The Tin Hat Regeneration Partnership LLP

PROPOSED REDEVELOPMENT OF THE BUS STATION/ BRUNEL ROAD SITE, HINCKLEY

RETAIL STATEMENT

ROGER TYM & PARTNERS
Planners and Development Economists

September 2010

ROGER TYM & PARTNERS

3 Museum Square
Leicester
LE1 6UF

t (0116) 249 3970
f (0116) 249 3971
e leicester@tymconsult.com
w

This document is formatted for double-sided printing.

Author/amended by	Date:	Version:
Laura Beech Associate	21.05.10	Draft Report V1 - sent to client for comment
Laura Beech Associate	27.05.10	Draft Report V2 - sent to client for comment
Bernard Greep Associate Partner	21.06.10	Draft Report V3 - sent to client for comment
Bernard Greep Associate Partner	12.07.10	Final Report - sent to client for submission

M9423

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GLOSSARY

Abbreviation	Definition
BREEAM	Building Research Establishment Environmental Assessment Method
Comparison Retail	Non-food Goods
Convenience Retail	Food Goods
GIA	Gross Internal Area
HTCAAP	Hinckley Town Centre Area Action Plan
IGD	Institute of Grocery Distribution
LDF	Local Development Framework
LPA	Local Planning Authority
OCA	Overall Catchment Area
PPG	Planning Policy Guidance
PPS	Planning Policy Statement
RCS	Retail Capacity Study
RTP	Roger Tym & Partners
SDA	Strategic Development Area
THRP	Tin Hat Regeneration Partnership

1 INTRODUCTION AND REPORT STRUCTURE

Introduction

1.1 Roger Tym & Partners (RTP) has prepared this Retail Statement on behalf of our client, the Tin Hat Regeneration Partnership LLP, which is a joint venture between Centenary Ashcroft and Wilson Bowden Developments. The Statement supports our client's outline planning application for the redevelopment of the bus station and adjacent land between Rugby Road and Station Road in Hinckley Town Centre.

1.2 The outline application, which covers access, layout and scale, is for a mixed-use development comprising retail (A1-A3 uses), leisure (D2 uses) and offices (B1a uses), together with all associated infrastructure and plant, public realm, landscaping and servicing. The works also include the provision of a part undercroft/part surface-level public car parking area and a new bus station for the town.

1.3 The Bus Station/Brunel Street site is identified as a priority for redevelopment by the Borough Council in its adopted Core Strategy and the emerging Area Action Plan for Hinckley Town Centre. The site is currently under-used and it has a poor physical environment with virtually no landscaping or public open space. The individual uses within the site do not relate well to one another, and parts of the site are neglected. The site is not fulfilling its potential, therefore, as a gateway into the heart of Hinckley Town Centre. The redevelopment of the site will be critical to the Borough Council's wider regeneration aspirations for the town centre, and it will be fundamental to allow Hinckley to fulfil its role in the sub-regional retail hierarchy.

1.4 The proposed redevelopment scheme therefore involves the regeneration of an under-used area of land with a poor-quality environment, and it will provide a mixed-use development comprising a new food superstore complemented by 18 additional retail units, a bowling alley/family entertainment centre, a cinema, 5 restaurants/cafés, and office floorspace. The scheme will address the long-standing quantitative and qualitative need for additional convenience and comparison floorspace in Hinckley Town Centre, and will provide Hinckley with a much-needed evening economy and commercial leisure sector. Furthermore, the scheme will involve the redevelopment of under-used land, to create an attractive, high quality southern gateway to the town centre.

1.5 The focus of this report is to consider the retail and other town centre uses proposed within the scheme. We thus assess the scheme in relation to the national policy tests for economic development, as set out in PPS4. Policy EC14 of PPS4 sets out the supporting evidence that should accompany planning applications for main town centre uses and requires that:

i) a sequential assessment be undertaken for planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up-to-date development plan (EC14.3); and that

ii) an assessment of impacts be undertaken under Policy EC16.1, for planning applications for retail and leisure developments over 2,500 sq.m gross floorspace, or any other local floorspace threshold set in the development plan process (EC14.4).

1.6 The application site is within the defined Town Centre and is identified in the adopted Core Strategy for major retail-led development, and it is identified as part of the Primary Shopping Area in Appendix 4 to the emerging HTCAAP, which has reached an advanced stage of preparation. The application is therefore 'in accordance with the development plan' and will function as an integral part of the town centre, meaning that a sequential assessment and an impact assessment are not strictly required by Policies EC14 to EC16 of PPS4.

1.7 Nevertheless, for completeness, we consider a range of alternative sites in Section 5 of our Retail Statement, and in Section 6 we assess the impacts associated with the scheme. In Section 4, we also consider the wider impact considerations which should be taken into account when determining planning applications for economic development.

1.8 In preparing the Statement, we have used data and other information from the final report of the Hinckley and Bosworth Borough Retail Capacity Study (RCS), which we completed for the Borough Council in September 2007, and we have updated the data where appropriate.

1.9 In addition to this Retail Statement, the application is accompanied by other supporting information, and the principal documents are listed below. To avoid unnecessary repetition in our Retail Statement, we cross-refer to these other documents wherever appropriate. Thus, for example, we have not undertaken a comprehensive review of national guidance and development plan policy in this Statement, because this is covered in detail by the Planning Statement.

Supporting Document	Produced By
Planning Statement	RTP
Environmental Statement	Clarke Bond
Transportation Statement	White Young Green
Design and Access Statement	TP Bennett Engle
Plans, Elevations and other Drawings	TP Bennett Engle

Structure of the Retail Statement

1.10 The remainder of our Retail Statement is structured as follows:

- in Section 2 we set out the background to the proposed scheme, focusing on the local planning policy context;
- in Section 3 we outline the proposed development and provide a description of the application site;
- in Section 4 we assess the application against the specific considerations for economic development, identified in Policy EC10 of PPS4;
- in Section 5 we consider whether there are any potential sequentially preferable opportunities for major retail-led development;
- in Section 6 we demonstrate that the proposed scheme will not result in any unacceptable impacts on Hinckley Town Centre, or any other defined centre; and
- in Section 7 we provide a summary of our findings.

1.11 All plans, spreadsheets and other supporting material referred to in this report are presented in the separately bound document entitled 'Appendices to the Retail Statement'.

2 BACKGROUND TO THE PROPOSED SCHEME

Introduction

2.1 The concept of redeveloping the application site (which is commonly referred to simply as the ‘Bus Station site’) for a mix of uses has been around for several years. The site was first identified for comprehensive redevelopment in the Hinckley Town Centre Renaissance Masterplan, which was completed by Atkins on behalf of the Council in May 2006. Since then, the site has been the subject of a development brief, a developer competition, and the site is now formally identified in adopted local planning policy and in the emerging Area Action Plan for the Town Centre. In this section, we briefly outline the progress of the site from the 2006 Masterplan to the adopted Core Strategy, and we provide details of the planning policy background against which the proposed scheme has been formulated.

Hinckley Town Centre Renaissance Masterplan (May 2006)

2.2 The Town Centre Masterplan was produced for the Borough Council by Atkins, in association with ABL Cultural Consulting, Social Research Associates and Lambert Smith Hampton. The aim of the Masterplan was to provide a clear vision for the future social, economic and environmental enhancement and development of Hinckley Town Centre over the next 5 to 15 years.

2.3 The Masterplan established seven ‘Strategic Aims’ for Hinckley Town Centre, two of which are particularly relevant to the current application:

> Strategic Aim 3: Enhance Hinckley Town Centre’s image to developers, retailers, residents and visitors by ensuring high quality development on prominent gateway sites into the town centre; and
>
> Strategic Aim 4: Support the development of new leisure and cultural facilities to improve the quality of life and leisure within Hinckley Town Centre, whilst adding value and attractiveness to the town centre.

2.4 The Masterplan identified eight ‘Strategic Development Areas’ within Hinckley Town Centre, one of which is the Bus Station site. The Masterplan explained that the area of land around the bus station is relatively run down, and would benefit from redevelopment to provide a high quality, landmark development. The Masterplan recommended a co-ordinated mixed-use redevelopment of the entire site, to include offices, residential units, a cinema and a supermarket, in addition to other retail floorspace and an enhanced bus station. Redevelopment of the site was identified as a medium-term opportunity, to be undertaken in the period 2008 to 2011.

Hinckley & Bosworth Borough-wide Retail Capacity Study (September 2007)

2.5 In 2007, the Borough Council commissioned RTP to undertake a retail capacity study (RCS) to inform the Council's Local Development Framework (LDF). A key purpose of the study was to assess the role and contribution that Hinckley Town Centre can make towards meeting future retail needs.

2.6 The study was informed by a comprehensive telephone survey of 1,000 households resident in seven zones, which was undertaken in May 2007 by the market research firm, NEMS. Appendix 1 contains a plan of the overall catchment area (OCA) and the seven constituent survey zones used for the household survey. In summary, 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 available to residents of the catchment, which we consider to be a relatively modest level of retention;
- 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 again a relatively modest level of retention for this type of retail; and
- Hinckley Town Centre is the prime destination for four of the six leisure activities featured in the household survey questionnaire. However, Nuneaton Town Centre is the most popular destination for both cinema and theatre trips, and for family entertainment activities.

2.7 The household survey thus identified overall retention rates of 32 per cent (for the comparison sector) and 70 per cent (for the convenience sector); in both cases we considered the rate of retention to be capable of improvement.

2.8 In undertaking the RCS, we produced three sets of forecasts for comparison retail capacity. The first forecast was based on the maintenance of the existing retention rate (Scenario A). The second scenario was based on an assumed increase in 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 was 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).

2.9 Similarly, we tested two convenience retail 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.

2.10 Our quantitative capacity work found 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) when assessed on the basis of constant market shares (Scenario A), to around 13,100 sq.m (141,250 sq.ft) 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). 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 very ambitious and so we recommended to the Council that the most realistic scenario to plan for is Scenario B (an uplift in the comparison retention rate to 36 per cent).

2.11 In the convenience sector, we identified sales area floorspace requirements arising by 2021 in the range of 2,400 sq.m (25,500 sq.ft) under constant retention Scenario A, to 5,300 sq.m (51,100 sq.ft) under rising retention Scenario B. Again, we recommended that the Council should plan for the floorspace requirements arising under Scenario B (an uplift in the convenience retention rate to 80 per cent).

2.12 Given the scale of retail capacity that we identified, we concluded in the RCS that there is a need for at least one substantial development scheme in Hinckley Town Centre, in order to provide units of the right size, configuration and trading environment to attract the type of retailers that are presently missing from the town's offer.

2.13 We reassessed the 'Strategic Development Areas' identified in the Town Centre Masterplan, and found that the Bus Station site has clear redevelopment potential. We concluded that the site should be redeveloped for a mix of uses, anchored by a new foodstore and complemented by comparison retail outlets.

Hinckley Bus Station Development Brief (November 2007)

2.14 Following the recommendations of the Masterplan and the RCS, the Borough Council prepared a Development Brief for the Bus Station site. The Development Brief explained that the Council is seeking a 'flagship, comprehensive proposal for the redevelopment of the Bus Station site'.

2.15 More specifically, the Development Brief stated that the Council's objectives are, 'to provide an opportunity for additional quality convenience retail development as well as ancillary comparison retail, residential uses, a multi-screen 5 to 7 screen cinema, and associated other leisure uses'. The Development Brief also explained that the mixed-use development of the site should be of high quality, 'through the creation of a landmark development at a key entrance to the town', and that it should, 'achieve high quality public realm improvements linked to the town centre pedestrian preference area'.

2.16 Based on the requirements of the Development Brief, the Council launched a two-stage selection process to choose a developer consortium to take the Council's vision for the Bus Station site forward. Our client, the Tin Hat Regeneration Partnership, was subsequently selected by the Council to deliver the mixed-use redevelopment of the site.

2.17 The proposed scheme has thus been formulated specifically to meet the Council's aspirations for the Bus Station site, as set out in the Development Brief, and is supported by the evidence presented in the Masterplan and the RCS.

Core Strategy

2.18 The Core Strategy for Hinckley & Bosworth was adopted in December 2009, and provides the overarching strategy and core policies to guide the future development of the Borough in the period up to 2026.

2.19 The Core Strategy explains that Hinckley is currently under-performing as a sub-regional town centre due to a number of factors including lack of investment, poor quality public realm, a low retail and cultural offer, vacant property, and limited night-time economy. Due to these factors, the town centre is currently losing business to nearby surrounding centres, primarily Fosse Park, Leicester City Centre and Nuneaton Town Centre. In order to address these issues, Spatial Objective 2 of the Core Strategy is to 'deliver the regeneration of Hinckley Town Centre, as a vibrant, thriving sub-regional centre, which provides opportunities for retail, leisure and commercial activities'. Paragraph 4.16 of the Core Strategy further explains that new retail development is required to revitalise the shopping offer, and a new cinema and associated leisure uses are needed to add a leisure dimension to the town centre.

