.03
McColls, Central Road, Hugglescote	132	95%	125	£6,418	£0.80
Co-op, Market Place, Whitwick	335	95%	318	£11,171	£3.56
Other Total	**1,405**		**1,335**		**£12.98**
Total	**30,325**		**20,844**		**£224.41**
Co-op, Hugglescote, Coalville (opened 2020)	243	95%	231	£11,171	£2.58

Source: *Experian Goad Plan May 2017, VOA and ORC Storepoint 2020 and Global Data 2019*

Table 11 - Summary of convenience goods expenditure 2018 to 2036 (£M)

	2018	2021	2026	2031	2036
Available expenditure					
Ashby de la Zouch	80.16	82.74	89.19	94.54	99.60
Coalville	92.54	95.51	102.96	109.14	114.97
Castle Donington	8.87	9.16	9.87	10.47	11.03
Ibstock	8.76	9.04	9.74	10.33	10.88
Kegworth	3.31	3.42	3.68	3.90	4.11
Measham	4.86	5.02	5.41	5.73	6.04
Other	14.18	14.63	15.77	16.72	17.61
Total	**212.68**	**219.51**	**236.63**	**250.83**	**264.24**
Turnover of existing facilities					
Ashby de la Zouch	88.32	88.32	88.32	88.32	88.32
Coalville*	96.86	82.31	82.31	82.31	82.31
Castle Donington	6.17	6.17	6.17	6.17	6.17
Ibstock	11.06	11.06	11.06	11.06	11.06
Kegworth	2.64	2.64	2.64	2.64	2.64
Measham	6.37	6.37	6.37	6.37	6.37
Other	12.98	12.98	12.98	12.98	12.98
Total	**224.41**	**209.86**	**209.86**	**209.86**	**209.86**
Surplus/Deficit expenditure £m					
Ashby de la Zouch	-8.16	-5.58	0.87	6.22	11.27
Coalville	-4.33	13.20	20.65	26.82	32.66
Castle Donington	2.70	2.99	3.70	4.30	4.85
Ibstock	-2.30	-2.02	-1.32	-0.73	-0.18
Kegworth	0.67	0.77	1.04	1.26	1.47
Measham	-1.51	-1.35	-0.96	-0.64	-0.33
Other	1.19	1.65	2.79	3.73	4.63
Total	**-11.73**	**9.65**	**26.77**	**40.96**	**54.37**

Source: Tables 5 to 10

*closue and opening of new smaller Co-op at 2021

Table 12 - Convenience goods floorspace capacity

Area	2021	2026	2031	2036
Turnover Density New Floorspace (£ per sq.m)	£12,000	£12,000	£12,000	£12,000
Sales Floorspace Projection (sq.m net)				
Ashby de la Zouch	-465	72	518	940
Coalville	1,100	1,721	2,235	2,722
Castle Donington	249	309	358	405
Ibstock	-168	-110	-61	-15
Kegworth	64	87	105	122
Measham	-113	-80	-53	-27
Other	137	232	311	386
Total	**804**	**2,231**	**3,414**	**4,531**
Floorspace Projection (sq.m gross)				
Ashby de la Zouch	-665	103	740	1,342
Coalville	1,571	2,458	3,193	3,888
Castle Donington	356	441	511	578
Ibstock	-241	-157	-87	-21
Kegworth	92	124	150	175
Measham	-161	-114	-76	-39
Other	196	332	445	551
Total	**1,149**	**3,187**	**4,877**	**6,473**

Source: *Table 11*

Appendix 2 Comparison goods capacity

Table 1 - Study area population

Zone	2018	2021	2026	2031	2036
Zone 1 - Castle Donington & Kegworth	13,012	13,684	14,706	15,626	16,450
Zone 2 - North of Coalville	11,792	12,401	13,327	14,161	14,907
Zone 3 - Ashby de la Zouch	19,705	20,722	22,270	23,663	24,911
Zone 4 - Measham	10,864	11,425	12,278	13,046	13,734
Zone 5 - Ibstock	11,405	11,994	12,890	13,696	14,418
Zone 6 - Coalville	21,505	22,615	24,304	25,825	27,187
Zone 7 - Whitwick	13,843	14,558	15,645	16,624	17,500
Total	**102,126**	**107,399**	**115,420**	**122,641**	**129,108**

Sources: Experian 2018

North West Leicestershire District - Office of National Statistics 2018 SNPP projections

Table 2 - Comparison goods expenditure per person per annum (£)

Zone	2018	2021	2026	2031	2036
Zone 1 - Castle Donington & Kegworth	3,514	3,357	3,752	4,217	4,798
Zone 2 - North of Coalville	3,562	3,403	3,802	4,273	4,862
Zone 3 - Ashby de la Zouch	3,604	3,443	3,848	4,324	4,920
Zone 4 - Measham	3,330	3,182	3,555	3,996	4,547
Zone 5 - Ibstock	3,395	3,244	3,625	4,074	4,635
Zone 6 - Coalville	3,238	3,093	3,457	3,885	4,421
Zone 7 - Whitwick	2,905	2,775	3,101	3,485	3,965

Sources:

Experian Local Expenditure 2018 (2018 prices) and Retail Planner Briefing Note 18 (October 2020)

Excludes Special Forms of Trading based on Experian adjusted national average for non-retail businesses

Table 3 - Total comparison goods expenditure (£m)

