Hinckley & Bosworth Borough Council
HINCKLEY & BOSWORTH BOROUGH RETAIL CAPACITY STUDY

ROGER TYM & PARTNERS
Planners and Development Economists

Final Report - Executive Summary
September 2007

ROGER TYM & PARTNERS

3 Museum Square
Leicester
LE1 6UF

t 0116 249 3970
f 0116 249 3971
e midlands@tymconsult.com

Introduction

1 In March 2007, Hinckley & Bosworth Borough Council commissioned Roger Tym & Partners (RTP) to undertake a retail capacity study to inform the Council's Local Development Framework (LDF) by assessing the role and contribution that Hinckley town centre can make towards meeting future retail needs.

2 The study brief defined a number of 'objectives', including the need to:

- determine the role and function of Hinckley town centre, and its position in the retail hierarchy, by recourse to a 'health check';
- establish the catchment population that Hinckley town centre currently serves, and conduct an analysis of retail patterns;
- assess the current and future need for additional comparison and convenience retail floorspace;
- advise, in broad terms, on the scope for additional provision in the commercial leisure and office sectors; and
- evaluate the merits of alternative locations for meeting identified needs in accordance with the sequential approach.

3 Thus, the purpose of the study is to provide a robust evidence base on the capacity for additional retail development (and, to a lesser extent, commercial leisure as well as office sector uses) in forthcoming years. The Council can then use the findings to inform the preparation of its LDF, and as evidence for determining planning applications.

4 A mix of quantitative and qualitative research was therefore undertaken in the early stages of the study to enable a substantial body of original data on retail and town centre uses to be assembled. This research included a telephone survey of households, which provided a detailed picture of existing shopping and leisure patterns, as well as a range of local consultations and analysis of Hinckley town centre in relation to key performance indicators.

5 In this Executive Summary, we pull together the principal findings from the various lines of research and analysis that informed the study. We also summarise our assessment of potential locations/sites that the Council may wish to consider for accommodating the identified retail needs.

Key Messages from PPS6

6 In our assessment, the provisions of PPS6 reflect the Government's wider emphasis on the need to plan, monitor and manage at both the regional and local planning levels. Perhaps the key change in national policy emphasis arising as a result of PPS6 is the requirement for a much more proactive plan-led approach to planning for town centres through regional and local planning.

7 Strong emphasis continues to be given to the sequential approach; the primary shopping area is the preferred location for new retail floorspace, followed by edge-of-centre locations. PPS6 advocates the use of innovative site layouts, multi-storey development and reduced car parking in order to accommodate developments in central locations. Where growth cannot be accommodated within existing centres, LPAs are to plan for the extension of the primary shopping area, and for the extension of the town centre as a whole to accommodate other main town centre uses.

Regional and Local Planning Policy Context

8 Hinckley is defined as a Sub-Regional Centre in both the approved and the emerging replacement versions of the RSS. Similarly, in both versions of the RSS, Hinckley is located within the Three Cities sub-area, where Nottingham, Derby and Leicester are encouraged to *'develop their pre-eminent roles for the region'*. The emerging RSS advocates '*Appropriate development of a lesser scale'* in the defined Sub-Regional Centres.

9 The adopted Structure Plan covering Hinckley & Bosworth Borough is the Leicester, Leicestershire and Rutland Structure Plan 1996-2016 (LLRSP), adopted in March 2005. The first priority for development is *'previously developed land and buildings within or adjoining the central area of Leicester and the town centres of the Main Towns'.* Hinckley/Earl Shilton is defined as a 'Main Town', one of ten in the LLRSP area.

10 The Hinckley & Bosworth Borough Local Plan was adopted in February 2001, and it therefore pre-dates PPS6, the approved RSS and the LLRSP. Of more interest is the emerging LDF Core Strategy, which identifies Hinckley as a 'Sub-Regional Centre' in accordance with the RSS, and places it at the top of the Borough's hierarchy of settlements. Hinckley is intended to be the main focus for growth and regeneration within the Borough.