2.20 Policy 1 ('Development in Hinckley') then goes on to specifically identify the application site as a key opportunity to meet the future retail needs of the Borough. Policy 1 states that - to support Hinckley's role as a sub-regional centre - the Council will:

> 'support the development of approximately 21,100 sq.m (net) of new comparison sector sales floorspace (13,100 sq.m by 2021 and 8,000 sq.m from 2021 – 2026), primarily located in a redeveloped Britannia Centre and on the <u>bus station redevelopment site</u> and the development of an additional 5,300 sq.m (net) up to 2021 of convenience floorspace, primarily located on the <u>bus station redevelopment site</u>'. (Our emphasis added.)

2.21 The application site is, therefore, identified for major retail redevelopment in the adopted Core Strategy for the Borough. This follows on from and is consistent with the Council's evidence base including, in particular, the findings from the RCS, which are summarised earlier in this section. In order to set the context for the remainder of this Retail Statement, it is worthwhile explaining why the Bus Station site was chosen as the most appropriate location for delivering the scale of retail and leisure needs that have been identified.

2.22 The evidence base confirms that although Hinckley is generally a healthy town centre, the convenience and comparison goods offer is not as strong as it should be for a sub-regional centre. Furthermore, the town centre's food & drink offer does not have enough family-friendly restaurants and the town centre does not have a cinema or family entertainment centre. As a result, more than two thirds of the comparison expenditure available within Hinckley's catchment area is spent in other town and city centres and at Fosse Park, almost a third of the available convenience expenditure also leaks from the area, and the town centre's leisure offer/evening economy – which is also critically important to the overall success of a town centre - currently serves a narrow market.

2.23 Accordingly, the evidence base identifies the need for around 13,100 sq.m of additional comparison retail sales floorspace in the town centre by 2021 along with a new, high-quality food superstore and a range of new restaurants and other leisure facilities. The evidence base recognises the importance of providing the scale of provision to deliver the desired benefits which, as well as the retail and leisure needs described above, includes the need to provide a new town centre bus station and a new public car park. Indeed, the seventh bullet of Core Strategy Policy 1 states that the Council will 'Support the provision of a new bus station plus efficient provision and management of town centre car parking and transport to reflect Hinckley's role as a sub regional centre.'

2.24 An extensive assessment of potential sites was undertaken at the evidence base stage. This led to the identification of the Bus Station site as the key town centre opportunity capable of delivering a scheme with the critical mass to secure the Core Strategy's objectives in a single and comprehensive development. Of all the sites that were considered, the Bus Station site is the only realistic opportunity for delivering a new food superstore alongside new comparison retail facilities, food & drink outlets and a cinema/family entertainment centre, together with a new bus station and associated car parking.

2.25 As well as being capable of providing the necessary critical mass described above, the Bus Station site is also integrated into the town centre, thereby providing the opportunity to create a fully functioning retail circuit and linkages with other parts of the town centre, as well as pedestrian, cycling and public transport advantages.

Hinckley Town Centre Area Action Plan

2.26 Consultation on the Proposed Submission version of the Hinckley Town Centre Area Action Plan (HTCAAP) is taking place during June and July 2010, following which it will be examined in public. The emerging HTCAAP has thus reached a relatively advanced stage and should therefore also be afforded some weight.

2.27 The HTCAAP sets out eight Spatial Objectives for Hinckley Town Centre, several of which are particularly relevant to the proposed scheme, namely the objectives to:

- Increase and improve the range of retail provision in the town centre to support Hinckley's role as a sub-regional centre (Spatial Objective 3).
- Enhance Hinckley Town Centre's image to developers, retailers, residents and visitors by ensuring high quality, well-designed, environmentally friendly development in the town centre (Spatial Objective 4).
- Support the development of new leisure and cultural facilities to improve the quality of life and leisure within Hinckley Town Centre, whilst adding value and attractiveness to the town centre to encourage active recreation (Spatial Objective 5).
- Promote Hinckley Town Centre as part of a wider tourism initiative and to develop the evening economy (Spatial Objective 6).
- Retain and enhance employment opportunities in Hinckley Town Centre (Spatial Objective 8).

2.28 The emerging HTCAAP goes on to identify nine Strategic Development Areas within Hinckley Town Centre, one of which is the application site. The HTCAAP explains in paragraph 8.42 that the Bus Station site is well-suited in terms of its location for a new development to provide a mix of retail, leisure and commercial uses. Proposed Policy 9 then specifies the Council's key aspirations for the site's redevelopment, which are to:

- provide an enhanced bus station and associated passenger facilities;
- create an exciting landmark development at this key gateway site;
- provide a mixed-use scheme anchored by a food superstore, with other potential uses including office/commercial floorspace, cafés, restaurants, comparison retail units, a cinema and other leisure uses;
- achieve high quality public realm improvements including improved pedestrian connectivity within the site and to other parts of the town centre;
- improve links to Hinckley railway station; and
- provide a consolidated car park of approximately 560 spaces.

2.29 The 'Potential Land Use Table' (page 41 of the emerging HTCAAP) sets out the indicative quantum and appropriate mix of uses which could come forward at each of nine 'Strategic Development Areas'[1] by the end of the plan period (2026). The Bus Station is identified for 2,000 to 3,000 sq.m of office floorspace, 8,000 to 9,000 sq.m of comparison retail floorspace and 8,500 sq.m of convenience retail floorspace. In relation to the latter figure, we note that the Monitoring Framework (page 59) identifies a target of '5,300 sq.m (net) convenience retail floorspace' by 2026. We therefore assume that the 8,500 sq.m figure is a typing error and that it is the lower figure (5,300 sq.m) which should feature in the Potential Land Use Table.

2.30 Overall, it is clear that the proposed development is fully in line with the Council's aspirations for the Bus Station site, as set out in both adopted and emerging local planning policy, which are focused around major retail development with complementary leisure uses alongside a new bus station and improved car parking facilities. As we show in Section 3, in addition to providing the mix of uses sought by the Council, the amount of retail floorspace that is proposed at the Bus Station site accords with the floorspace figures identified for the site, as described above.

Summary

2.31 The Borough-wide RCS identified a quantitative need for up to 13,100 sq.m of comparison sales floorspace, and 5,300 sq.m of convenience sales floorspace, in the period up to 2021. These retail capacity figures have been adopted by the Council in its Core Strategy and also form the basis for the emerging HTCAAP. As well as new retail development which is required to revitalise the shopping offer and capture some of the expenditure that presently leaks out of the Borough, the Core Strategy identifies a need for a new cinema and associated leisure uses in order to add a leisure dimension to the town centre. The Core Strategy also advocates the provision of a new town centre bus station and new public car parking facilities. All of this will bolster Hinckley's role as a sub regional centre.

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[1] More detail on the Strategic Development Areas is provided in Section 5 of this Retail Statement.

2.32 Following an extensive assessment of potential sites, the Bus Station site was chosen by the Council as the key town centre opportunity capable of delivering a scheme with the critical mass to secure the Core Strategy's objectives in a single and comprehensive development. Accordingly, the Council prepared a Development Brief for the site and selected a developer (the applicant) to deliver a high quality mixed-use scheme. The proposed development has been specifically designed to deliver the Council's key policy objectives for the site, by significantly improving the range of retail and commercial leisure provision alongside a new bus station and significantly improved parking facilities for the town centre.

3 DETAILS OF THE APPLICATION SITE AND THE PROPOSED SCHEME

Site Location

3.1 Page 94 of the Hinckley & Bosworth Core Strategy states that the Local Plan Proposals Map will continue to remain 'saved' as part of the Development Plan until it is replaced by future Development Plan Documents.

3.2 The application site is located wholly within the Town Centre Boundary as defined on the Local Plan Proposals Map. Whilst part of the site is designated as 'Other Shopping Area', the nearest Primary Shopping Frontage – as defined on the Local Plan Proposals Map – is approximately 180 metres to the north of the site (along Castle Street). Trinity Lane, Regent Street and Station Road are all defined as Secondary Shopping Frontage on the Local Plan Proposals Map; these designations extend to the northern boundary of the application site. Accordingly, the application site is currently edge-of-centre in the context of Annex B of PPS4, which defines edge-of-centre as:

> 'For retail purposes, a location that is well connected to and within easy walking distance (i.e. up to 300 metres) of the primary shopping area. For all other main town centre uses, this is likely be within 300 metres of a town centre boundary.'

3.3 However, as we explained in Section 2, the adopted Core Strategy identifies the Bus Station site as one of the two principal locations for substantial new comparison retail development, and the most appropriate location for meeting identified convenience retail needs. This is carried through into the emerging HTCAAP, which identifies the Bus Station site for a mixed-use, retail-led development anchored by a food superstore. Thus, while the site is presently 'edge-of-centre' in PPS4 terms, it is close to existing retail and town centre uses and it incorporates the town centre bus station and public car parking facilities, meaning that pedestrian linkages between the site and other parts of the town centre are already well-established. The site therefore offers clear potential to function as an integral part of the town centre, which explains why the site is identified as part of the Primary Shopping Area in Appendix 4 to the emerging HTCAAP.

Site Description

3.4 The Design and Access Statement and Section 2 of the Planning Statement contain a comprehensive description of the application site, and Schedule 1 in Appendix 2 of the Appendices volume which accompanies this Retail Statement details the existing uses at the site. In broad terms the main occupiers and land uses include:

- the town centre bus station, which is situated within the northern part of the site;
- Sainsbury's and Iceland supermarkets, located centrally within the site;
- three surface-level pay & display public car parks, which provide a total of 290 parking spaces;
- the Hinckley Squash Rackets Club;

- a range of commercial and industrial premises, many of which are low grade; and
- various other uses including 13 small lock-up garages, two vehicle repair centres, a St John Ambulance station, the Hinckley Times offices, an air training corps/army cadet centre, a small shop selling model-making equipment and another shop that sells party equipment, a furniture warehouse, the Venue nightclub, a Thai restaurant and a dry-cleaners.

3.5 Although parts of the site are currently in active use, the site is generally under-used and the condition of the building stock and physical environment is poor, with several derelict buildings and other low-grade properties. The individual uses within the site do not relate well to one another, and the site would clearly benefit from comprehensive redevelopment to make more efficient use of land in a highly sustainable town centre location.

3.6 For the purposes of this Statement, it is important to take account of the quantum and turnover of the existing retail floorspace on the site, which will be factored into our impact assessment, as presented in Section 6. The site currently provides a relatively limited retail offer, comprising the Sainsbury's and Iceland supermarkets, the model-making and party shops, the furniture warehouse and the dry-cleaners. We have measured the gross floorspace of each of these units using Promap, and have estimated the quantum of sales floorspace, based on our site survey work and the use of typical net to gross ratios for different categories of retail. We have also estimated the likely turnover of each of the units, based on benchmark sales densities which we have derived from Verdict.

3.7 Our assessment of each existing unit at the application site is set out in full in Schedule 2 in Appendix 2. In total, the site currently contains 4,346 sq.m of gross A1 floorspace, which provides 1,137 sq.m of convenience sales floorspace, 1,229 sq.m of comparison sales floorspace, and 100 sq.m of retail services floorspace. We estimate that the existing comparison retail offer at the site has an annual turnover of £2.3m, with the existing convenience retail floorspace achieving an estimated annual turnover of £9.7m.

The Proposed Development

The Opportunity

3.8 The Borough Council recognises that the application site provides a key opportunity to strengthen Hinckley Town Centre so that it better serves its hinterland and maintains its role as a sub-regional centre. The proposed development at the application site offers clear potential to help realise these objectives by:

- making more efficient use of previously developed land located in a highly sustainable location;
- expanding the town centre's shopping area through the provision of modern retail accommodation that will attract new shops and services to Hinckley, thereby providing greater choice for the Borough's residents;
- providing key leisure facilities and attractions that are currently lacking within the town centre;

- enhancing key public transport infrastructure and providing better links between the Bus Station site and the rest of the town centre; and
- significantly improving the physical appearance of the site, its relationship with surrounding land uses and the southern approaches to the town centre.

The Proposed Uses

3.9 The application scheme has been designed to deliver a major enhancement of the retail and commercial leisure offer in Hinckley Town Centre. The proposed development will comprise a vibrant mixture of retail, leisure and office uses together with a new bus station and a new, single-level undercroft car park. The scheme will be anchored by a new food superstore together with 18 comparison retail units, complemented by a range of restaurants, cafés, offices, a multi-screen cinema and a bowling alley/family entertainment centre.

3.10 The scheme will provide 27 new-build units in four blocks, labelled A, B, C and D on Drawing E1012 /P021_ Proposed Building Block Plan[2], with a total combined floorspace of 271,440 sq.ft (25,218 sq.m) gross internal area (GIA). Full details of the proposed scheme – specifying the gross floorspace of each unit – are provided in Schedules 3a and 3b in Appendix 2, and are summarised in Table 3.1 below. In brief:

- The largest unit (Block A, Unit A1), with a GIA of 104,140 sq.ft (9,675 sq.m), will be the food superstore, which will contain a mix of convenience and comparison retail floorspace.
- The superstore will be complemented by 18 non-food retail units (Block A – Units A2 to A7 and Units A9 to A11, and Block C - Units C1 to C9), of varying sizes, with a combined GIA of 105,094 sq.ft (9,764 sq.m).
- A further 5 units (Block B, Units B1 to B5), with a combined GIA of 15,651 sq.ft (1,454 sq.m), will be occupied by restaurant and café outlets (Use Class A3).
- Office floorspace (Use Classes B1 and/or A2) will be provided in Unit D1, and has a GIA of 7,600 sq.ft (706 sq.m).
- The remaining two units (Block C – Unit C10 and Block A – Unit A8), which together have a GIA of 38,955 sq.ft (3,619 sq.m), will provide a bowling alley and a five-screen cinema.