Zone	2018	2021	2026	2031	2036
Zone 1 - Castle Donington & Kegworth	45.73	45.94	55.17	65.89	78.92
Zone 2 - North of Coalville	42.00	42.19	50.67	60.52	72.49
Zone 3 - Ashby de la Zouch	71.02	71.35	85.69	102.33	122.57
Zone 4 - Measham	36.18	36.35	43.65	52.13	62.44
Zone 5 - Ibstock	38.72	38.90	46.72	55.79	66.83
Zone 6 - Coalville	69.64	69.96	84.02	100.33	120.18
Zone 7 - Whitwick	40.21	40.39	48.51	57.93	69.39
Study Area Total	**343.50**	**345.09**	**414.43**	**494.92**	**592.82**

Source: *Tables 1 and 2*

Table 4 - Base year 2018 comparison goods market shares (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow
Main Centres								
Ashby de la Zouch	1.5%	16.0%	39.5%	18.6%	15.3%	5.3%	4.2%	10.0%
Coalville	0.0%	13.9%	1.7%	3.5%	16.9%	33.3%	25.7%	10.0%
Castle Donington	11.7%	0.7%	0.2%	0.0%	0.0%	0.0%	0.2%	5.0%
Ibstock	0.0%	0.6%	0.3%	0.9%	8.1%	1.1%	0.5%	5.0%
Kegworth	2.5%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Measham	0.0%	0.0%	0.8%	6.0%	1.1%	0.9%	0.5%	5.0%
Other North West Leicestershire								
Hugglescote	0.0%	0.0%	0.0%	0.0%	0.1%	0.3%	0.1%	5.0%
Isley Walton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Long Whatton	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Moira	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%	0.0%	5.0%
Packington	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Ravenstone	0.0%	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%	5.0%
Thrigstone	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Whitwick	0.0%	0.9%	0.0%	0.0%	0.0%	0.2%	1.8%	5.0%
North West Leicestershire District Total	**16.3%**	**32.4%**	**42.5%**	**29.0%**	**41.8%**	**41.2%**	**33.0%**	**n/a**
Elsewhere								
Burton-on-Trent	0.4%	1.6%	8.8%	14.2%	3.4%	2.2%	1.7%	n/a
Derby	21.9%	9.3%	4.4%	3.9%	2.9%	0.3%	0.2%	n/a
Leicester	1.8%	12.1%	6.6%	5.7%	23.7%	20.0%	17.5%	n/a
Fosse Shopping Park, Leicester	1.1%	11.6%	2.2%	2.1%	7.8%	11.8%	13.6%	n/a
Loughborough	23.2%	17.2%	1.9%	0.5%	7.1%	12.0%	22.9%	n/a
Nottingham	12.1%	2.3%	5.2%	1.6%	1.3%	1.4%	0.7%	n/a
Tamworth Town Centre	0.0%	3.0%	13.2%	23.9%	6.1%	1.9%	1.0%	n/a
Other	23.2%	10.5%	15.2%	19.1%	5.9%	9.2%	9.4%	n/a
Elsewhere Total	**83.7%**	**67.6%**	**57.5%**	**71.0%**	**58.2%**	**58.8%**	**67.0%**	**n/a**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**n/a**

Source: *NEMS Household Survey July 2018 (weighted results)*

Table 5 - BaseyYear 2018 comparison goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2018	**45.73**	**42.00**	**71.02**	**36.18**	**38.72**	**69.64**	**40.21**		**343.50**
Main Centres									
Ashby de la Zouch	0.69	6.72	28.05	6.73	5.92	3.69	1.69	5.94	59.44
Coalville	0.00	5.84	1.21	1.27	6.54	23.19	10.33	5.38	53.75
Castle Donington	5.35	0.29	0.14	0.00	0.00	0.00	0.08	0.31	6.18
Ibstock	0.00	0.25	0.21	0.33	3.14	0.77	0.20	0.26	5.15
Kegworth	1.14	0.04	0.00	0.00	0.00	0.00	0.00	0.06	1.25
Measham	0.00	0.00	0.57	2.17	0.43	0.63	0.20	0.21	4.20
Other North West Leicestershire									
Hugglescote	0.00	0.00	0.00	0.00	0.04	0.21	0.04	0.02	0.30
Isley Walton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Long Whatton	0.27	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.29
Moira	0.00	0.00	0.00	0.00	0.08	0.07	0.00	0.01	0.15
Packington	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ravenstone	0.00	0.04	0.00	0.00	0.04	0.00	0.00	0.00	0.08
Thrigstone	0.00	0.04	0.00	0.00	0.00	0.00	0.00	0.00	0.04
Whitwick	0.00	0.38	0.00	0.00	0.00	0.14	0.72	0.07	1.31
North West Leicestershire Total	**7.45**	**13.61**	**30.18**	**10.49**	**16.19**	**28.69**	**13.27**	**12.27**	**132.15**
Elsewhere									
Burton-on-Trent	0.18	0.67	6.25	5.14	1.32	1.53	0.68	n/a	15.77
Derby	10.01	3.91	3.12	1.41	1.12	0.21	0.08	n/a	19.87
Leicester	0.82	5.08	4.69	2.06	9.18	13.93	7.04	n/a	42.80
Fosse Shopping Park, Leicester	0.50	4.87	1.56	0.76	3.02	8.22	5.47	n/a	24.40
Loughborough	10.61	7.22	1.35	0.18	2.75	8.36	9.21	n/a	39.68
Nottingham	5.53	0.97	3.69	0.58	0.50	0.97	0.28	n/a	12.53
Tamworth Town Centre	0.00	1.26	9.37	8.65	2.36	1.32	0.40	n/a	23.37
Other	10.61	4.41	10.80	6.91	2.28	6.41	3.78	n/a	45.20
Other Total	**38.28**	**28.39**	**40.84**	**25.69**	**22.54**	**40.95**	**26.94**	**n/a**	**223.62**
TOTAL	**45.73**	**42.00**	**71.02**	**36.18**	**38.72**	**69.64**	**40.21**	**12.27**	**355.77**