11 A Masterplan for Hinckley town centre was published in May 2006, and is consistent with the thrust of PPS6 and regional as well as local planning policy in that it seeks to focus development in the core of Hinckley. Aspirations for eight Strategic Development Areas (SDAs) are set out in the Masterplan. Retail features as a significant element of the proposed land use mix in three of the SDAs – Stockwell Head/Concordia Theatre; Britannia Centre/Castle Street; and the Bus Station area.

12 The Masterplan will inform the production of a specific Hinckley Town Centre Area Action Plan, which will form part of the emerging LDF, providing detailed policies and site allocations to achieve the regeneration of Hinckley town centre.

13 In summary, there is strong policy support for focusing development in the centre of Hinckley, which is the largest centre in the Borough. Nevertheless, in accordance with the requirements of PPS6, the Borough Council should liaise with local communities and other stakeholders in order to identify specific deficiencies at the local level, and consider appropriate measures to address them.

Performance Analysis and Key Qualitative Needs

14 Our analysis of the retail performance of Hinckley town centre involved a combination of on-foot surveys; desk research, benchmarking 'performance' against a range of comparator centres; and face-to-face consultations with representatives of the business and property markets in Hinckley.

15 Overall, we conclude that Hinckley is a healthy town centre. This is evidenced by: Hinckley's significant improvement in the national retail rankings over recent years; reasonably good representation from national multiple retailers; an encouraging level of published retailer requirements for the town; long-term improvements in retail yields; a low level of vacant floorspace, with no particular concentrations of void units in the town centre; and apparently good levels of footfall.

16 Nevertheless, there is room for improvement in a number of key areas. Most notably, the town centre has a limited convenience goods offer. Furthermore, the town centre contains only one department store (Co-Op), which is relatively small by modern standards, and in need of refurbishment. The town centre's fashion

retail offer would also benefit from enhancement, as would the food & drink offer which currently caters for a narrow market.

17 Through primary research undertaken for this study, we have identified a modest level of confirmed interest in Hinckley from a range of prominent comparison and convenience retailers. However, attracting such operators is presently constrained by the lack of available premises of the right size, configuration and trading environment, which indicates a need for new retail floorspace in appropriate locations. We are confident that if/when a significant development scheme was to emerge in the town centre area, then the level of operator demand would increase.

Street-side Survey of Pedestrians

18 The market research firm, NEMS – acting as a sub-consultant to RTP - conducted a face-to-face survey with a random sample of visitors to Hinckley town centre, during April 2007. The survey was undertaken on different days of the week and at different times of the day to ensure a representative sample.

19 The main objective of the pedestrian survey was to establish the postcode origin of respondents, so as to define Hinckley town centre's overall catchment area (OCA). A further important objective was to establish the respondents' reasons for visiting the town centre. We also took the opportunity to ascertain views/attitudes in relation to a limited number of key issues. Some of the key findings are summarised, below.

Aspects Most Liked/Disliked About the Town Centre and Ways to Improve It

20 After 'nothing in particular', which was the top response (33.9 per cent), the proximity and convenience of Hinckley was the next most frequently cited liked feature (by 24.8 per cent of respondents).

21 Over one third of respondents cited the lack of choice of national multiple shops as their main dislike. A further 25.7 per cent of respondents cited the lack of choice of independent/specialist shops, whilst 16.8 per cent considered the quality of the shops to be inadequate. 'Nothing in particular' was the response cited by 19.6 per cent of respondents in Hinckley when asked to name their main dislike.

22 Respondents' suggested improvements for Hinckley town centre reflect the perceived weaknesses identified above. The most frequently suggested improvements were 'more national multiple retailers' (30.3 per cent); 'a better choice of shops in general' (30.0 per cent); and 'better quality shops' (16.2 per cent).

Adequacy of Current Commercial Leisure Facilities

23 Approximately 60 per cent of respondents considered that commercial leisure facilities are inadequate in Hinckley town centre.