3.11 In Schedules 3a and 3b in Appendix 2 and in Table 3.1 below, we also provide an indication of the net sales floorspace of each of the retail units, which we use later in our Retail Statement to identify the likely retail turnover of the scheme. However, since tenants have not yet been secured for all of the units, it is not possible to provide a definitive breakdown of turnover and sales floorspace. The turnover and sales floorspace figures cited in this statement should thus be treated as indicative estimates at this stage.

3.12 As such, we have assumed that the food superstore will have a net to gross ratio of 65 per cent, which is typical for large foodstores, and that 67 per cent of the sales area

[2] Block D consists of a single unit and adjoins Block A.

floorspace will be used for the sale of convenience goods, with the remaining 33 per cent of the sales area floorspace used for the sale of non-food items (which is again typical for food superstores)[3]. Based on these assumptions, the foodstore will provide 45,353 sq.ft (4,213 sq.m) of convenience sales floorspace, and 22,338 sq.ft (2,075 sq.m) of comparison sales floorspace. We have assumed that the 18 non-food units will have a net to gross ratio of 70 per cent, and will therefore provide a total of 73,566 sq.ft (6,834 sq.m) comparison sales floorspace. The quantum of retail sales floorspace proposed in this application is, therefore, fully in line with the requirements specified for the Bus Station site in the adopted Core Strategy and the emerging HTCAAP.

3.13 Although we cannot name specific operators at this stage, it is anticipated that the foodstore will by operated by one of the 'big four' food superstore operators[4], and that the 18 comparison retail units will be occupied by a range of leading names currently absent from Hinckley, including high-profile fashion retailers and homeware stores. Similarly, negotiations with potential tenants of the five food and drink units are ongoing but the intention is for these units to be occupied by family friendly restaurants and cafés. The operators of the bowling alley and the multiplex cinema will also be leading names.

3.14 Vehicular access to the food superstore will be from Rugby Road and 546 car parking spaces will be provided in an undercroft car park, beneath the store. Full details are provided in the Transportation Statement.

Table 3.1 – Summary of Proposed Floorspace

Use Class	Use	GIA Floorspace (sq.m)	Indicative Sales Floorspace (sq.m)
A1	Superstore – Convenience Retail	6,482	4,213
A1	Superstore – Comparison Retail	3,192	2,075
A1	18 x Comparison Retail Units	9,764	6,834
	Total Retail	19,438	13,123
A3	Total Restaurants & Cafés	1,454	
	Total Restaurants & Cafés	1,454	
B1/A2	Financial & Professional Services	706	
	Total Offices	706	
D2	Bowling Alley/Family Entertainment Centre	1,526	
D2	Cinema	2,093	
	Total Leisure	3,619	
	Total All Uses	25,218	

[3] As confirmed by analysis of data in 'UK Food & Grocery Retailers 2009' (Verdict Research), which specifies the amount of non-food floorspace in stores as a proportion of total store floorspace. Verdict's figures are the average for the company and will therefore vary by format.

[4] Given the size of the proposed foodstore, it will certainly be occupied by one of the 'big four' supermarket operators (i.e. Sainsbury's, Tesco, Morrisons or Asda). Accordingly, our assumptions regarding the net to gross ratio of floorspace, the split between convenience and comparison provision, and the turnover of the store, are all derived through analysis of the average provision and performance of these four operators.

Design, Townscape and Public Realm

3.15 The application scheme will transform the public realm in the south western part of the town centre by rejuvenating a poorly maintained area of land with deteriorating public realm and delivering a high-quality, landmark development at a gateway site. The Design and Access Statement and other illustrative material produced by TP Bennett Engle explain the scheme's design, townscape and public realm principles, which include:

- a dynamic 'crescent' adjacent to the new bus station, forming a modern and exciting new pedestrian link with Station Road and Regent Street in an arc route, lined by exciting new restaurants/cafés and shops;
- buildings designed by award winning architects using a palette of high-quality materials;
- new public spaces and pedestrian areas, again using attractive materials complemented by street furniture and planting;
- improved connectivity with Market Place and other parts of the town centre; and
- enhanced townscape and a new 'gateway' into the town centre.

3.16 In addition, a replacement bus station, providing modern and more comfortable passenger waiting facilities, will be provided as part of the development. All of this will considerably improve the vitality and viability of the town centre.

Summary

3.17 The application site comprises 3.5 ha of underused land, in a gateway location in the south-western part of Hinckley Town Centre. The site is located directly adjacent to existing secondary shopping frontages along Rugby Road and is edge-of-centre for the purposes of the PPS4 sequential test, although the proposed development is expected to function as an integral part of the town centre and the site is identified as part of the Primary Shopping Area in the Appendices to the emerging HTCAAP.

3.18 The proposed scheme will deliver around 25,200 sq.m of new floorspace, including a new food superstore, 18 comparison retail units, a cinema, a bowling alley/family entertainment centre, several cafés and restaurants, and new commercial office space. The scheme will provide high quality, well-configured units to attract new retailers and commercial leisure operators to Hinckley, which are required in order to address the current deficiencies in the town centre offer and stem the persistent leakage of expenditure to destinations outside of the Borough. The scheme will also integrate with the wider town centre and improve accessibility for both public transport and walking and cycling, both around and within the town centre.

3.19 Accordingly, the proposed development will deliver a high-quality mix of retail, leisure and complementary uses at this key town centre site, consistent with the vision for the site that is set out in the adopted Core Strategy and in the emerging HTCAAP.

4 ECONOMIC DEVELOPMENT CONSIDERATIONS

Requirements of PPS4

4.1 PPS4 explains in paragraph 9 that the Government's overarching objective is sustainable economic growth. PPS4 takes a wide-ranging and positive view of economic development and Policy EC2 advises regional planning bodies and local planning authorities (LPAs) to plan for sustainable economic growth.

4.2 Similarly, in relation to development management, Policy EC10.1 states that, 'local planning authorities should adopt a positive and constructive approach towards planning applications for economic development. Planning applications that secure sustainable economic growth should be treated favourably'. The proposed scheme will boost the vitality and viability Hinckley Town Centre, and deliver a range of economic benefits for the Borough as a whole.

4.3 Policy EC10.2 then goes on to specify five impact considerations that any planning application for economic development must be assessed against, as follows:

- whether the proposal has been planned over the lifetime of the development to limit carbon dioxide emissions, and minimise vulnerability and provide resilience to, climate change;
- the accessibility of the proposal by a choice of means of transport including walking, cycling, public transport and the car, the effect on local traffic levels and congestion (especially to the trunk road network) after public transport and traffic management measures have been secured;
- whether the proposal secures a high quality and inclusive design which takes the opportunities available for improving the character and quality of the area and the way it functions;
- the impact on economic and physical regeneration in the area including the impact on deprived areas and social inclusion objectives; and
- the impact on local employment.

4.4 Detailed explanations of the sustainability, accessibility, design, employment and regeneration benefits of the scheme are provided in other supporting material which accompanies the application, prepared by specialist consultants. However, for completeness and to demonstrate full compliance with PPS4, we summarise, below, the key findings from the aforementioned support material in relation to each of the Policy EC10.2 criteria.

Carbon Dioxide Emissions and Climate Change

4.5 The proposed development will support all of the key objectives and the locational strategy of PPG13 by providing significant new retail and leisure uses in a town centre location immediately adjacent to the town's bus station. The scheme's siting will therefore maximise opportunities to access key services using public transport.

4.6 A new town centre bus station will be provided as part of the development, consistent with paragraph 48 of PPG13 which encourages the location of interchange points close to travel generating uses. As we have explained, the proposed development will bolster Hinckley's role as a defined Sub-Regional Centre and thereby reduce the need for residents within the town's catchment to travel to more distant locations such as Leicester City Centre and Fosse Park to access retail and leisure facilities. This will clearly have beneficial impacts in terms of carbon dioxide emissions.

4.7 The Tin Hat Regeneration Partnership is committed to delivering sustainable development, and it has a target of achieving a BREEAM rating of 'very good' across the scheme, with the aspiration of achieving a rating of 'excellent' for the proposed offices. In order to achieve these targets, various measures are proposed including:

- maximising the use of passive energy, through the careful orientation and design of facades, and by optimising the use of sunlight and natural ventilation;
- the use of sustainably sourced materials which are capable of long-term maintenance and sympathetic repair;
- the efficient use of energy and resources and the implementation of a site waste reduction programme; and
- the incorporation of low carbon technologies.

4.8 Further details of the measures that are proposed for minimising carbon emissions and impact on climate change are provided in the Transportation Statement, the Town Centre Energy Statement and the Design and Access Statement, as well as other support material.

Accessibility

4.9 As we explain above, and in greater detail in the Planning Statement, the co-location of significant new retail and leisure uses alongside a new bus station, close to existing shops/services and other town centre uses, is fully in accordance with the locational strategy of PPG13. The scheme will reduce the need to travel and will maximise opportunities to access key services using public transport, thereby enhancing consumer choice and promoting social inclusion.

4.10 Much more detail on the specific measures that are proposed for encouraging trips by non-car modes, and ensuring safe and easy access to the site for all users, are set out in other support material including, principally, the Transportation Statement and the Design and Access Statement.

Design

4.11 The principles which have shaped the proposed development are described in the Design and Access Statement, which also explains how the scheme has evolved over a period of several years to reflect site-specific issues and extensive consultation with local residents, businesses, other stakeholders and CABE.

4.12 The scheme's design, townscape and public realm principles include:

- a dynamic 'crescent' adjacent to the new bus station, forming a modern and exciting new pedestrian link with Station Road and Regent Street in an arc route, lined by exciting new restaurants/cafés and shops;
- buildings designed using a palette of high-quality materials; and
- new memorable public spaces and pedestrian areas that are safe and well-lit, again using attractive materials complemented by street furniture and landscaping/planting.

4.13 In summary, the proposed development will transform the south western part of the town centre by rejuvenating a poorly maintained area of land with deteriorating public realm and delivering a high-quality, landmark development at a gateway site.

Economic and Physical Regeneration

4.14 The Planning Statement explains how the proposed development will improve the economic performance of a defined Sub-Regional Centre, which is entirely consistent with the objectives of a raft of national, regional and local policy documents.

4.15 The proposed scheme will also deliver significant physical regeneration benefits by reusing underused, previously developed land to provide high quality, modern buildings and open spaces at a prominent town centre site.

Employment

4.16 As the Socio-Economic Impact Assessment shows, the proposed development will provide new employment opportunities within an area of the Borough with the highest concentrations of deprivation. The positive socio economic impacts will contribute to increased economic activity and employment rates whilst reducing unemployment, worklessness and deprivation in the local area.

Summary

4.17 Policy EC10.1 of PPS4 encourages LPAs to give favourable consideration to planning applications that secure sustainable economic growth. As we have explained in this section of our Retail Statement, and in other supporting material, the proposed development will deliver sustainable economic growth within a defined Sub-Regional Centre together with a range of economic benefits for the Borough as a whole.

4.18 The development has been carefully designed to ensure that it will limit carbon dioxide emissions, through measures such as maximising accessibility by non-car modes and by maximising the use of passive energy, sustainably sourced materials and low carbon technologies. The development is located in the town centre and will be served by a new bus station, thereby maximising accessibility for local residents.

4.19 The scheme will transform the south western part of the town centre by rejuvenating a poorly maintained area of land with deteriorating public realm and delivering a high-quality, landmark development at a gateway site. It will also deliver a range of economic and employment benefits.

4.20 For the reasons set out above and in other supporting material, it is clear that the proposed development satisfies the requirements of Policy EC10 of PPS4.

5 SEQUENTIAL APPROACH TO SITE SELECTION

Requirements of PPS4

5.1 Policy EC5 of PPS4 provides advice in relation to site selection and land assembly in the plan-making process, whilst Policy EC15 sets out the requirements of the sequential assessment for development control decision-making.

5.2 Policy EC5 sets the order of preference in applying the sequential approach, as follows:

first, locations within appropriate existing centres, where sites or buildings for conversion are, or are likely to become, available;

second, edge-of-centre locations, with preference given to sites that are or will be well-connected to the centre; and then

out-of-centre sites, with preference given to sites which are, or will be, well served by a choice of means of transport, and which are closest to the centre and have a higher likelihood of forming links with the centre.

5.3 The distance threshold for the purposes of the 'edge-of-centre' definition varies from up to 300 metres from the primary shopping area for retail use, to within 300 metres of a town centre boundary for all other main town centre uses (as set out in Annex B of PPS4). LPAs are required to give weight to those sites that best serve the needs of deprived areas when considering alternative sites at the same level in the sequential ranking (Policy EC5.3 of PPS4).