Source: *Tables 3 and 4*

Table 6 - Future 2021 comparison goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2021	**45.94**	**42.19**	**71.35**	**36.35**	**38.90**	**69.96**	**40.39**		**345.09**
Main Centres									
Ashby de la Zouch	0.69	6.75	28.18	6.76	5.95	3.71	1.70	5.97	59.71
Coalville	0.00	5.87	1.21	1.27	6.57	23.30	10.38	5.40	54.00
Castle Donington	5.38	0.30	0.14	0.00	0.00	0.00	0.08	0.31	6.20
Ibstock	0.00	0.25	0.21	0.33	3.15	0.77	0.20	0.26	5.18
Kegworth	1.15	0.04	0.00	0.00	0.00	0.00	0.00	0.06	1.25
Measham	0.00	0.00	0.57	2.18	0.43	0.63	0.20	0.21	4.22
Other North West Leicestershire									
Hugglescote	0.00	0.00	0.00	0.00	0.04	0.21	0.04	0.02	0.30
Isley Walton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Long Whatton	0.28	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.29
Moira	0.00	0.00	0.00	0.00	0.08	0.07	0.00	0.01	0.16
Packington	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ravenstone	0.00	0.04	0.00	0.00	0.04	0.00	0.00	0.00	0.09
Thrigstone	0.00	0.04	0.00	0.00	0.00	0.00	0.00	0.00	0.04
Whitwick	0.00	0.38	0.00	0.00	0.00	0.14	0.73	0.07	1.31
North West Leicestershire Total	**7.49**	**13.67**	**30.32**	**10.54**	**16.26**	**28.82**	**13.33**	**12.32**	**132.76**
Elsewhere									
Burton-on-Trent	0.18	0.68	6.28	5.16	1.32	1.54	0.69	n/a	15.85
Derby	10.06	3.92	3.14	1.42	1.13	0.21	0.08	n/a	19.96
Leicester	0.83	5.11	4.71	2.07	9.22	13.99	7.07	n/a	42.99
Fosse Shopping Park, Leicester	0.51	4.89	1.57	0.76	3.03	8.26	5.49	n/a	24.52
Loughborough	10.66	7.26	1.36	0.18	2.76	8.39	9.25	n/a	39.86
Nottingham	5.56	0.97	3.71	0.58	0.51	0.98	0.28	n/a	12.59
Tamworth Town Centre	0.00	1.27	9.42	8.69	2.37	1.33	0.40	n/a	23.48
Other	10.66	4.43	10.85	6.94	2.30	6.44	3.80	n/a	45.40
Other Total	**38.45**	**28.52**	**41.03**	**25.81**	**22.64**	**41.14**	**27.06**	**n/a**	**224.65**
TOTAL	**45.94**	**42.19**	**71.35**	**36.35**	**38.90**	**69.96**	**40.39**	**12.32**	**357.41**

Source: *Tables 3 and 4*

Table 7 - Future 2026 comparison goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2026	**55.17**	**50.67**	**85.69**	**43.65**	**46.72**	**84.02**	**48.51**		**414.43**
Main Centres									
Ashby de la Zouch	0.83	8.11	33.85	8.12	7.15	4.45	2.04	7.17	71.71
Coalville	0.00	7.04	1.46	1.53	7.90	27.98	12.47	6.49	64.85
Castle Donington	6.46	0.35	0.17	0.00	0.00	0.00	0.10	0.37	7.45
Ibstock	0.00	0.30	0.26	0.39	3.78	0.92	0.24	0.31	6.22
Kegworth	1.38	0.05	0.00	0.00	0.00	0.00	0.00	0.08	1.51
Measham	0.00	0.00	0.69	2.62	0.51	0.76	0.24	0.25	5.07
Other North West Leicestershire									
Hugglescote	0.00	0.00	0.00	0.00	0.05	0.25	0.05	0.02	0.37
Isley Walton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Long Whatton	0.33	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.35
Moira	0.00	0.00	0.00	0.00	0.09	0.08	0.00	0.01	0.19
Packington	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ravenstone	0.00	0.05	0.00	0.00	0.05	0.00	0.00	0.01	0.10
Thrigstone	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.05
Whitwick	0.00	0.46	0.00	0.00	0.00	0.17	0.87	0.08	1.58
North West Leicestershire Total	**8.99**	**16.42**	**36.42**	**12.66**	**19.53**	**34.61**	**16.01**	**14.80**	**159.44**
Elsewhere									
Burton-on-Trent	0.22	0.81	7.54	6.20	1.59	1.85	0.82	n/a	19.03
Derby	12.08	4.71	3.77	1.70	1.35	0.25	0.10	n/a	23.97
Leicester	0.99	6.13	5.66	2.49	11.07	16.80	8.49	n/a	51.63
Fosse Shopping Park, Leicester	0.61	5.88	1.89	0.92	3.64	9.91	6.60	n/a	29.44
Loughborough	12.80	8.72	1.63	0.22	3.32	10.08	11.11	n/a	47.87
Nottingham	6.68	1.17	4.46	0.70	0.61	1.18	0.34	n/a	15.12
Tamworth Town Centre	0.00	1.52	11.31	10.43	2.85	1.60	0.49	n/a	28.20
Other	12.80	5.32	13.02	8.34	2.76	7.73	4.56	n/a	54.53
Other Total	**46.18**	**34.26**	**49.27**	**30.99**	**27.19**	**49.40**	**32.50**	**n/a**	**269.79**
TOTAL	**55.17**	**50.67**	**85.69**	**43.65**	**46.72**	**84.02**	**48.51**	**14.80**	**429.23**