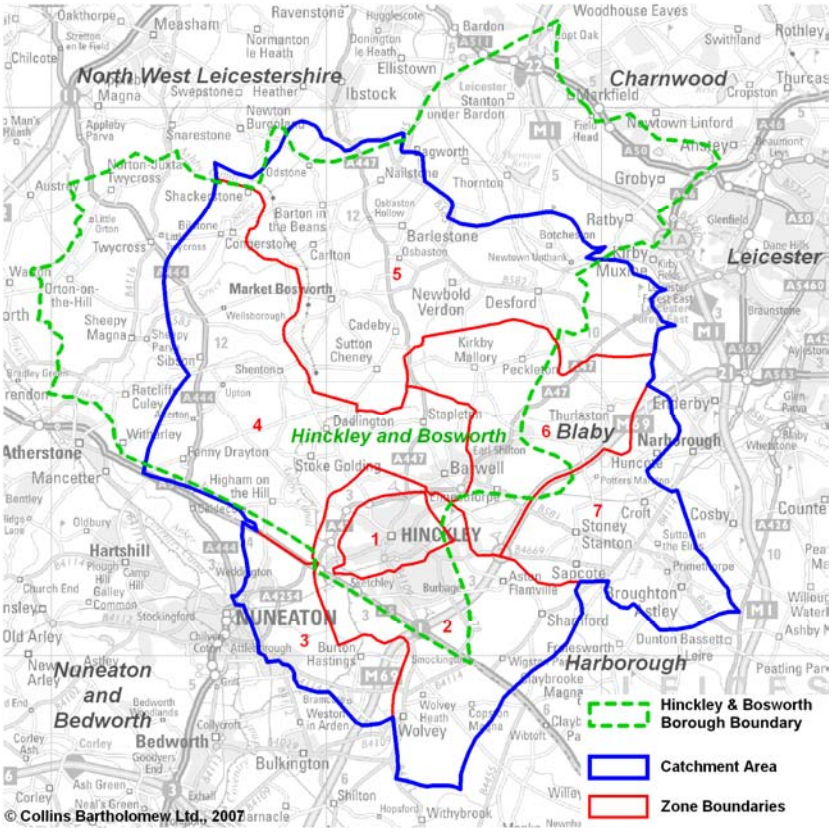
24 With regard to specific weaknesses, the absence of a cinema was – by a large majority – the most common response, with 77.7 per cent of respondents commenting on this perceived gap in Hinckley's leisure offer. Other common responses were the lack of bowling facilities (21.3 per cent) and activities for youngsters (15.4 per cent). Only one per cent of respondents cited the lack of pubs/bars as a key element missing from Hinckley's leisure offer, and only two per cent cited restaurants/cafés as a key omission – although this may in part reflect the fact that the surveys were undertaken in the daytime, when younger people are less likely to use the town centre.

Current Patterns of Retail and Leisure Visits

25 We defined the overall catchment area (OCA) of Hinckley town centre using data on the postcode origin of pedestrian survey respondents. For the purposes of assessing current patterns of convenience (food) and comparison (non-food) spending, we divided the OCA into seven expenditure ‘zones’.

26 The OCA, and its seven constituent zones, is depicted in Figure 1 below. Only OCA zones 1 and 4 are located entirely within Hinckley & Bosworth Borough; the other zones cover parts of Rugby, Blaby, Nuneaton and Bedworth, and Harborough Districts.

Figure 1 Hinckley OCA - Expenditure Zones



27 A comprehensive telephone survey of 1,000 households resident in the seven OCA zones was undertaken in May 2007, by NEMS. The findings are based on a fully representative sample, with a minimum of 100 responding households from each of the seven survey zones shown in Figure 1, and with all results weighted to reflect the actual distribution of households across the catchment area in the year 2004.

28 The survey of households found that:

- town centres, retail parks and individual stores located within Hinckley’s OCA retain, collectively, some 32 per cent of the comparison expenditure of residents of the catchment, which we consider to be a relatively modest level of retention, although this is to some extent expected considering the close proximity of higher-order centres close to, but outside of, the catchment area boundary, and because the OCA only contains one main centre;
- the main outflows (or leakage) of comparison expenditure are to Fosse Park, Leicester (£64.00m), Leicester city centre (£57.09m) and Nuneaton town centre (£52.43m), equating to composite market shares of about 15 per cent, 14 per cent and 13 per cent, respectively;