5.4 When considering potential sequentially preferable opportunities, Policy EC15 instructs that: sites should be assessed in terms of their availability, suitability and viability; all in centre options be thoroughly assessed before less central sites are considered; and where it is demonstrated that there are no town centre sites, preference should be given to edge of centre locations that are well connected to the centre by easy pedestrian access.

5.5 Policy EC15 also requires that - in applying the sequential approach - developers and operators demonstrate flexibility in terms of:

scale: reducing the floorspace of their development;

format: more innovative site layouts and store configurations such as multi-storey developments with smaller footprints;

car parking provision: reduced or reconfigured car parking areas; and

the scope for disaggregating specific parts of a retail or leisure development.

5.6 However, LPAs should not seek the arbitrary sub-division of proposals, and paragraph EC15.2 requires LPAs to 'take into account any genuine difficulties which the applicant can demonstrate are likely to occur in operating the proposed business model from a sequentially preferable site, for example, where a retailer would be limited to selling a significantly reduced range of products'.

Sequential Location of the Application Site

5.7 As we explained in Section 3, we consider that the application site offers clear potential to function as an integral part of Hinckley Town Centre. The site is located wholly within the Town Centre Boundary, as defined on the Local Plan Proposals Map; it is directly adjacent to existing secondary shopping streets; and pedestrian linkages between the site and the rest of the town centre are already well-established. The site contains the bus station - as well as car parks which are regularly used by visitors to the town centre – and both of these facilities will be significantly improved as part of the development. Furthermore, the Bus Station site is identified as part of the Primary Shopping Area in Appendix 4 to the emerging HTCAAP, which has reached an advanced stage of preparation.

5.8 Nevertheless, since the application site is not located within or adjacent to the Primary Shopping Frontage, as currently defined on the Local Plan Proposals Map, it is, at present, technically 'edge-of-centre' for the purposes of PPS4. We have therefore assessed a range of alternative sites, in order to assess their potential for accommodating the type of retail development that is currently proposed.

5.9 We emphasise from the outset, however, that the emerging HTCAAP does identify the application site as an appropriate location to 'provide a mix of retail, leisure and commercial uses', of the scale proposed by the current application. Indeed, it is essential that the Bus Station site is redeveloped comprehensively so that a scheme with sufficient critical mass to achieve the Council's policy objectives for the site, and the town centre, are realised.

5.10 Accordingly, whilst the proposed development includes a wide range of uses, it would not be appropriate to conduct a search for sites that are capable of accommodating the discrete elements of the scheme. For instance, it is possible that other sites could accommodate some of the comparison and/or convenience retail floorspace that is proposed at the application site, and other components of the scheme – such as the food & drink outlets, or the proposed office space – could potentially be accommodated at alternative sites.

5.11 However, to disaggregate the various components of the proposal would mean that many of the significant benefits associated with the comprehensive scheme – for example, the replacement of the existing out-dated bus station, and the public realm enhancements to this key gateway site - would be lost. We believe that the substantial improvement to the town centre's shopping, leisure, public transport and parking facilities that will be delivered by the proposed development are far greater than any benefits associated with locating discrete elements of the scheme at other, smaller town centre sites which are not capable of delivering the same critical mass benefits.

5.12 Accordingly, we consider that it is necessary to undertake a search for sites that are capable of accommodating a comprehensive development of the type proposed, rather than seeking to accommodate the various components of the proposed scheme at a number of separate sites, which would considerably dilute the many benefits associated with the proposed scheme.

Area of Search

5.13 We have used the OCA defined for the RCS as the catchment area for the proposed scheme, because we consider that the proposed development will draw trade from across the majority of the Borough (just as the existing shops and services in the town centre do). A plan showing the extent of the OCA is presented in Appendix 1.

5.14 Hinckley is, by some considerable margin, the dominant centre within the OCA, achieving a comparison market share of 28 per cent, whereas no other centre in the OCA achieves a comparison market share above 2 per cent. As such, the Core Strategy is clear that Hinckley, as the principal centre within the Borough, should be the focus for housing, jobs and services. Hinckley Town Centre is thus identified as a sub-regional centre, where the vast majority of development should be focused. Conversely, the Core Strategy is clear that the centres in the second tier of the settlement hierarchy – Burbage, Barwell and Earl Shilton – should 'provide more local services to their population and support Hinckley's town centre'.

5.15 Against this policy background, we consider that it is appropriate to focus on potential alternative sites within and around Hinckley Town Centre itself. None of the other centres within the OCA are appropriate locations for the type and scale of retail development that is proposed, given the relatively localised catchments that they serve and their different roles in the retail hierarchy.

5.16 We have conducted our assessment of alternative sites in accordance with the sequential approach to site selection as set out in Policy EC15 of PPS4, and we have considered sites located both within and on the edge of Hinckley Town Centre. We do not consider it necessary to consider any out-of-centre sites, because such sites are not sequentially preferable to the application site, and offer no advantages in terms of the potential to form linkages with existing town centre facilities.

5.17 We are aware that the Council has already undertaken a significant amount of work to identify potential development opportunities within and around Hinckley Town Centre, as part of its preparation of the HTCAAP, which is currently at Proposed Submission stage. As such, the HTCAAP identifies nine 'Strategic Development Areas' (SDAs), which offer some potential for redevelopment. The Bus Station site, and four other SDAs, are located wholly within the Town Centre Boundary as defined in Appendix 3 of the emerging HTCAAP, and a further SDA straddles the Town Centre Boundary. For the purposes of our sequential assessment, we have considered these five alternative sites. We emphasise at the outset, however, that we do not consider any of the assessment sites to be superior to the Bus Station site in location terms. The remaining three SDAs[5] are all in out-of-centre locations and so they are not covered by our sequential assessment. The

[5] Land at Rugby Road/Hawley Road; Land at the Railway Station, Southfield Road; and Land at North Warwickshire and Hinckley College. The Jarvis Porter Site at Coventry Road was identified as a SDA in the October 2008 version of the HTCAAP, but the Proposed Submission version of June 2010 does not treat the site as an SDA. In any case the site is out-of-centre and so it is not sequentially preferable to the application site.

boundaries of the five opportunity sites that we have identified and assessed are shown in our Appendix 3.

5.18 Finally, we note that Policy EC14 of PPS4 requires a sequential assessment for all planning applications for 'main town centre uses'. Paragraph 7, in the Introduction to PPS4, explains that town centre uses include: retail development; leisure and entertainment facilities (including cinemas, restaurants, bars and pubs, and indoor bowling centres); offices; and arts, culture and tourism development. Our sequential assessment below thus considers the potential offered by each of the alternative sites for all of the uses proposed in the current application, and not just the potential offered for the retail component.

Sequential Site Assessment

5.19 As explained above, we have considered five alternative sites located within and on the edge of Hinckley Town Centre. A number of these sites were considered in the Borough-wide RCS of 2007 but were found to have only limited potential for retail redevelopment. Nevertheless, we have reassessed these sites, in addition to any new potential alternatives. Site visits were conducted during February 2010.

5.20 Full details of our sequential analysis are provided in Appendix 3, which contains a completed pro-forma for each potential alternative site specifying (inter alia): location; size (in hectares); allocation in the Local Plan; proposed allocation in the HTCAAP; sequential status; current uses; physical characteristics; accessibility; and our summary of the site's suitability, availability and viability for comprehensive, retail-led, mixed-use development.

5.21 Below, we summarise our assessment of each site. A plan is provided in Appendix 3 which depicts the location of the various sites that we have considered.

Site 1: Atkins Factory

5.22 This 1.2 ha site is located towards the north of the existing town centre, and is primarily situated outside of the Town Centre Boundary, as defined on the saved Local Plan Proposals Map, and it is also mostly outside of the Town Centre Boundary as defined on the plan in Appendix 3 to the emerging HTCAAP. The site comprises two parcels of land, located on either side of Lower Bond Street. The parcel on the east side of the road previously contained a factory, which has now been cleared, although a Grade II listed building remains on site. The parcel on the west side of the road consists of a small plot of vacant land, and the Hinckley and District Museum, which is a Grade II listed building, dating from the 17th Century.

5.23 The majority of the site is not available for development. Indeed, the eastern part of the site has planning permission for a college building and a creative industries centre, which are now under-construction on site. The western part of the site is primarily occupied by the museum, which is still in active use. Only one small (0.2 ha) vacant plot of land is available for development. However, this site is not suitable for intensive commercial development, as it is too small in size, situated in a peripheral location, and constrained by its setting adjacent to a Grade II listed building.

Site 2: Stockwell Head / Concordia Theatre

5.24 This 3.1 ha site is also located towards the north of the town centre, to the rear of the Primary Shopping Frontage along Castle Street. The area is characterised by a mix of uses, a poor public realm and a low-grade appearance. The existing uses on site include the Concordia Theatre, a Working Men's Club, a Baptist Chapel, a residential terrace, offices, industrial premises, a car park and several secondary retail outlets.

5.25 The site is currently in complex, multiple land-ownership, with many tenants, which is likely to severely restrict comprehensive redevelopment of the site. There are also no access roads within the site, and there are various topographical issues which would need to be overcome to support development. Moreover, we note that the backland location of the site - which offers limited main road frontage, and currently provides poor pedestrian linkages with the Primary Shopping Frontage - is unlikely to be attractive to mainstream retail, service and commercial leisure operators.

5.26 We do not consider, therefore, that the site is available, suitable or viable for a major retail-led mixed-use scheme and, in our assessment, it is more suitable for small-scale infill development and public realm improvements. Certainly, we do not consider that this backland site has the potential to form a natural extension to the town centre, and we suggest that the application site already benefits from stronger pedestrian linkages with the Primary Shopping Frontage.

Site 3: Britannia Centre / Castle Street

5.27 This 1.9 ha site comprises the existing Britannia Shopping Centre, in addition to several retail units along Castle Street. The site's location within the Primary Shopping Frontage, and its existing use as a shopping centre, make it highly suitable for further retail use. Indeed, the emerging HTCAAP identifies the site as suitable for the provision of around 7,000 sq.m of comparison retail floorspace. We consider that the site is particularly suitable for accommodating 'high street' comparison retailers, and potentially a department store (which is absent from the existing retail offer in Hinckley).

5.28 However, despite the suitability of the site for retail development, we are not aware that the owner of the Britannia Shopping Centre has any intentions to extend or enhance the centre in the short-term. The emerging HTCAAP (page 52) estimates a target timescale of 2013-16 for the initial phase of the Centre's redevelopment, but acknowledges that this is dependent on tenant and market demand. Lambert Smith Hampton also reaches a similar conclusion on page 43 of its 'Hinckley Town Centre Area Action Plan Viability and Deliverability Assessment' report (April 2010). In the absence of any certainty on the timing of any redevelopment of the Britannia Centre the site cannot, therefore, be said to be currently available for retail redevelopment.

5.29 Furthermore, we note that whilst the site is suitable for additional comparison floorspace, there appears to be insufficient physical capacity to provide a food superstore at the site, which is relatively constrained by the surrounding built form. Although there is a car park to the rear of the Britannia Centre, this provides an important facility for visitors and is adjacent to the Centre's service access. There appears, therefore, to be limited scope to materially expand the Britannia Centre, beyond the current building footprint. We also consider that there is insufficient car parking provision, and vehicular and service access, to support the development of a superstore at the site.

5.30 Given its size, and the constraints of surrounding uses, the Britannia Centre site simply does not have the critical mass to accommodate the established quantitative and qualitative need for additional retail and leisure facilities in the town centre, nor deliver the policy outputs desired of the substantial Bus Station site. Nevertheless, as we demonstrate in Section 6, our updated capacity assessment has shown that there will still be sufficient expenditure capacity to support a redevelopment scheme at the Britannia Centre/Castle Street to provide additional 'high street' shops within the Primary Shopping Frontage, which would complement the larger scheme at the Bus Station site.

Site 4: The Leisure Centre

5.31 This site comprises the existing Borough Leisure Centre and its car park. The leisure centre has a limited life of approximately 15 years, and there is a need to update and improve existing facilities. In order to determine future options, the Council commissioned MACE to undertake a feasibility study for the provision of a leisure centre in Hinckley. The study, which was completed in May 2007, found that in order to provide a significantly improved centre, the leisure centre would need to be relocated, and an alternative site has been identified.

5.32 The current leisure centre site will therefore become available for redevelopment in the foreseeable future. However, the site is relatively small in size, and of poor configuration to support major retail or mixed-use development. The site is also located towards the fringe of the town centre and is not likely to be attractive to mainstream retail, service and commercial leisure operators.

5.33 Thus, although the site is likely to become available for redevelopment, it is not suitable or viable for a scheme of the scale proposed at the Bus Station site. In any case, we consider that this site is not sequentially preferable to the application site, as it offers poor pedestrian linkages with the Primary Shopping Area, and is divorced from the existing secondary shopping frontages by Trinity Lane. The site is more appropriate for residential development, as recommended in the emerging HTCAAP.