Source: *Tables 3 and 4*

Table 8 - Future 2031 comparison goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2031	**65.89**	**60.52**	**102.33**	**52.13**	**55.79**	**100.33**	**57.93**		**494.92**
Main Centres									
Ashby de la Zouch	0.99	9.68	40.42	9.70	8.54	5.32	2.43	8.56	85.64
Coalville	0.00	8.41	1.74	1.82	9.43	33.41	14.89	7.74	77.45
Castle Donington	7.71	0.42	0.20	0.00	0.00	0.00	0.12	0.44	8.90
Ibstock	0.00	0.36	0.31	0.47	4.52	1.10	0.29	0.37	7.42
Kegworth	1.65	0.06	0.00	0.00	0.00	0.00	0.00	0.09	1.80
Measham	0.00	0.00	0.82	3.13	0.61	0.90	0.29	0.30	6.06
Other North West Leicestershire									
Hugglescote	0.00	0.00	0.00	0.00	0.06	0.30	0.06	0.02	0.44
Isley Walton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Long Whatton	0.40	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.42
Moira	0.00	0.00	0.00	0.00	0.11	0.10	0.00	0.01	0.22
Packington	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ravenstone	0.00	0.06	0.00	0.00	0.06	0.00	0.00	0.01	0.12
Thrigstone	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.06
Whitwick	0.00	0.54	0.00	0.00	0.00	0.20	1.04	0.09	1.88
North West Leicestershire Total	**10.74**	**19.61**	**43.49**	**15.12**	**23.32**	**41.34**	**19.12**	**17.67**	**190.41**
Elsewhere									
Burton-on-Trent	0.26	0.97	9.00	7.40	1.90	2.21	0.98	n/a	22.73
Derby	14.43	5.63	4.50	2.03	1.62	0.30	0.12	n/a	28.63
Leicester	1.19	7.32	6.75	2.97	13.22	20.07	10.14	n/a	61.66
Fosse Shopping Park, Leicester	0.72	7.02	2.25	1.09	4.35	11.84	7.88	n/a	35.16
Loughborough	15.29	10.41	1.94	0.26	3.96	12.04	13.27	n/a	57.17
Nottingham	7.97	1.39	5.32	0.83	0.73	1.40	0.41	n/a	18.05
Tamworth Town Centre	0.00	1.82	13.51	12.46	3.40	1.91	0.58	n/a	33.67
Other	15.29	6.35	15.55	9.96	3.29	9.23	5.45	n/a	65.12
Other Total	**55.15**	**40.91**	**58.84**	**37.01**	**32.47**	**59.00**	**38.81**	**n/a**	**322.19**
TOTAL	**65.89**	**60.52**	**102.33**	**52.13**	**55.79**	**100.33**	**57.93**	**17.67**	**512.60**

Source: *Tables 3 and 4*

Table 9 - Future 2036 comparison goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2036	**78.92**	**72.49**	**122.57**	**62.44**	**66.83**	**120.18**	**69.39**		**592.82**
Main Centres									
Ashby de la Zouch	1.18	11.60	48.41	11.61	10.23	6.37	2.91	10.26	102.58
Coalville	0.00	10.08	2.08	2.19	11.29	40.02	17.83	9.28	92.77
Castle Donington	9.23	0.51	0.25	0.00	0.00	0.00	0.14	0.53	10.66
Ibstock	0.00	0.43	0.37	0.56	5.41	1.32	0.35	0.44	8.89
Kegworth	1.97	0.07	0.00	0.00	0.00	0.00	0.00	0.11	2.15
Measham	0.00	0.00	0.98	3.75	0.74	1.08	0.35	0.36	7.25
Other North West Leicestershire									
Hugglescote	0.00	0.00	0.00	0.00	0.07	0.36	0.07	0.03	0.52
Isley Walton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Long Whatton	0.47	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.50
Moira	0.00	0.00	0.00	0.00	0.13	0.12	0.00	0.01	0.27
Packington	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ravenstone	0.00	0.07	0.00	0.00	0.07	0.00	0.00	0.01	0.15
Thrigstone	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.08
Whitwick	0.00	0.65	0.00	0.00	0.00	0.24	1.25	0.11	2.25
North West Leicestershire Total	**12.86**	**23.49**	**52.09**	**18.11**	**27.94**	**49.51**	**22.90**	**21.17**	**228.07**
Elsewhere									
Burton-on-Trent	0.32	1.16	10.79	8.87	2.27	2.64	1.18	n/a	27.22
Derby	17.28	6.74	5.39	2.44	1.94	0.36	0.14	n/a	34.29
Leicester	1.42	8.77	8.09	3.56	15.84	24.04	12.14	n/a	73.86
Fosse Shopping Park, Leicester	0.87	8.41	2.70	1.31	5.21	14.18	9.44	n/a	42.12
Loughborough	18.31	12.47	2.33	0.31	4.75	14.42	15.89	n/a	68.47
Nottingham	9.55	1.67	6.37	1.00	0.87	1.68	0.49	n/a	21.63
Tamworth Town Centre	0.00	2.17	16.18	14.92	4.08	2.28	0.69	n/a	40.33
Other	18.31	7.61	18.63	11.93	3.94	11.06	6.52	n/a	78.00
Other Total	**66.06**	**49.00**	**70.48**	**44.34**	**38.90**	**70.67**	**46.49**	**n/a**	**385.92**
TOTAL	**78.92**	**72.49**	**122.57**	**62.44**	**66.83**	**120.18**	**69.39**	**21.17**	**613.99**