- town centres and individual foodstores located within the OCA collectively retain some 70 per cent of the convenience expenditure of residents of the catchment, which is a relatively modest level of retention for this type of retail;
- three zones have a convenience goods retention rate of less than 60 per cent, these being zone 5 (57 per cent), zone 7 (49 per cent) and zone 3 (28 per cent). The low retention rates achieved in each of these zones reflects the availability of large convenience stores around Nuneaton, Leicester and Coalville; and
- Hinckley town centre is the prime destination for four of the six leisure activities featured in the questionnaire. However, Nuneaton town centre is the most popular destination for both cinema and theatre trips and family entertainment activities amongst residents in zone 1 (the Hinckley town centre zone) and for residents of the OCA as a whole.

29 In summary, we consider that the proportion of available comparison goods expenditure that is retained within the OCA (32 per cent) is capable of improvement. There may also be scope to increase the OCA's retention of convenience goods expenditure from the current base position of 70 per cent.

Summary of Quantitative Need - Retail

30 As noted above, the household survey identified overall retention rates of 32 per cent (for the comparison sector) and 70 per cent (for the convenience sector); in both cases we consider the rate to be capable of improvement.

31 We thus provide three sets of forecasts for comparison expenditure capacity. The first forecast is based on the maintenance of the existing retention rate (Scenario A). The second is based on an assumed increase of the overall study area retention rate of four percentage points, from the current base position of 32 per cent to a new level of 36 per cent (Scenario B). The third forecast is the most ambitious, being based on an eight percentage point increase in the aggregate retention rate, to a new level of 40 per cent (Scenario C).

32 Similarly, we test two convenience expenditure capacity scenarios, which model the effects of maintaining a constant retention rate throughout the study period (Scenario A), and of increasing the retention rate to a new level of 80 per cent (Scenario B), which is a level of retention that is typically achieved in similar locations elsewhere.

Comparison Floorspace Requirements Arising in the Period to 2021

33 Our quantitative capacity work shows that there is a goods based capacity for additional comparison sector sales floorspace up to 2021 in the range 7,000 sq.m (75,800 sq.ft) net when assessed on the basis of constant market shares (Scenario A), to around 13,100 sq.m (141,250 sq.ft) net based on an assumption that the aggregate retention rate across the OCA could be increased from the current base position of 32 per cent, to a new level of 36 per cent (Scenario B).

34 On the basis of the Scenario C forecast, there would be a goods based capacity for around 15,800 sq.m (170,000 sq.ft) of additional comparison retail sales floorspace up to 2021. However, we consider the Scenario C forecasts to be extremely ambitious. Whilst we consider the current retention rate of 32 per cent to be capable of improvement, we do not consider that it is disastrously low. The OCA contains only one main centre (Hinckley town centre) and is surrounded by higher-order centres, which are themselves likely to expand further. Even to maintain the current retention rate of 32 per cent will require a significant level of new retail floorspace.

35 Hence, we consider that the most realistic scenario to plan for is Scenario B. An increase to the current retention rate of four percentage points is itself ambitious

and will require the development of a considerable amount of new, high-quality retail floorspace, although we consider that it is realistically achievable over time.

Comparison Floorspace Requirements Arising in the Period to 2026

36 In the longer 2007-26 period, the overall comparison retail floorspace requirement range increases to around 13,700 sq.m (147,200 sq.ft) net under Scenario A, to around 21,100 sq.m (226,700 sq.ft) under Scenario B. The floorspace requirements arising under the most ambitious Scenario C are higher still, at around 27,500 sq.m (295,900 sq.ft).

37 Around one third of the comparison retail floorspace requirements identified for the overall study period 2007-26 arise in the post-2021 period, under all three Scenarios. Furthermore, primarily as a consequence of existing retail commitments already in the planning pipeline, no floorspace capacity arises until the post-2011 period. This is shown clearly in summary Table 1.