Site 5: Land North of Mount Road

5.34 This relatively large site (4.5 ha) currently comprises the existing Borough Council offices; the Castle Mound; Memorial Gardens; Florence House; the Vicarage; a health centre; and the Hinckley and District Hospital. A large proportion of the site also currently provides local amenity and recreational space, and is protected for this purpose by saved Policy REC1 of the Local Plan.

5.35 There are thus a number of active uses on the site, which are likely to remain for the foreseeable future, such as the District Hospital. The only part of the site which may become available for redevelopment or reoccupation is the Council offices. However, the office block is located in the centre of the site, with no main road frontage, and is unlikely to be attractive to mainstream retail and commercial leisure operators. Moreover, the office site is very close to a scheduled ancient monument (Hinckley Castle) and a listed building (the War Memorial), and is not appropriate for a major mixed-use scheme of the type proposed at the Bus Station site.

5.36 In sum, we consider that the site may offer some small-scale development opportunities, particularly around its boundary, but any development should be for uses that are sympathetic to the historic and open setting of the park (such as residential development, as suggested in the HTCAAP).

Summary of Our Sequential Site Assessment

5.37 We have assessed the potential offered by five of the SDAs identified in the emerging HTCAAP. As described above, and also in the pro-formas in Appendix 3, we have found that none of these opportunity sites are available <u>and</u> suitable <u>and</u> viable for the scale and type of mixed-use development which is currently proposed. Furthermore, we are not aware of any other sites, either within or adjoining the town centre, which could accommodate the application scheme.

5.38 We therefore consider that the application site itself is the most appropriate location for accommodating the proposed development, which is necessary to address the current deficiencies in the retail and commercial leisure offer in Hinckley, strengthen the role and function of the town centre, and claw-back expenditure that currently leaks to destinations beyond the Borough.

5.39 The application site is located within a short walk of the Primary Shopping Frontage, and also contains the town centre bus station. Furthermore, linkage improvements are included within the proposals. Development of this site will create a new commercial anchor, which will strengthen the retail circuit within the town centre, as pedestrians travel between the application site and Castle Street, thereby increasing footfall in currently secondary areas such as Regent Street and Station Road. We thus consider that the application site will function as an integral part of the town centre, complementing the existing offer and creating 'spin off' benefits for existing traders.

5.40 Moreover, we note that the Council has identified the application site as the most appropriate location within the town centre to accommodate a scheme of this nature. The emerging HTCAAP identifies the Bus Station site as a SDA, and Policy 9 identifies the Council's key aspirations for the site's redevelopment, which are to:

- provide an enhanced bus station and associated passenger facilities;
- create an exciting landmark development at this key gateway site;
- provide a mixed-use scheme anchored by a food superstore, with other potential uses including office/commercial floorspace, cafés, restaurants, comparison retail units, a cinema and other leisure uses;
- achieve high quality public realm improvements including improved pedestrian connectivity within the site and to other parts of the town centre;
- improve links to Hinckley railway station; and
- provide a consolidated car park of approximately 560 spaces.

Scope for Disaggregation

5.41 When considering sequentially preferable opportunities that are within or on the edge of existing centres, PPS4 advises that developers and operators should demonstrate flexibility in terms of: scale, format, car parking provision, and the scope for disaggregating specific parts of a retail or leisure development.

5.42 Firstly, in terms of the quantum of floorspace proposed, we note that the application scheme has been specifically designed to address the quantitative and qualitative need that exists for additional retail floorspace in Hinckley, as identified in the RCS, and stated in the Core Strategy and the emerging HTCAAP. The scale of floorspace proposed is necessary to address the current deficiencies in the town centre's retail and commercial leisure offer, attract modern and higher quality operators to Hinckley, and claw-back some of the substantial expenditure that currently leaks to destinations outside the Borough, such as Leicester, Fosse Shopping Park, and Nuneaton. We consider, therefore, that the quantum of floorspace proposed is appropriate for Hinckley Town Centre, and that it is fully in accordance with local planning policy. The level of car parking proposed is necessary to service this scale of development, and is also consistent with the Council's aspirations, as specified in Policy 9 of the emerging HTCAAP.

5.43 The applicant has demonstrated flexibility with regard to the format of the proposed development. Indeed, the scheme has been specifically designed so that the car park will be located beneath the proposed foodstore. From a commercial perspective, this is not the most desirable layout for the foodstore (which would prefer surface-level car parking), but the scheme has been designed in this way to ensure that the development will fit onto the Bus Station site, where the scheme will be well-connected to existing shops and services, and be able to deliver 'spin off' benefits for the town centre as a whole.

5.44 It is also necessary to consider whether there is scope to disaggregate specific parts of the scheme, so that the different parts might be located on separate sequentially preferable sites. The scheme does comprise several different elements, including: a food superstore; 18 comparison retail units; offices; a cinema; bowling alley; and several restaurants and cafés.

5.45 In this regard, we note that the proposed superstore, which anchors the scheme, comprises around 9,700 sq.m of gross floorspace. However, for the reasons already provided in our sequential assessment above, we do not consider that this element of the scheme can be accommodated at any of the alternative sites that we have assessed, as none of the sites are suitable for this type of retail use.

5.46 We do not consider that it would be appropriate or viable to separate other elements of the scheme and distribute the uses throughout the town centre. Although there are some vacant units in the town centre, these are generally small and poorly configured and not ideally suited to meeting the requirements of modern retail and commercial leisure operators, as demonstrated by the fact that several of the units have been vacant for some time. Distributing the uses throughout the town centre is also likely to diffuse operator demand for the proposed scheme, because operators are often attracted to the 'critical mass' created by larger schemes. One attractive, large scheme, which provides a cluster of new shops and leisure facilities in one location, is also more likely to have a meaningful effect on local shopping patterns, and tempt residents who currently shop or visit leisure services outside of the Borough, to return to Hinckley. The proposed scheme will thus create a distinctive new leisure quarter within Hinckley Town Centre and will provide a new retail anchor, which will complement the existing offer on Castle Street.

5.47 Moreover, we also note that developing the application site (to accommodate the superstore), in addition to developing alternative sites in the town centre to accommodate other elements of the scheme, would be an unviable option for the applicant. For this and all of the reasons outlined above, we consider that it is not appropriate to disaggregate the application proposal, and we conclude that the application site is the most sequentially preferable to accommodate the exciting new mixed-use scheme that is proposed.

Summary

5.48 The application site is located wholly within the defined Town Centre Boundary and is identified as part of the Primary Shopping Area in Appendix 4 to the emerging HTCAAP, which has reached an advanced stage of preparation. Nevertheless, the application site is presently 'edge-of-centre' for the purposes of PPS4 and so we have carefully considered the potential offered by five alternative sites, located both within and on the edge of Hinckley Town Centre. However, we have demonstrated that none of these alternative sites are available and suitable and viable for a major, retail-led mixed-use development of the type currently proposed.

5.49 We have also shown that it would be inappropriate to disaggregate the mixed-use scheme, and accommodate the separate elements on several smaller sites. Not only would such an option be unviable for the developer, but it would diffuse the critical mass of the scheme, which is important to achieve if the scheme is to successfully change local shopping patterns and claw-back expenditure that currently leaks to destinations beyond the Borough.

5.50 The application site is thus the most sequentially preferable opportunity to accommodate the proposed scheme. Development of a new commercial anchor on this site will strengthen the retail circuit within the town centre, and encourage pedestrians to travel between the application site and Castle Street, increasing footfall in currently secondary areas such as Regent Street and Station Road. We consider, therefore, that the application site will function well as an integral part of the town centre, complementing the existing offer and creating 'spin off' benefits for existing traders.

5.51 The proposed redevelopment of the application site accords with the provisions of the adopted Core Strategy and Policy 9 of the emerging HTCAAP.

5.52 In summary, we consider that the application proposal meets the requirements of Policy EC15 of PPS4 ('sequential assessment').

6 IMPACT ASSESSMENT

Requirements of PPS4

6.1 Policy EC14.4 explains that impact assessments are required for planning applications for retail and leisure developments which will provide over 2,500 sq.m of gross floorspace (or any local floorspace threshold) which are not in an existing centre. Policy EC14.6 stipulates that an impact assessment is also required for planning applications in an existing centre, which are not in accordance with the development plan and which would substantially increase the attraction of the centre to an extent that the development could have an impact on other centres. Although the application scheme is fully in accordance with the recently adopted Core Strategy, and will function as an integral part of the town centre, for completeness we have nevertheless undertaken an impact assessment given the scale of the scheme and its technically edge-of-centre location.

6.2 Policy EC14.7 explains that the assessment of impact should focus, in particular, on the first five year period after the implementation of a proposal (our emphasis). The application scheme is a major development, and further site acquisition - potentially through the use of compulsory purchase orders - will be required before construction can commence. We consider that the scheme will not be complete, fully open and trading until around 2016, and so consequently we consider the impacts at 2021, which is five years after the likely implementation date of the scheme. For completeness, however, we also consider impacts at 2015 (that is, five years from now), although we do not consider that, in practice, the scheme will be trading at this point in time.

6.3 Policy EC16.1 goes on to specify six impacts which should be appraised in an impact assessment, as follows:

a) the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal;

b) the impact of the proposal on town centre vitality and viability, including local consumer choice and the range and quality of the comparison and convenience retail offer;

c) the impact of the proposal on allocated sites outside town centres being developed in accordance with the development plan;

d) the impact of the proposal on in-centre trade/turnover and on trade in the wider area, taking account of current and future consumer expenditure capacity in the catchment area up to five years from the time the application is made, and, where applicable, on the rural economy;

e) if located in or on the edge of a town centre, whether the proposal is of an appropriate scale (in terms of gross floorspace) in relation to the size of the centre and its role in the hierarchy of centres; and

f) any locally important impacts on centres.

6.4 It is notable that the last impact - point (f) – is highly subjective, and PPS4 explains that as part of the Local Development Framework, LPAs can define any bespoke locally important impacts on centres which should be tested.

6.5 In making a planning decision based upon an impact assessment, Policy EC17 advises that planning applications should be refused where there is clear evidence that the proposal is likely to lead to significant adverse impacts in terms of any one of the impacts listed under paragraph 6.4 above, or under Policy EC10.2 of PPS4. Where no significant adverse impacts have been identified - and where the application also satisfies the requirements of the sequential test (which we have demonstrated in Section 5 above) - planning applications should be determined by taking account of the positive and negative impacts of the proposal and other material considerations, and also the likely cumulative effect of recent permissions, developments under construction and completed developments.

6.6 Finally, we note that our impact assessment considers not only the impact of the proposed retail floorspace, but, in line with PPS4, it also assesses the impact of all the 'town centre uses' that are proposed as part of the current application scheme.

Turnover of the Application Scheme

6.7 Before we assess the impact of the application scheme, it is necessary to consider in more detail the quantum of floorspace proposed, and the likely turnover requirements of the various units.

6.8 As we explained in Section 3, the proposed development will comprise a vibrant mixture of retail, leisure and office uses together with a new bus station and a new, undercroft car park. The scheme will be anchored by a new food superstore together with 18 comparison retail units, complemented by a range of restaurants, cafés, offices, a multi-screen cinema and a bowling alley/family entertainment centre.

6.9 The summary in Table 6.1, below, provides an indication of the likely gross floorspace of each of the types of use proposed, and also the likely sales floorspace of the retail units. As we explained in Section 3, for the purposes of this outline planning application, we have assumed that the food superstore will have a net to gross ratio of 65 per cent, and that 67 per cent of the floorspace will be used for the sale of convenience items, with the remaining 33 per cent of the floorspace used for the sale of non-food items (which is typical for superstores of the type proposed). We have also assumed that the 18 additional retail units will be occupied by non-food retailers and will have a net to gross ratio of 70 per cent.

6.10 In total, therefore, the proposed scheme will provide 4,213 sq.m of convenience sales floorspace, and 8,910 sq.m of comparison sales floorspace. In addition, the application scheme proposes the provision of: 706 sq.m of commercial office floorspace; 3,619 sq.m of commercial leisure floorspace (a bowling alley and a cinema); and five units that will be occupied by restaurant and café outlets, with a combined floorspace of 1,454 sq.m.

Table 6.1 Summary of Proposed Floorspace

Use Class	Use	GIA Floorspace (sq.m)	Indicative Sales Floorspace (sq.m)
A1	Convenience Retail	6,482	4,213
A1	Comparison Retail	12,956	8,910
	Total Retail	19,438	13,123
A3	Total Restaurants & Cafés	1,454	
	Total Restaurants & Cafés	1,454	
B1/A2	Financial & Professional Services	706	
	Total Offices	706	
D2	Bowling Alley	1,526	
D2	Cinema	2,093	
	Total Leisure	3,619	
	Total All Uses	25,218	

6.11 Based on the floorspace figures in Table 6.1, we have estimated the likely turnover of the retail element of the proposed scheme, and our calculations are presented in full in Schedule 4 in Appendix 2. In summary, we have assumed that the proposed food superstore will trade in line with the average for the 'big four' supermarket operators, which equates to a convenience sales density of £12,426 per sq.m, and a comparison sales density of £8,258 per sq.m, at 2010[6]. We have assumed that the 18 non-food retail units will be occupied by a variety of operators, covering the clothes and shoes, health and beauty, and household goods sectors, and we have estimated the likely sales density of each unit, based on the expected operator[7], or – where the operator is unknown - the size and configuration of the unit. Units A2 to A7 and A9 to A11 all have mezzanine floors, and we have assumed – in line with standard retail practice - that the mezzanine levels will only achieve half the sales density of the ground floor.