Source: *Tables 3 and 4*

Table 10 - Summary of comparison goods expenditure 2018 to 2036 (£M)

Area	2018	2021	2026	2031	2036
Available expenditure					
Ashby de la Zouch	59.44	59.71	71.71	85.64	102.58
Coalville	53.75	54.00	64.85	77.45	92.77
Castle Donington	6.18	6.20	7.45	8.90	10.66
Ibstock	5.15	5.18	6.22	7.42	8.89
Kegworth	1.25	1.25	1.51	1.80	2.15
Measham	4.20	4.22	5.07	6.06	7.25
Other	2.18	2.19	2.63	3.14	3.77
Total	**132.15**	**132.76**	**159.44**	**190.41**	**228.07**
Projected turnover of existing facilities					
Ashby de la Zouch	59.44	58.52	68.83	78.56	89.31
Coalville	53.75	52.92	62.25	71.04	80.77
Castle Donington	6.18	6.08	7.15	8.16	9.28
Ibstock	5.15	5.07	5.97	6.81	7.74
Kegworth	1.25	1.23	1.44	1.65	1.87
Measham	4.20	4.14	4.87	5.55	6.32
Other	2.18	2.15	2.53	2.88	3.28
Total	**132.15**	**130.11**	**153.03**	**174.66**	**198.58**
Surplus Expenditure (£m)					
Ashby de la Zouch	0.00	1.19	2.88	7.08	13.26
Coalville	0.00	1.08	2.61	6.40	12.00
Castle Donington	0.00	0.12	0.30	0.74	1.38
Ibstock	0.00	0.10	0.25	0.61	1.15
Kegworth	0.00	0.03	0.06	0.15	0.28
Measham	0.00	0.08	0.20	0.50	0.94
Other	0.00	0.04	0.11	0.26	0.49
Total	**0.00**	**2.65**	**6.41**	**15.74**	**29.49**

Source: Tables 5 to 9

Table 11 - North West Leicestershire comparison goods floorspace capacity

	2018	2021	2026	2031	2036
Turnover Density New Floorspace (£ per sq.m)	£6,000	£5,907	£6,948	£7,930	£9,016
Floorspace Projection (sq.m net)					
Ashby de la Zouch	0	202	415	893	1,471
Coalville	0	183	375	808	1,330
Castle Donington	0	21	43	93	153
Ibstock	0	18	36	77	128
Kegworth	0	4	9	19	31
Measham	0	14	29	63	104
Other	0	7	15	33	54
Total	**0**	**449**	**923**	**1,985**	**3,271**
Floorspace Projection (sq.m gross)					
Ashby de la Zouch	0	269	553	1,191	1,962
Coalville	0	244	501	1,077	1,774
Castle Donington	0	28	58	124	204
Ibstock	0	23	48	103	170
Kegworth	0	6	12	25	41
Measham	0	19	39	84	139
Other	0	10	20	44	72
Total	**0**	**599**	**1,231**	**2,647**	**4,361**

Source: Table 10

Appendix 3 Food/beverage capacity

Table 1 - Study area population

Zone	2018	2021	2026	2031	2036
Zone 1 - Castle Donington & Kegworth	13,012	13,684	14,706	15,626	16,450
Zone 2 - North of Coalville	11,792	12,401	13,327	14,161	14,907
Zone 3 - Ashby de la Zouch	19,705	20,722	22,270	23,663	24,911
Zone 4 - Measham	10,864	11,425	12,278	13,046	13,734
Zone 5 - Ibstock	11,405	11,994	12,890	13,696	14,418
Zone 6 - Coalville	21,505	22,615	24,304	25,825	27,187
Zone 7 - Whitwick	13,843	14,558	15,645	16,624	17,500
Total	**102,126**	**107,399**	**115,420**	**122,641**	**129,108**

Sources: Experian 2018

North West Leicestershire District - Office of National Statistics 2018 SNPP projections

Table 2 - Food and beverage expenditure per person per annum (£)