Table 1 Summary of Goods Based Comparison Retail Floorspace Requirements Arising in the Periods to 2021 and 2026

Floorspace Requirement, sq.m sales area	2007-11	2011-16	2016-21	2007-21	2021-26	2007-26
Constant Market Share (Scenario A)	-2,185	4,072	5,159	**7,046**	6,634	**13,680**
Moderately Rising Retention (Scenario B)	-587	7,443	6,269	**13,125**	7,941	**21,067**
Substantially Rising Retention (Scenario C)	-587	7,443	8,920	**15,776**	11,679	**27,455**

Convenience Floorspace Requirements Arising in the Period to 2021

38 Forecast per capita expenditure increases in the convenience sector are much more modest than in the comparison sector (+0.9 per cent, per annum for convenience, and 4.4 per cent, per annum in the comparison sector). The resultant requirements for further convenience goods floorspace in the periods up to 2021 and 2026 are therefore considerably smaller than in the comparison retail sector. The convenience requirements arising by 2021 are in the range 2,400 sq.m (25,500 sq.ft) net under constant retention Scenario A to 5,300 sq.m (51,100 sq.ft) net under rising retention Scenario B.

Convenience Floorspace Requirements Arising in the Period to 2026

39 In the longer-term period 2007-26, there is scope for around 3,500 sq.m (38,200 sq.ft) under Scenario A, rising to around 6,700 sq.m (72,000 sq.ft) under Scenario B. Thus, as in the comparison sector, a significant proportion of the convenience retail floorspace requirements identified for the overall study period 2007-26 arise in the post-2021 period, under both the 'constant' and the 'rising' retention scenarios.

40 We consider that the Council should plan on the basis of the higher Scenario B figures, which are based on an increase to the level of convenience expenditure retention across the OCA as a whole from around 70 per cent, which is relatively modest for this type of retail, to a new level of 80 per cent.

Table 2 Summary of Goods Based Convenience Retail Floorspace Requirements Arising in the Periods to 2021 and 2026

Floorspace Requirement, sq.m sales area	2007-11	2011-16	2016-21	2007-21	2021-26	2007-26
Constant Market Share (Scenario A)	399	918	1,053	**2,370**	1,183	**3,552**
Rising Market Share (Scenario B)	1,500	2,047	1,760	**5,307**	1,385	**6,691**

Summary of Need - Commercial Leisure and Office Sectors

Commercial Leisure Sector

41 For the purposes of planning for commercial leisure needs, we caution against looking beyond 2021, which is itself a long time period in the commercial leisure sector. In the period to 2021, spending on leisure services in Hinckley's OCA is forecast (using local data and national growth projections) to grow by 28.5 per cent (a gain of £74.6m). How this growth might be expended locally depends very much on what opportunities the market supplies – thus, current spending patterns can only provide a guide to what might happen in the future.

42 On current spending patterns in the catchment, almost half of this spending growth (some £36m) will go to eating and drinking outside the home (restaurants, cafés, take-away outlets and pubs/bars). Capturing a sizeable proportion of this growth in expenditure through the provision of a better and more appealing choice of restaurants, cafés and bars/pubs will be vital to the future health of Hinckley and other smaller centres within the OCA.

43 The rest of the expenditure growth will go to a wide mix of activities, including bingo halls and cinemas, with no single activity capturing any significant market growth. Residents with the OCA have a comparatively good choice of cinemas within a reasonable drive-time (18-25 minutes). Accordingly, we consider that Hinckley – and the OCA more generally – is unlikely to be viewed by the major multiplex operators as a priority location for additional cinema provision. There may, however, be scope for two or three independent cinema screens, or a small multiplex facility. There also appears to be scope for at least one additional neighbourhood bingo club within the OCA, although we do not consider that there is any scope for casino development in the OCA.

44 The approach to the assessment of quantitative need in the leisure sector is less well developed than in the retail sector and so the quantitative 'needs' that we have identified should be treated as an indicative guide. Furthermore, the sector is dynamic, changing and operator-led. If an investor feels capable of attracting customers by diverting spending from other facilities, the planning system does not prevent additional development provided it meets other criteria for vital and viable town centres.

Office Sector

45 The office market across Hinckley & Bosworth Borough as a whole – and Hinckley town centre in particular – is small-scale and predominantly localised. The majority of available premises are in the 0-2,000 sq.ft size band. There is generally a low level of enquiries for office space in Hinckley, with those that do seek space typically having small requirements (up to 2,000 sq.ft).