6.12 Based on the above assumptions, we estimate that at 2010 the proposed scheme would generate an annual convenience turnover of £52.4m, and an annual comparison turnover of £40.5m, equating to an overall retail turnover of £92.9m.

6.13 It is important to note, however, that not all of the £92.9m represents 'new' turnover generated at the application site. Indeed, there are already several active retail uses at the site, which will be redeveloped as part of the application scheme. For the purposes of this assessment, it is appropriate therefore to consider the impact of the 'uplift' in turnover at the site - above and beyond what is already generated at the site – so as to assess the net additional impact of the application scheme.

[6] Source: based on data in 'UK Grocery Retailers 2009' (Verdict Research).

[7] Our client has provided us with an indication of the likely tenant mix, which we have used to estimate the likely turnover of the 18 non-food retail units (using sales densities figures published in Mintel's Retail Rankings, 2009 Edition). For reasons of commercial confidentiality we cannot specify individual retailers at this stage.

6.14 As we explained in Section 3, the application site already accommodates several A1 retail uses, namely Sainsbury's and Iceland supermarkets, a furniture store, a model shop, and a party shop[8]. We have measured the gross floorspace of each of these units, using Promap, and have also estimated their respective sales floorspace and likely turnovers, as detailed in Schedule 2 of Appendix 2[9]. In sum, we find that the site currently contains 4,246 sq.m of gross retail floorspace, which provides 1,137 sq.m of convenience sales floorspace, and 1,229 sq.m of comparison sales floorspace. We estimate that the existing comparison retail floorspace at the site has a combined annual turnover of £2.3m, and that the existing convenience retail floorspace achieves an annual turnover of £9.7m.

6.15 As such, the application scheme will result in a net uplift in comparison turnover of £38.2m (£40.5m minus £2.3m), and a net uplift in convenience turnover of £42.7m (£52.4m minus £9.7m) at 2010. By 2015, if we factor in growth in floorspace efficiency[10], we expect that the scheme will generate a net uplift in comparison turnover of <u>£40.6m</u>, and a net uplift in convenience turnover of <u>£43.7m</u>. We use the 2015 net additional turnover figures as the basis for our impact assessment, as set out below.

6.16 Finally, we note that we do not consider it necessary to calculate the likely turnover of the other town centre uses which are also proposed at the site. The impact deriving from these types of uses is not usually measured by modelling trade draw and diversion, but by considering wider issues connected to operator demand and the diversity of uses, and we address these points below.

Impact Assessment

6.17 We now assess the application scheme against each of the six 'impacts' specified in Policy EC16.1 of PPS4, which are also listed in paragraph 6.3 above.

Impact of the Proposal on Existing, Committed and Planned Public and Private Investment

6.18 We have used the OCA defined for the RCS as the catchment area for the proposed scheme, because we consider that the proposed development will draw trade from across the majority of the Borough (just as the existing shops and services in Hinckley Town Centre do). The main centre within the catchment area is Hinckley Town Centre itself. There are no other town or district centres within the catchment area, and only eight local

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[8] The site contains one other A1 use; a dry cleaners. However, since this does not represent 'retail' floorspace, we have not taken account of this unit's turnover in our impact assessment.

[9] We have used a standard net to gross ratio of 70% for the comparison retail stores, and we have derived sales floorspace data for the two supermarkets from IGD (2009). Based on our observations on site, we estimate that 85% of the sales floorspace in the Sainsbury's store is used for the sale of convenience goods (and 15% comparison goods), whilst 100% of the floorspace in the Iceland supermarket is used for the sale of convenience items. We have applied company average sales densities to derive the turnovers of the two supermarkets, and we have estimated appropriate sales densities for the comparison units, based on our observations on site.

[10] We have factored in a convenience sales density growth of 2.3% between 2010 and 2015, and a comparison sales density growth of 6.0%. The sales density growth estimates are linked to the rate of expenditure growth in these years, and are derived from analysis of the historic relationship between expenditure growth and growth in floorspace efficiency.

shopping centres (within Hinckley and Bosworth Borough), four village centres (within Blaby District), and one further village centre (within Harborough District)[11]. As far as we are aware, there are no committed proposals or plans in the pipeline for any of the local and village centres, which the application scheme could have an impact upon. Indeed, these small-scale centres generally provide a 'top-up' food and grocery function and meet the day-to-day service needs of their local residents, and we do not consider that these roles will be affected by the application scheme. We focus, therefore, on the potential impact on Hinckley Town Centre itself.

6.19 There has been no major investment or new development within Hinckley Town Centre for many years, and we are not aware of any firm proposals in the pipeline apart from the application scheme, which represents a key opportunity to secure major investment, and will deliver a landmark mixed-use scheme that will function as an integral part of the town centre. The scheme will, therefore, represent significant investment in Hinckley.

6.20 In addition to the direct investment benefits that the scheme will bring, the development may also have an indirect positive impact on investment in the town centre. Indeed, the delivery of a high quality mixed-used scheme, which will increase footfall within the town centre, is likely to bolster investor confidence and may encourage further public and private sector investment in other parts of Hinckley Town Centre. We consider, therefore, that the proposed development will have 'spin off' benefits in terms of future investment prospects for Hinckley.

6.21 Although there are currently no other firm proposals or plans in the pipeline for Hinckley, we are aware that the Council has aspirations for further investment within the town centre. Indeed, the emerging HTCAAP identifies a series of Strategic Development Areas, which the Council considers would benefit from redevelopment. The application scheme will certainly deliver the investment planned for the Bus Station site and, crucially, we do not consider that it will threaten any potential future plans for other identified sites.

6.22 Within the other sites referred to above, one is identified for further retail development (the Britannia Centre site). A redeveloped Britannia Centre could provide additional 'high street' shops within the Primary Shopping Frontage, whilst the application scheme will deliver the critical mass required to meet policy objectives and the retail and leisure needs that have been identified by incorporating a new foodstore and a range of much-needed new homewares and other comparison retailers. The two schemes would therefore complement each other, and would provide appropriate anchor schemes on either side of Hinckley Town Centre, thereby bolstering the retail circuit and generating increased flows of footfall along currently secondary areas of the town centre (such as Station Road and Regent Street), as pedestrians move between the two sites.

6.23 We also do not envisage that the application scheme will dissipate operator demand for representation in a redeveloped Britannia Centre, because there will always be demand from 'high street' retailers for units within the Primary Shopping Frontage. Furthermore,

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[11] Barlestone, Barwell, Broughton Astley, Burbage, Desford, Earl Shilton, Huncote, Hinckley, Market Bosworth, Narborough, Newbold Verdon, Sapcote, and Stoney Stanton.

developers and operators are likely to be attracted by the overall scale of investment taking place in Hinckley Town Centre, which is likely to claw-back expenditure that currently leaks from the town, and improve the trading environment for businesses located throughout the town centre.

6.24 Furthermore, we have updated the retail capacity assessment that we undertook for the Council in our 2007 RCS. Our updated capacity assessment is presented in Appendix 4, and is based on the latest available data inputs and assumptions with regard to expenditure growth, population growth, per capita expenditure, spending on special forms of trading, retail commitments, and so on[12]. The emerging HTCAAP identifies the Britannia Centre site for the provision of additional comparison floorspace, and so it is this retail sector that we focus on in our update of the RCS.

6.25 Our 2007 household survey found that the centres and stores within the OCA only retain 32 per cent of the comparison expenditure available to residents of the OCA, which we consider to be a relatively low level of retention. Hinckley Town Centre itself accounts for the majority of expenditure retained within the Borough, and has a market share of 28 per cent. Meanwhile, the main outflows (or leakage) of comparison expenditure are to: Fosse Park, Leicester; Leicester City Centre; and Nuneaton Town Centre.

6.26 For the 2007 RCS, we produced three sets of forecasts for comparison expenditure capacity. The first forecast was based on the maintenance of the existing low retention rate of 32 per cent (Scenario A). The second scenario was based on an assumed increase in the overall study area retention rate of four percentage points, to a new level of 36 per cent (Scenario B). The third forecast was 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). In the RCS, we concluded that there is scope to moderately increase the retention rate to 36 per cent, and we therefore recommended that the Council should plan on the basis of the capacity figures identified under Scenario B.

6.27 In our updated capacity assessment, we have similarly prepared three sets of forecasts, based on the same scenarios (A, B and C) outlined above. We do not consider it necessary to discuss the Scenario A results, because it is not the Council's aspiration to maintain Hinckley's current low level of retention (at 32 per cent).

6.28 The Scenario B forecasts are presented in Spreadsheet 7b in Appendix 4, which shows that over the period of the Core Strategy and the emerging HTCAAP, which both run up to 2026, there will be £52.3m of surplus comparison expenditure capacity, after allowance for commitments, which can be used to support additional non-food floorspace in Hinckley. As we explain above, the application scheme is likely to generate an uplift in comparison turnover of around £38.2m, which still leaves a surplus of £14.1m that can be used to support additional comparison retail floorspace at the Britannia Centre.

6.29 Indeed, if two major retail development schemes are to come forward in Hinckley, it may even be appropriate to consider the Scenario C forecasts, which are based on the

[12] All of the assumptions are described in full in the footnotes to the spreadsheets in Appendix 4.

assumption that the OCA achieves a more considerable increase in its retention rate, from 32 per cent to 40 per cent. Under Scenario C, there will be £81.5m of residual comparison goods expenditure at 2026, which would be more than sufficient to support both the application scheme and a significant expansion/redevelopment of the Britannia Centre.

6.30 In summary, it is the Council's aspiration to secure redevelopment of the Bus Station site and the Britannia Centre/Castle Street site. The application scheme will ensure delivery of the redeveloped Bus Station site and will secure substantial investment in the town centre, and our updated capacity assessment has shown that there will still be sufficient expenditure capacity to support a redevelopment scheme at the Britannia Centre/Castle Street.

6.31 Finally, we also do not consider that the application scheme will undermine further public or private sector investment in the office or commercial leisure sectors in Hinckley Town Centre. The new office block at the application site will not provide a relatively modest amount of office space, and this development will not threaten future office investment in other parts of the town centre or prevent the take-up of existing office space. Similarly, units within the Primary Shopping Frontage, which benefit from high levels of passing footfall, will still be attractive to restaurant and café operators, despite the proposed concentration of A3 uses in the application scheme. We do not consider, therefore, that any aspect of the application scheme will adversely affect committed or proposed investment in Hinckley Town Centre. Instead, we firmly believe that the application scheme will have both direct and indirect positive impacts on the town centre's investment prospects.

Impact of the Proposal on Town Centre Vitality and Viability, Including Local Consumer Choice and the Range and Quality of the Comparison and Convenience Offer

6.32 As we explain above, Hinckley Town Centre is the main centre within the OCA. We do not consider that the application scheme will have any adverse impact on the vitality and viability of the local and village centres within the OCA. These centres are very small in scale, and do not contain national comparison retail outlets, commercial leisure uses, or a significant amount of office space, and so there is little scope for the scheme to compete with and threaten these centres. In general, the local and village centres provide their residents with 'top-up' food and grocery shopping facilities and day-to-day services, and these functions will not be undermined by the development proposed at the Bus Station site.

6.33 We focus instead on the likely impacts on Hinckley Town Centre, and our analysis is informed by a detailed 'health check' of the centre, which is presented in full in Appendix 5. Our assessment of the 'health', or the vitality and viability, of Hinckley Town Centre, is based upon examination of the 13 indicators specified in Annex D of PPS4 (Indicators A1 to A13). We have also considered one additional indicator, which is not listed in PPS4, namely movement in the national retail rankings.

6.34 On the whole, we consider that Hinckley is a reasonably healthy, but relatively static town centre. Although the town centre achieves a moderate level of vitality and viability (as evidenced by generally busy prime shopping streets, improving retail yields, low levels of crime, and a generally clean and pleasant shopping environment), we note that the performance of the centre has not improved since we undertook our last health check of Hinckley, in 2007. Since 2007, the centre has slipped in the national retail rankings, there has been no significant investment in the town centre, retail rents have remained static, and there has been a rise in the number of vacant properties in secondary locations. At the same time, however, neighbouring competitor centres are improving their offer, and Hinckley faces increasing competition from Leicester, Nuneaton and out-of-centre shopping centres such as Fosse Park.

6.35 We consider, therefore, that Hinckley Town Centre is not realising its full potential, because a significant amount of expenditure available to local residents continues to leak to destinations beyond the Borough. Moreover, we consider that there are a number of key deficiencies in Hinckley's retail and leisure offer, which should be addressed in order to positively improve the vitality and viability of the town centre, and enable it to better serve the needs of local residents.