Zone	2018	2021	2026	2031	2036
Zone 1 - Castle Donington & Kegworth	1,355	1,026	1,320	1,408	1,473
Zone 2 - North of Coalville	1,368	1,036	1,333	1,422	1,487
Zone 3 - Ashby de la Zouch	1,351	1,023	1,316	1,404	1,468
Zone 4 - Measham	1,225	927	1,194	1,273	1,331
Zone 5 - Ibstock	1,276	966	1,243	1,326	1,387
Zone 6 - Coalville	1,236	936	1,204	1,285	1,343
Zone 7 - Whitwick	1,086	822	1,058	1,129	1,180

Sources:

Experian Local Expenditure 2018 (2018 prices) and Retail Planner Briefing Note 18 (October 2020)

Table 3 - Total food and beverage expenditure (£m)

Zone	2018	2021	2026	2031	2036
Zone 1 - Castle Donington & Kegworth	17.63	14.04	19.42	22.01	24.23
Zone 2 - North of Coalville	16.13	12.84	17.77	20.13	22.17
Zone 3 - Ashby de la Zouch	26.62	21.20	29.32	33.23	36.58
Zone 4 - Measham	13.31	10.60	14.66	16.61	18.29
Zone 5 - Ibstock	14.55	11.59	16.03	18.16	20.00
Zone 6 - Coalville	26.58	21.16	29.27	33.17	36.52
Zone 7 - Whitwick	15.03	11.97	16.56	18.76	20.66
Study Area Total	**129.86**	**103.39**	**143.01**	**162.07**	**178.44**

Source: Tables 1 and 2

Table 4 - Base year 2018 food and beverage market shares (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow
Main Centres								
Ashby de la Zouch	0.0%	20.7%	65.5%	28.4%	35.3%	9.4%	10.1%	10.0%
Coalville	0.0%	11.7%	0.3%	2.2%	15.4%	42.1%	34.7%	10.0%
Castle Donington	27.1%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Ibstock	0.0%	0.0%	0.0%	0.0%	17.5%	1.0%	1.1%	5.0%
Kegworth	10.4%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Measham	0.0%	0.0%	3.3%	11.9%	1.3%	0.5%	0.0%	5.0%
Other North West Leicestershire	12.6%	22.5%	4.9%	16.8%	5.0%	3.9%	13.1%	5.0%
North West Leicestershire Total	**50.1%**	**57.4%**	**74.0%**	**59.3%**	**74.5%**	**56.9%**	**59.0%**	**-**
Elsewhere								
Loughborough	9.2%	14.3%	0.0%	0.0%	3.9%	13.0%	17.7%	0.0%
Melbourne	0.0%	1.2%	1.9%	0.0%	0.0%	0.0%	2.3%	0.0%
Derby	12.5%	2.7%	1.1%	0.0%	0.0%	4.4%	3.9%	0.0%
Leicester	3.5%	4.4%	0.0%	7.3%	5.8%	15.6%	8.0%	0.0%
Nottingham	4.7%	6.7%	6.5%	0.7%	2.4%	0.0%	0.0%	0.0%
Other	20.0%	13.3%	16.5%	32.7%	13.4%	10.1%	9.1%	0.0%
Elsewhere Total	**49.9%**	**42.6%**	**26.0%**	**40.7%**	**25.5%**	**43.1%**	**41.0%**	**-**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**-**

Source: *NEMS Household Survey July 2018 (weighted results)*

Table 5 - Base year 2018 food and beverage expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2018	**17.63**	**16.13**	**26.62**	**13.31**	**14.55**	**26.58**	**15.03**		**129.86**
Main Centres									
Ashby de la Zouch	0.00	3.34	17.44	3.78	5.14	2.50	1.52	3.75	37.46
Coalville	0.00	1.89	0.08	0.29	2.24	11.19	5.22	1.10	22.01
Castle Donington	4.78	0.31	0.00	0.00	0.00	0.00	0.00	0.27	5.35
Ibstock	0.00	0.00	0.00	0.00	2.55	0.27	0.17	0.16	3.13
Kegworth	1.83	0.10	0.00	0.00	0.00	0.00	0.00	0.10	2.03
Measham	0.00	0.00	0.88	1.58	0.19	0.13	0.00	0.15	2.93
Other North West Leicestershire	2.22	3.63	1.30	2.24	0.73	1.04	1.97	0.00	13.13
North West Leicestershire Total	**8.83**	**9.26**	**19.70**	**7.89**	**10.84**	**15.12**	**8.87**	**5.52**	**86.04**
Elsewhere									
Loughborough	1.62	2.31	0.00	0.00	0.57	3.46	2.66	n/a	10.61
Melbourne	0.00	0.19	0.51	0.00	0.00	0.00	0.35	n/a	1.05
Derby	2.20	0.44	0.29	0.00	0.00	1.17	0.59	n/a	4.69
Leicester	0.62	0.71	0.00	0.97	0.84	4.15	1.20	n/a	8.49
Nottingham	0.83	1.08	1.73	0.09	0.35	0.00	0.00	n/a	4.08
Other	3.53	2.15	4.39	4.35	1.95	2.68	1.37	n/a	20.42
Elsewhere Total	**8.80**	**6.87**	**6.92**	**5.42**	**3.71**	**11.46**	**6.16**	**n/a**	**49.34**
TOTAL	**17.63**	**16.13**	**26.62**	**13.31**	**14.55**	**26.58**	**15.03**	**n/a**	**135.38**