46 The historic take-up of office space in the town centre has been consistently low and a significant amount of space remains vacant and on the market. This might in part be reflective of the sub-optimal, secondary nature of much of the existing property offer. However, there has been little recent office activity in Hinckley town centre, and town centre rental values remain low, and static.

47 Whilst there are various sites available in the town centre that are physically capable of accommodating new office floorspace, local agents are not convinced that there is sufficient demand to justify such a development. Furthermore, new, good-quality office space is available in various locations outside of the town centre.

Opportunities for Meeting Identified Needs

48 We consider that there is a need for at least one substantial development scheme in order to provide units of the right size, configuration and trading environment to attract the type of retailers that are presently missing from Hinckley's offer.

49 As highlighted above under the heading 'Regional and Local Planning Policy Context', the published Masterplan for Hinckley town centre identifies preferred land uses for some eight Strategic Development Areas (SDAs) in Hinckley, although retail features as a significant element in only three of the SDAs. Below, we summarise our initial assessment of the retail prospects of each of these three SDAs.

Stockwell Head (Masterplan SDA 1)

50 The Stockwell Head SDA is currently edge-of-centre in retail terms and contains a mix of uses including secondary retail, workshops and the underused Stockwell House office block. There is a significant amount of underused land to the rear of Stockwell Head. In our assessment, the Stockwell Head area is therefore in need of regeneration and is of a sufficient size to accommodate large-floorplate retail units. We understand from discussions with local property market agents that the freeholder of Stockwell House may consider selling its site.

51 However, Council officers advise that the Council's transport planning consultants are likely to recommend that the western part of the Stockwell Head SDA should be redeveloped to provide a consolidated town centre car park. We also understand that the Council favours residential for the residual part of the SDA, and that whilst retail might form part of the wider scheme this is likely to be small-scale.

52 In summary, whilst we consider that this substantial site does offer potential for large-floorplate retail units - which is a view that is shared by local property market agents - the Council favours alternative uses for the site and so we conclude that it is unlikely to become available for large-scale retail uses.

Britannia Centre/Castle Street (Masterplan SDA 3)

53 The Masterplan identifies units on either side of Castle Street in the heart of the town centre, together with the surface-level car park to the rear of the northern side of Castle Street, for a mixed-use redevelopment to include retail, commercial and leisure uses. Atkins envisages the creation of a north-south pedestrian route, which would require the clearance of the premises on the north side of Castle Street.

54 According to local property market agents, the leases on many of the Castle Street premises have at least four years to run, with some leases having in excess of seven years left. Nevertheless, we understand that a formal appraisal has not been undertaken to establish whether the redevelopment value would be likely to exceed the value of the existing properties.

55 We consider it likely that, given its location in the heart of the centre, the site would prove attractive to both developers and retailers. If such a scheme was to emerge, then we consider it could attract the type of comparison retailers that are presently missing from Hinckley's comparison retail offer. We see no reason why clothes and shoes floorspace could not form part of the new retail units proposed for the site in the Masterplan. Furthermore, we understand that the new owner of the Britannia Centre is keen to remodel the Centre and add retail floorspace, possibly including some floorspace at upper floor level.

56 In summary, we consider that there is likely to be potential for a redevelopment/ extension of the Britannia Centre, which is ideally located in the heart of the town centre. Serious consideration should be given to the potential for a greater quantum of retail floorspace at the site than the relatively modest 2,000 sq.m

(21,700 sq.ft) envisaged by Atkins, through an intensive multi-storey scheme. Nevertheless, even if an intensive scheme can be designed and realised, we acknowledge that there is likely to be a residual requirement for a significant quantum of additional comparison retail floorspace - over and above the scheme at the Britannia Centre/Castle Street – which will need to be met elsewhere.

Bus Station/Brunel Road (Masterplan SDA 8)

57 The Bus Station/Brunel Road SDA is a large site with clear redevelopment potential. Much of the property fronting Brunel Road is vacant or underused; the bus station is low-grade; and the large surface-level car park appears to be underused.