6.36 The town centre has a limited convenience goods offer, with no food superstore to compete with the out-of-centre offer towards the north of the town, and we consider that the comparison retail offer in the centre is also in need of enhancement. Although Hinckley currently provides a reasonable number of non-food outlets, the existing shop units are typically small and out-dated, and are generally occupied by retailers that focus on the value and lower end of the market. There is thus a need for some modern retail units, to accommodate higher quality comparison retail outlets. Indeed, this is an improvement which was specifically identified by respondents to our 2007 street-side survey, who expressed dissatisfaction with the current range and quality of comparison outlets in Hinckley. The town centre also lacks an active evening economy, with an under-provision of restaurants and cafés, and an absence of family entertainment venues. As a result, footfall in the town centre currently drops off significantly outside normal shop opening hours.

6.37 The proposed scheme has been specifically designed to address these deficiencies in Hinckley's retail and leisure offer. The scheme will provide a food superstore, 18 additional retail outlets, a cinema, a bowling alley/family entertainment centre, and several restaurants and cafés. Furthermore, the application site has been identified by the Council in its emerging HTCAAP as the most appropriate location in the town centre to meet a significant proportion of the quantitative need for additional comparison and convenience floorspace in the Borough in the period up to 2026. The successful delivery of the application scheme is therefore critical, because it represents the main opportunity to substantially expand and improve the retail and commercial leisure offer in Hinckley Town Centre, which will help to enhance its vitality and viability and improve local consumer choice.

6.38 In summary, we consider that the application scheme will have a positive impact on the vitality and viability of Hinckley Town Centre, as it will improve consumer choice, address specific deficiencies in the existing offer, and improve the range and quality of the food, non-food and commercial leisure sectors. However, we note that in order to consider the full consequences of the proposed scheme on Hinckley's vitality and viability, it is also necessary to consider issues of trade draw and diversion, and so we examine these issues in more detail below.

Impact of the Proposal on Allocated Sites Outside Town Centres

6.39 There are no out-of-centre sites allocated for retail, office or commercial leisure development by the 'saved' policies of the Local Plan, or by the adopted Core Strategy. Therefore, the application scheme will not have an adverse impact on the delivery of any allocated sites.

6.40 There are several sites proposed for allocation as 'Strategic Development Areas' (SDAs) in the emerging HTCAAP which are located outside of the Town Centre Boundary as defined on the plan in Appendix 3 to the emerging HTCAAP[13]. These sites are:

- land at Rugby Road/Hawley Road, which is proposed for mixed-use development incorporating residential, commercial and other employment uses (Policy 7);
- Railway Station, Southfield Road, which is proposed for office-led development and the creation of a transport interchange (Policy 8); and
- the North Warwickshire and Hinckley College sites, which are proposed for residential and office uses, along with landscaped open space (Policy 10).

6.41 The site of the former Jarvis Porter building, which is also in an out-of-centre location, was identified as a SDA in the October 2008 version of the emerging HTCAAP. However, this has not been carried forward into the June 2010 version.

6.42 We do not consider that the application scheme will threaten the delivery of any of these out-of-centre sites, none of which are intended for significant retail development. Some small-scale retail units are suggested for the Railway Station/Southfield Road site, but these are intended to be ancillary and complementary to the main office development and transport interchange that are envisaged at the site. In any case, the application site itself is also identified as a SDA in the emerging HTCAAP, and it is the Council's intention that each of the SDAs will complement each other, to deliver wide-ranging regeneration benefits to Hinckley Town Centre and to the Borough as a whole.

6.43 In summary, the application proposal will not adversely affect the development prospects of any out-of-centre site that is either allocated for redevelopment or proposed for allocation. Conversely, the proposed scheme will ensure the successful delivery of a crucial town centre scheme, which is proposed for allocation in the HTCAAP and which is already identified in the adopted Core Strategy.

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[13] Most of the Atkins Factory site is also mostly outside of the Town Centre Boundary as defined on the plan in Appendix 3 to the emerging HTCAAP. However, part of that site is within the defined Town Centre Boundary and so we considered it as part of our Sequential Site Assessment in Section 5.

Impact of the Proposal on In-Centre Trade/Turnover and on Trade in the Wider Area

6.44 We have undertaken a detailed assessment of the likely impacts of the proposed scheme on the trade/turnover of existing centres and stores located within and beyond the catchment area. Our assessment considers in turn the impacts of the proposed convenience and comparison floorspace, and also assesses both the solus impact of the application scheme and its cumulative impact, in association with other committed retail developments.

6.45 Before we provide details of the impacts that we have identified, it is important to briefly outline the methodology we have employed for our assessment of trade draw. Firstly, we note that our assessment is based on a 'worst-case' scenario, whereby all of the turnover requirements of the proposed scheme are drawn from residents of the catchment area. In practice, we expect that at least 10 per cent of the turnover of the scheme will be drawn from residents located beyond the catchment area, for example from residents living to the north-east of the Borough and also residents of north-east Harborough District. However, in order to take a cautious approach to our assessment, we have not factored any inflow into our impact model.

6.46 The assessment examines the impact on existing stores and centres, once the application scheme has been constructed and opened to the public, and settled trading patterns have been established, which will be in 2021. However, for completeness, we also consider impacts at 2015, which is five years from the date of submission of the application, as required by Policy EC16.1d of PPS4.

6.47 Our assessment of trade diversion impacts follows a standard step-by-step methodology, which can be summarised as:

First, we estimate the uplift in convenience and comparison goods turnover which the application scheme will generate at the Bus Station site, taking into account the likely turnover of each of the proposed units, and the benchmark turnover of the existing units that will be demolished as part of the scheme. As we explained earlier in this section, by 2015 we expect that the scheme will generate a net uplift in comparison turnover of £40.6m, and a net uplift in convenience turnover of £43.7m.

Second, we have assessed the pattern of the application scheme's likely trade draw, which is the proportion of its turnover that is anticipated to be drawn from residents of each of the seven catchment area zones. The pattern of trade draw is informed by our analysis of existing shopping patterns, as established by the 2007 household survey, but adjusted to take into account the unique characteristics of the proposed scheme. Our estimates of the trade draw from residents of each of the survey zones are set out in Spreadsheet IP1 and IP8 in Appendix 6.

Third, we have undertaken a similar exercise with respect to the five retail commitments[14] within the catchment area, having estimated their likely annual convenience and comparison turnovers.

Fourth, we have assessed – for the application scheme and for each of the five commitments – where the turnover drawn from residents of each survey zone is most likely to have been diverted from. This allocation between stores has been determined with regard to: the type of floorspace proposed and the services offered relative to competing stores; the location and accessibility of the proposal relative to other stores; and the existing patterns of spend revealed by the household survey. In order to ensure a transparent approach, we have weighted the impact on each centre (between 0 and 1), whereby the centres/stores which we consider are most likely to be impacted by the application scheme are attributed a weighting of 1, and centres/stores which are not likely to be affected are attributed a weighting of 0.

Fifth, the resultant trade diversions are expressed as a proportion of the constant market share turnovers that are assumed to be achieved by the various centres, under a no development scenario, and assuming that each centre would benefit from expenditure growth in line with its existing market share.

Impact of the proposed convenience floorspace

6.48 The proposed scheme includes a food superstore, which for the purposes of our assessment we have assumed will provide 4,213 sq.m of convenience sales floorspace.

Solus impact

6.49 Spreadsheet IP1 in Appendix 6 shows that a high proportion (41 per cent) of the convenience turnover of the proposed scheme will be drawn from residents of Zone 1, which is to be expected given the localised nature of convenience shopping patterns. The foodstore is also likely to attract residents who live towards the north-east of Zone 2, as well as some residents who live in neighbouring Zones 3 and 7. However, the store is unlikely to attract significant levels of convenience expenditure from residents who live further afield, in Zones 4, 5 and 6, who benefit from closer proximity to other large foodstores.

6.50 The anticipated solus pattern of convenience trade diversion is set out in full in Spreadsheet IP4 and summarised in Spreadsheet IP6 in Appendix 6. The Spreadsheets show that the greatest convenience trade draw to the proposed foodstore is likely to be from existing, nearby food superstores, because the offer of these stores is closely comparable to the proposed foodstore. In particular, we note that residents of Zones 1 and 2 - who currently principally travel to the north of Hinckley to visit the out-of-centre Asda and Morrisons stores – may now choose to visit the similar-sized but more centrally located food superstore. There is also likely to be some trade diversion from the Tesco

[14] The five commitments comprise: two comparison retail schemes (for mixed-use development of the Jarvis Porter site, and redevelopment of four retail units along Castle Street, Hinckley); and three foodstore schemes (for a Tesco Express in Hinckley, a Tesco Express in Barwell, and a change of retail use in Burbage).

and Lidl stores, which are located to the south of Hinckley Town Centre, if residents who currently shop in these stores decide to switch to the proposed superstore, which will provide a larger range of products. A summary of the main solus trade diversion impacts is provided in Table 6.2 below.

6.51 Table 6.2 shows that the highest diversion of trade will be from the existing, similar-sized superstores in Zone 1, namely the Asda and Morrisons stores, which are located to the north of Hinckley Town Centre and will experience trade diversions of £16.0m and £11.4m, respectively, which equates to impacts of 24 per cent and 25 per cent. The application scheme will also have an impact on the existing Tesco and Lidl stores – at 34 per cent and 29 per cent, respectively - which are located in relatively close proximity to the application site, to the south of Hinckley Town Centre.

6.52 Although Table 6.2 indicates that the impact on these four existing foodstores will be relatively high at 2015 (being at or above 24 per cent), it is notable that all four of the stores are located out-of-centre, and benefit from no policy protection from PPS4. The application scheme, in contrast, will provide an accessible food superstore, located directly adjacent to Hinckley bus station, and will plug a key deficiency in the town centre's existing convenience offer, with potential to encourage more linked trips with existing town centre shops and services.

Table 6.2 – Summary of Solus Convenience Impact of the Application Scheme

Centre/Store	Solus Trade Diversion to Application Scheme (in £m)	Solus Trade Impact of Application Scheme (%)
Tesco, Hawley Road, Hinckley	5.2	-34%
Lidl, Hawley Road, Hinckley	1.0	-29%
Morrisons, Stoke Road, Hinckley	11.4	-25%
Asda, Barwell Lane, Hinckley	16.0	-24%
Somerfield, Horeston Grange	0.5	-11%
Extra Foodstore, Main Street, Broughton Astley	0.7	-11%
Co-op, Wood Street, Earl Shilton	0.4	-6%
Stores in Hinckley Town Centre	0.3	-5%

6.53 It is also notable that at least three of the four existing foodstores in the Hinckley zone (Zone 1) are over-trading, as shown in Spreadsheet IP7 in Appendix 6, and as summarised in Table 6.3 below. Indeed, by 2015 - if no competition is introduced into the local market - the Asda store at Barwell Lane will have a turnover of £66.7m, which is a very significant £39.2m higher than its company average benchmark turnover of £27.5m[15]. Similarly, by 2015 the Morrisons supermarket at Stoke Road will be over-

[15] The 2015 turnover figures are derived from the 2007 household survey results, but rolled forward to take account of improvements in floorspace efficiency. The benchmark turnover figures are calculated through

trading by £20m, and the Lidl store at Hawley Road would be over-trading by £1.2m. It is not possible for us to measure the current performance of the fourth foodstore – the Tesco at Hawley Road – against its company benchmark, because at the time of our 2007 household survey the store was operated by Somerfield, and so we have no survey-derived turnover estimate for the Tesco store.

6.54 Spreadsheet IP7 and Table 6.3 show that even if the current application scheme is approved and implemented, the Asda, Morrisons and Lidl stores will continue to over-trade. Indeed, if account is also taken of trade diversion to the three extant commitments for convenience retail development in the catchment area – which we discuss in more detail below – the three stores will all still trade above their company average convenience benchmark.

6.55 We consider, therefore, that the existing out-of-centre foodstores in Hinckley are currently trading strongly, and that their viability will not be threatened by the application scheme. We also note that the current, significant level of over-trading achieved by the out-of-centre foodstores highlights the existing shortage of convenience floorspace in the catchment area, and confirms that there is a substantial quantitative and qualitative need for an additional food superstore in Hinckley, to meet local residents' food shopping needs. The application scheme will address these needs, by providing a modern foodstore in a central location, as part of a new mixed-use scheme.

Table 6.3 – Summary of the Trading Performance of the Out-of-Centre Foodstores Against Company Benchmarks, at 2015 (in £m)

Foodstore	Benchmark Turnover	Turnover – no development	Turnover - with the application scheme	Turnover – with the application scheme and commitments
Asda, Barwell Lane	27.5	66.7	50.6	47.9
Morrisons, Stoke Road	26.0	46.0	34.6	32.8
Lidl, Hawley Road	2.1	3.3	2.4	2.2

6.56 As Table 6.2 shows, the application scheme may also divert trade and have some impact on the smaller stores located throughout the Borough, such as the Somerfield store at Horeston Grange (11 per cent), the Extra Foodstore on Main Street, Broughton Astley (11 per cent), and the Co-op at Wood Street, Earl Shilton (6 per cent). We do not consider, however, that the viability of these three stores will be materially threatened by the application scheme. Each of these stores has an important role to play in meeting the 'top-up' food and grocery needs of the local residents in Horeston Grange, Broughton Astley and Earl Shilton, and the stores will continue to perform this role and function. Indeed, Spreadsheet IP7 shows that the Co-op in Earl Shilton and the Extra Foodstore in Broughton Astley both perform very strongly at present (in comparison to their company

multiplying the convenience sales area floorspace of each store (derived from IGD) by the company average goods-based sales density (derived from Verdict).

average benchmark turnover), and we do not consider that the proposed foodstore will undermine the viability of these stores.