Source: *Tables 3 and 4*

Table 6 - Future 2021 food and beverage expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2021	**14.04**	**12.84**	**21.20**	**10.60**	**11.59**	**21.16**	**11.97**		**103.39**
Main Centres									
Ashby de la Zouch	0.00	2.66	13.88	3.01	4.09	1.99	1.21	2.98	29.82
Coalville	0.00	1.50	0.06	0.23	1.78	8.91	4.15	0.88	17.52
Castle Donington	3.80	0.24	0.00	0.00	0.00	0.00	0.00	0.21	4.26
Ibstock	0.00	0.00	0.00	0.00	2.03	0.21	0.13	0.12	2.50
Kegworth	1.46	0.08	0.00	0.00	0.00	0.00	0.00	0.08	1.62
Measham	0.00	0.00	0.70	1.26	0.15	0.11	0.00	0.12	2.33
Other North West Leicestershire	1.77	2.89	1.04	1.78	0.58	0.83	1.57	0.00	10.45
North West Leicestershire Total	**7.03**	**7.37**	**15.69**	**6.28**	**8.63**	**12.04**	**7.06**	**4.39**	**68.50**
Elsewhere									
Loughborough	1.29	1.84	0.00	0.00	0.45	2.75	2.12	n/a	8.45
Melbourne	0.00	0.15	0.40	0.00	0.00	0.00	0.28	n/a	0.83
Derby	1.75	0.35	0.23	0.00	0.00	0.93	0.47	n/a	3.73
Leicester	0.49	0.57	0.00	0.77	0.67	3.30	0.96	n/a	6.76
Nottingham	0.66	0.86	1.38	0.07	0.28	0.00	0.00	n/a	3.25
Other	2.81	1.71	3.50	3.46	1.55	2.14	1.09	n/a	16.26
Elsewhere Total	**7.00**	**5.47**	**5.51**	**4.31**	**2.95**	**9.12**	**4.91**	**n/a**	**39.28**
TOTAL	**14.04**	**12.84**	**21.20**	**10.60**	**11.59**	**21.16**	**11.97**	**n/a**	**107.79**

Source: *Tables 3 and 4*

Table 7 - Future 2026 food and beverage expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2026	**19.42**	**17.77**	**29.32**	**14.66**	**16.03**	**29.27**	**16.56**		**143.01**
Main Centres									
Ashby de la Zouch	0.00	3.68	19.20	4.16	5.66	2.75	1.67	4.12	41.25
Coalville	0.00	2.08	0.09	0.32	2.47	12.32	5.75	1.21	24.24
Castle Donington	5.26	0.34	0.00	0.00	0.00	0.00	0.00	0.29	5.89
Ibstock	0.00	0.00	0.00	0.00	2.80	0.29	0.18	0.17	3.45
Kegworth	2.02	0.11	0.00	0.00	0.00	0.00	0.00	0.11	2.24
Measham	0.00	0.00	0.97	1.74	0.21	0.15	0.00	0.16	3.23
Other North West Leicestershire	2.45	4.00	1.44	2.46	0.80	1.14	2.17	0.00	14.45
North West Leicestershire Total	**9.73**	**10.20**	**21.70**	**8.69**	**11.94**	**16.66**	**9.77**	**6.08**	**94.75**
Elsewhere									
Loughborough	1.79	2.54	0.00	0.00	0.63	3.81	2.93	n/a	11.69
Melbourne	0.00	0.21	0.56	0.00	0.00	0.00	0.38	n/a	1.15
Derby	2.43	0.48	0.32	0.00	0.00	1.29	0.65	n/a	5.16
Leicester	0.68	0.78	0.00	1.07	0.93	4.57	1.32	n/a	9.35
Nottingham	0.91	1.19	1.91	0.10	0.38	0.00	0.00	n/a	4.50
Other	3.88	2.36	4.84	4.79	2.15	2.96	1.51	n/a	22.49
Elsewhere Total	**9.69**	**7.57**	**7.62**	**5.97**	**4.09**	**12.62**	**6.79**	**n/a**	**54.34**
TOTAL	**19.42**	**17.77**	**29.32**	**14.66**	**16.03**	**29.27**	**16.56**	**n/a**	**149.09**

Source: *Tables 3 and 4*

Table 8 - Future 2031 food and beverage expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2031	**22.01**	**20.13**	**33.23**	**16.61**	**18.16**	**33.17**	**18.76**		**162.07**
Main Centres									
Ashby de la Zouch	0.00	4.17	21.76	4.72	6.41	3.12	1.90	4.67	46.75
Coalville	0.00	2.36	0.10	0.37	2.80	13.97	6.51	1.37	27.47
Castle Donington	5.96	0.38	0.00	0.00	0.00	0.00	0.00	0.33	6.68
Ibstock	0.00	0.00	0.00	0.00	3.18	0.33	0.21	0.20	3.91
Kegworth	2.29	0.12	0.00	0.00	0.00	0.00	0.00	0.13	2.54
Measham	0.00	0.00	1.10	1.98	0.24	0.17	0.00	0.18	3.66
Other North West Leicestershire	2.77	4.53	1.63	2.79	0.91	1.29	2.46	0.00	16.38
North West Leicestershire Total	**11.02**	**11.56**	**24.59**	**9.85**	**13.53**	**18.88**	**11.07**	**6.89**	**107.38**
Elsewhere									
Loughborough	2.02	2.88	0.00	0.00	0.71	4.31	3.32	n/a	13.25
Melbourne	0.00	0.24	0.63	0.00	0.00	0.00	0.43	n/a	1.30
Derby	2.75	0.54	0.37	0.00	0.00	1.46	0.73	n/a	5.85
Leicester	0.77	0.89	0.00	1.21	1.05	5.18	1.50	n/a	10.60
Nottingham	1.03	1.35	2.16	0.12	0.44	0.00	0.00	n/a	5.10
Other	4.40	2.68	5.48	5.43	2.43	3.35	1.71	n/a	25.48
Elsewhere Total	**10.98**	**8.58**	**8.64**	**6.76**	**4.63**	**14.30**	**7.69**	**n/a**	**61.58**
TOTAL	**22.01**	**20.13**	**33.23**	**16.61**	**18.16**	**33.17**	**18.76**	**n/a**	**168.96**