58 The site is within a number of ownerships. One local property market agent considers that this is likely to mean that the site represents a medium-term option. However, we understand that the Council has resolved to use compulsory purchase powers if necessary, to facilitate a mixed-use scheme at the site.

59 The site is earmarked in the Masterplan for a supermarket rather than comparison goods retail, which does not feature in the approved mix of uses. We consider that if the site did become available for redevelopment, supermarket operators would be more interested in the site than mainstream comparison retailers, which prefer more central locations. In our initial assessment, the site is unlikely to be viewed favourably by a department store operator because of its edge-of-centre location. Moreover, we consider that a department store and fashion retail outlets would be more appropriately located at the Britannia Centre/Castle Street, where they would have the greatest potential to bolster town centre vitality and viability.

60 Nevertheless, as mentioned above, we consider it likely that there will be a residual requirement for a significant quantum of additional comparison retail floorspace, over and above the scheme at the Britannia Centre/Castle Street. Given the absence of any obvious sequentially preferable alternative sites, we consider that comparison retail could form part of the mix of uses for the Bus Station/Brunel Road site, which in our initial assessment offers clear potential for a development anchored by convenience retail.

61 An independent property market agent would be able to advise on whether there is likely to be sufficient market interest for two schemes, each containing a significant comparison retail element (i.e. at the Britannia Centre/Castle Street site as well as the Bus Station/Brunel Road area), and of the preferred timing/sequence of development. At this stage, in advance of detailed agency advice, we would caution against permitting a substantial amount of comparison retail floorspace at the Bus Station/Brunel Road site until the more central Britannia Centre/Castle Street scheme was committed (and preferably implemented).

Site Assessment – Summary of Findings

62 Our headline conclusion is that the Britannia Centre/Castle Street scheme in Hinckley town centre is the best opportunity for material quanta of additional comparison retail floorspace in the Borough. The site is ideally located adjacent to other retail uses in the heart of the town centre and is in need of redevelopment. We understand that the new owner of the Centre is interested in devising an appropriate scheme. Overall, we consider that a scheme at this site, to provide additional comparison retail floorspace in larger units than those that are presently available, would bolster Hinckley's standing in the sub-regional retail hierarchy. We therefore conclude that a scheme at the site should be the Borough Council's number one retail priority.

63 The large area of land to the south west of Hinckley town centre (Bus Station/Brunel Road) is relatively unconstrained physically and offers potential for a significant quantum of retail development. However, in order not to undermine the vitality and

viability of the main town centre area, we would caution against permitting a substantial amount of comparison retail floorspace at the Bus Station/Brunel Road area until the more central Britannia Centre/Castle Street scheme was committed (and preferably implemented).

Monitoring and Review

64 Paragraph 4.1 of PPS6 advises that comprehensive, relevant and up-to-date monitoring is essential to the effective planning and management of town centres. Such monitoring can enable early signs of change in town centres to be identified and appropriate action to be undertaken. Paragraph 4.3 of PPS6 states that the following matters should be kept under regular review:

- the network and hierarchy of centres (at both the regional and local levels);
- the need for further development; and
- the vitality and viability of centres (at the local level).

65 We consider that our quantitative need assessment is robust and, accordingly, we do not anticipate that the Council will have to update the quantitative need exercise in the immediate future. Notwithstanding this, should the Council wish to update the capacity estimates on a more regular basis - for instance, to reflect new permissions – then it has access to all spreadsheets and data electronically.

The Monitoring Framework

66 Our suggested Monitoring Framework is provided in Section 11 of the Main Report. The indicators are mostly quantitative in nature and are therefore likely to be easily obtainable for Hinckley town centre. Other indicators (such as 'quality and mix of services and other uses') are more subjective/qualitative in nature, and will therefore require a degree of judgment. Monitoring of the more qualitative indicators is also likely to require on-foot surveys of the centres, attitudinal surveys of pedestrians, discussions with town centre stakeholders, and so on.

67 For most of the indicators, we suggest an annual monitoring frequency. In this way, the indicators can be monitored at the same time, which will be useful since many of the indicators should not be viewed in isolation. We further suggest that the indicators be monitored at the same time of year if possible, to assist with comparability and compatibility of data.