Source: *Tables 3 and 4*

Table 9 - Future 2036 food and beverage expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Inflow	Total
Expenditure 2036	**24.23**	**22.17**	**36.58**	**18.29**	**20.00**	**36.52**	**20.66**		**178.44**
Main Centres									
Ashby de la Zouch	0.00	4.59	23.96	5.19	7.06	3.43	2.09	5.15	51.47
Coalville	0.00	2.59	0.11	0.40	3.08	15.38	7.17	1.51	30.24
Castle Donington	6.57	0.42	0.00	0.00	0.00	0.00	0.00	0.37	7.35
Ibstock	0.00	0.00	0.00	0.00	3.50	0.37	0.23	0.22	4.31
Kegworth	2.52	0.13	0.00	0.00	0.00	0.00	0.00	0.14	2.79
Measham	0.00	0.00	1.21	2.18	0.26	0.18	0.00	0.20	4.03
Other North West Leicestershire	3.05	4.99	1.79	3.07	1.00	1.42	2.71	0.00	18.03
North West Leicestershire Total	**12.14**	**12.72**	**27.07**	**10.84**	**14.90**	**20.78**	**12.19**	**7.58**	**118.22**
Elsewhere									
Loughborough	2.23	3.17	0.00	0.00	0.78	4.75	3.66	n/a	14.58
Melbourne	0.00	0.27	0.70	0.00	0.00	0.00	0.48	n/a	1.44
Derby	3.03	0.60	0.40	0.00	0.00	1.61	0.81	n/a	6.44
Leicester	0.85	0.98	0.00	1.33	1.16	5.70	1.65	n/a	11.67
Nottingham	1.14	1.49	2.38	0.13	0.48	0.00	0.00	n/a	5.61
Other	4.85	2.95	6.04	5.98	2.68	3.69	1.88	n/a	28.06
Elsewhere Total	**12.09**	**9.44**	**9.51**	**7.44**	**5.10**	**15.74**	**8.47**	**n/a**	**67.80**
TOTAL	**24.23**	**22.17**	**36.58**	**18.29**	**20.00**	**36.52**	**20.66**	**n/a**	**186.02**

Source: *Tables 3 and 4*

Table 10 - Summary of food and beverage expenditure 2018 to 2036 (£M)

Area	2018	2021	2026	2031	2036
Available expenditure					
Ashby de la Zouch	37.46	29.82	41.25	46.75	51.47
Coalville	22.01	17.52	24.24	27.47	30.24
Castle Donington	5.35	4.26	5.89	6.68	7.35
Ibstock	3.13	2.50	3.45	3.91	4.31
Kegworth	2.03	1.62	2.24	2.54	2.79
Measham	2.93	2.33	3.23	3.66	4.03
Other	13.13	10.45	14.45	16.38	18.03
Total	**86.04**	**68.50**	**94.75**	**107.38**	**118.22**
Turnover of existing facilities					
Ashby de la Zouch	37.46	38.59	40.56	42.63	44.80
Coalville	22.01	22.68	23.83	25.05	26.33
Castle Donington	5.35	5.51	5.80	6.09	6.40
Ibstock	3.13	3.23	3.39	3.57	3.75
Kegworth	2.03	2.09	2.20	2.31	2.43
Measham	2.93	3.02	3.17	3.34	3.51
Other	13.13	13.52	14.21	14.94	15.70
Total	**86.04**	**88.65**	**93.17**	**97.92**	**102.91**

Source: *Table 6 to 9*

Table 11: Food and beverage floorspace capacity

	2018	2021	2026	2031	2036
Surplus Expenditure (£m)					
Ashby de la Zouch	0.00	-8.77	0.69	4.12	6.66
Coalville	0.00	-5.15	0.41	2.42	3.92
Castle Donington	0.00	-1.25	0.10	0.59	0.95
Ibstock	0.00	-0.73	0.06	0.34	0.56
Kegworth	0.00	-0.48	0.04	0.22	0.36
Measham	0.00	-0.69	0.05	0.32	0.52
Other	0.00	-3.07	0.24	1.44	2.34
Total	**0.00**	**-20.14**	**1.59**	**9.46**	**15.31**
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,152	£5,414	£5,690	£5,981
Floorspace Projection (sq.m gross)					
Ashby de la Zouch	0	-1,702	128	724	1,114
Coalville	0	-1,000	75	425	655
Castle Donington	0	-243	18	103	159
Ibstock	0	-142	11	61	93
Kegworth	0	-92	7	39	60
Measham	0	-133	10	57	87
Other	0	-596	45	254	390
Total	**0**	**-3,910**	**293**	**1,663**	**2,560**

Source: *Table 11*

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