6.57 A very small proportion of the convenience turnover of the proposed food superstores will also be diverted from the existing traders in Hinckley Town Centre. However, we note from the outset that there are few convenience outlets present in the town centre which could be affected. Our health check of Hinckley, which is presented in Appendix 5, shows that there are currently only 19 convenience outlets in Hinckley. Out of these units, the existing dated and constrained Sainsbury's and Iceland stores will be demolished as part of the application scheme, and will be replaced by a modern food superstore. Furthermore, several of the existing units serve a specialist market, providing take-away sandwiches, health food, or confectionary, and will not compete directly with the proposed superstore (for example, Baker's Oven, Greggs, The Sweet Jar, Thorntons, Holland and Barrett, Natural Choice and Sweets and Treats).

6.58 There are, however, three butchers, two greengrocers, a bakery, an off licence and several newsagents that may be slightly affected by the scheme, and Spreadsheets IP4 and IP6 show that the impact is likely to be around 5 per cent (or £0.3m), at 2015, which we do not consider to be material. These existing independent convenience stores already successfully compete with large-format superstores, which are located on the outskirts of Hinckley, and we consider that the stores will similarly be able to trade alongside the proposed foodstore scheme, with the specialist offer of the independents complementing the main food products available in the new store. We certainly do not consider that a trade diversion of £0.3m, which will be distributed across several retailers, will undermine the viability of these stores.

6.59 In summary, we do not consider that the proposed scheme will have a detrimental solus impact on any of the existing in-centre and out-of-centre convenience stores in the catchment area.

Cumulative impact

6.60 There are three extant permissions for small foodstores within the catchment area, and it is necessary to take account of the cumulative impact of these commitments in our assessment. The three commitments are for:

- the redevelopment of the Tesco Express at London Road, Hinckley[16] (ref. 08/00317/FUL), which will generate a net uplift in convenience turnover of £2.0m by 2015;
- the change of use of the Burbage Liberal Club at Lutterworth Road, Burbage for convenience retail use (ref. 09/00321/COU), which will generate a convenience turnover of £1.1m by 2015; and

[16] The redevelopment of the Tesco express was completed at 1 September 2008. However, it is included as a 'commitment' for the purposes of this assessment since this succeeds the 2007 household survey on which this assessment is based.

a new Tesco Express at High Street, Barwell (ref. 08/01022/FUL), which will generate a convenience turnover of £3.9m at 2015.

6.61 In total, the three commitments will generate a convenience turnover of £7.0m at 2015. By using each of the three applicants' own impact assessments as a base, and also by applying our own professional judgement, we have modelled the likely patterns of trade diversion to the three committed schemes. We present our cumulative impact assessment in full in Spreadsheet IP5 in Appendix 6, and in summary form in Spreadsheet IP6.

6.62 Spreadsheets IP5 and IP6 show – as would be expected - that the main impact of the application scheme and commitments will still be on the existing food superstores in Hinckley, namely the Asda at Barwell Lane, the Morrisons at Stoke Road, and the Tesco and Lidl stores at Hawley Road. As we explain above, these out-of-centre stores are trading strongly and are well-placed to absorb the levels of impact that we have identified.

6.63 In addition to the impact on stores already discussed above, Spreadsheets IP5 and IP6 show that there will also be a cumulative impact on the Co-op at Mill Bank, Barwell (of 24 per cent), on other stores in Barwell (of 27 per cent), and on other stores in Zone 2 (the Burbage zone, of 8 per cent). It is important to note, however, that the majority of the trade impact on stores in Barwell and Burbage is a direct result of the already committed schemes, and very limited additional impact will arise as a result of the application store (as is evident in Spreadsheet IP6, which shows that the solus impact of the application scheme on stores in Barwell is actually 0 per cent, and is only 4 per cent in the case of stores in Burbage). In any case, the cumulative impact assessment also shows that overall – taking into account the turnover that will be generated from the committed schemes – there will be a positive impact on Barwell and Burbage, of 116 per cent and 25 per cent, respectively.

6.64 The cumulative impact of the committed schemes on convenience traders in Hinckley Town Centre will also be slightly higher than the solus impact, because some residents who currently undertake 'top-up' shopping in the town centre may choose to shop at the new Tesco Express store in Hinckley. As a consequence, Spreadsheet IP6 shows that the cumulative impact of the schemes on Hinckley Town Centre will be 8 per cent at 2015, reducing to 7 per cent by 2021. We consider, however, that the impact on convenience stores in Hinckley Town Centre is not at a level which will undermine the performance and viability of the existing traders, which will continue to perform a niche role providing local residents with specialist food and grocery products.

Summary in relation to the impact of the proposed convenience floorspace

6.65 Overall, we conclude that the application scheme will not have an unacceptable impact on the convenience stores in Hinckley Town Centre or any other centre, both when the proposed scheme is considered on its own, and cumulatively with extant retail commitments.

6.66 The main impact will be on the existing, similar-sized out-of-centre foodstores, as trade will be diverted to the more centrally located and accessible food superstore. Indeed, it is anticipated that the application scheme will function as an integral part of the town centre, and in this respect the proposed development could actually be considered to have a positive net impact on the convenience turnover of Hinckley, of 586 per cent (cumulative assessment) by 2015.

6.67 Finally, it should also be noted that the diversion of convenience expenditure to the proposed scheme, from out-of-centre stores, will also generate 'spin-off' benefits for other town centre traders, as some shoppers will make 'linked' trips in association with their visit to the store. These positive 'spin-off' benefits are not factored into our impact assessment, as presented in Appendix 6, but will inevitably occur and will help to balance out the negative impacts of trade diversion that have been identified (although these impacts themselves have not been shown to be material).

Impact of the proposed comparison floorspace

6.68 The application scheme proposes 18 non-food units, which together will contain 6,834 sq.m of comparison sales floorspace. We cannot provide details of individual operators at this stage, for reasons of commercial confidentiality. However, we expect that the units will be occupied a variety of retail operators, covering the clothes and shoes, health and beauty, and household goods sectors. The applicant's aspiration is to provide a range of mid-market retail operators, to plug the current deficiencies in the comparison sector in Hinckley Town Centre.

6.69 The proposed anchor superstore will also include some non-food floorspace (2,075 sq.m sales area), which will mainly be used for the sale of health and beauty products, small household goods, clothing, pet food, toys, stationery, and books, CDs and DVDs. In total, therefore, the scheme will provide 8,910 sq.m of comparison sales floorspace, which will generate a net uplift in comparison turnover of £40.6m by 2015.

Solus impact

6.70 We anticipate that the application scheme will draw trade from all seven zones of the catchment area, and will have a very similar pattern of trade draw to the existing shops and services in Hinckley Town Centre. As such, in Spreadsheet IP8 of Appendix 6, we have modelled the existing pattern of trade draw to Hinckley Town Centre, and have applied this model to the turnover of the application scheme.

6.71 Thus, we anticipate that the majority of the scheme's turnover (66 per cent) will be derived from residents of Zones 1, 2 and 4, whilst a further 15 per cent will be drawn from residents of Zone 6, and 9 per cent from residents of Zone 7. In line with the current catchment of the town centre, only 8 per cent of the scheme's turnover will be derived from residents of Zone 5, as these residents are likely to continue to primarily shop in Leicester, whilst only 1 per cent of the scheme's turnover will be derived from residents of Zone 3, where residents are likely to continue to visit nearby Nuneaton for non-food shopping.

6.72 The anticipated solus pattern of comparison trade diversion is set out in full in Spreadsheet IP11 and is summarised in Spreadsheet IP13 in Appendix 6, and in Table 6.4 below.

Table 6.4 – Summary of Solus Comparison Impact of the Application Scheme

Centre/Store	Solus Trade Diversion to Application Scheme (in £m)	Solus Trade Impact of Application Scheme (%)*
Hinckley Town Centre	13.9	-10%
Leicester City Centre	8.2	-2%
Fosse Park, Leicester	8.0	-
Nuneaton Town Centre	4.3	-2%
Other, Outside Catchment Area	2.9	-
Coventry City Centre	1.0	-0%
Hinckley Retail Park, Sword Drive	0.6	-10%

* We do not have survey-based turnover estimates for the centres located outside the catchment area from which to calculate the percentage impact of the scheme on these centres. However, we have derived the turnover of Leicester City Centre from the Leicester City Retail Capacity Study (2007), which finds that Leicester has a turnover of £469.8m. We have applied our own assumptions in relation to floorspace efficiency improvements to arrive at the 2015 turnover figure of £500m. We have similarly estimated the 2015 turnover of Nuneaton Town Centre (£204m) and Coventry City Centre (£712m) from our West Midlands Regional Spatial Strategy – Regional Centres Study (2006).

6.73 Table 6.4 shows – as might be expected – that the highest diversion of trade (£13.9m) will be from the nearby existing shops in Hinckley Town Centre, which equates to an impact of 10 per cent at 2015, falling to 9 per cent by 2021. Although the application scheme has been specifically designed to complement the existing offer in Hinckley Town Centre, and plug gaps in existing retail representation, it is still inevitable that there will be some degree of overlap between the application scheme and the existing shops in Hinckley, and that there may be some diversion of trade to the new stores.

6.74 However, we do not consider that an impact of 9 to 10 per cent will undermine the vitality and viability of the existing primary shopping frontage in Hinckley Town Centre. Our health check of Hinckley, which is presented in Appendix 5, shows that the town centre is relatively stable, and we do not consider that the level of impact projected will materially undermine the current performance of the town centre.

6.75 Conversely, we consider that the application scheme – which is in an accessible location and will function as part of the town centre - will actually improve the vitality and viability of Hinckley, through generating increased levels of footfall, improving the environment of a gateway site, and addressing current deficiencies in the retail, service and commercial leisure offer. Indeed, if the proposed development – which will bring vital new investment - is considered as an integral part of the town centre, then the scheme will actually have a net positive impact on the comparison turnover of Hinckley, of 19 per cent by 2015.

6.76 Moreover, the application scheme is likely to generate 'spin off' benefits for other convenience and comparison traders in Hinckley Town Centre, and these positive impacts – which are not taken into account in our impact assessment in Appendix 6 – will help to balance out any adverse impact of trade diversion. Indeed, we anticipate that the proposed development will encourage local residents - who currently travel further afield to visit alternative centres and out-of-centre destinations - to visit Hinckley Town Centre, and the new visitors may well undertake 'linked' trips to other parts of the town centre.

Certainly, the proximity of the application site to the existing retail and service offer will enable linked trips to be easily made, and this will provide new trade for town centre shops.

6.77 We consider that the proposed development will act as a new 'anchor' in Hinckley, and will strengthen the retail circuit through the town centre, as shoppers move between Castle Street and the application site, via Station Road and Regent Street. The increase in footfall along these presently secondary streets is likely to improve the trading conditions in these areas, which have suffered recently from a rise in vacant units. Overall, therefore, we consider that the impact of the scheme on town centre comparison retailers will be largely positive.

6.78 Table 6.4 shows that the application scheme will also divert £0.6m of trade from the retail park at Sword Drive, Hinckley. Although this represents a relatively small amount of trade diversion in absolute terms, we note that it will result in a 10 per cent impact on the turnover of the retail park. We do not consider, however, that this level of impact will seriously threaten the vitality and viability of the out-of-centre retail park, which primarily sells 'bulky' comparison goods, generally not available in the existing stores in Hinckley Town Centre, or in the stores proposed as part of the application scheme.

6.79 In addition to the existing shops in Hinckley, the application scheme will principally draw its comparison trade from large competing centres nearby, such as Leicester City Centre (£8.2m), Nuneaton Town Centre (£4.3m) and Coventry City Centre (£1.0m), and from the out-of-centre retail provision at Fosse Park, Leicester (£8.0m). As we explain above, the application scheme will provide Hinckley with a range of modern, middle-order comparison retailers, in addition to a new food superstore, several restaurants, a cinema and bowling alley/family entertainment centre, which will increase the attraction of Hinckley Town Centre and claw-back local expenditure that currently flows to larger centres outside the Borough. In particular, we note that residents of Zones 1 and 2, who live in very close proximity to the application site, may now choose to visit the improved retail offer in Hinckley Town Centre, rather than travelling further afield.

6.80 The levels of trade draw projected from Leicester, Fosse Park, Nuneaton and Coventry will not, however, have any material level of impact on these destinations, which have high annual turnovers. For example, Leicester City Centre will have a comparison turnover of around £500m in 2015, and so the projected trade diversion to the application scheme of £8.2m will represent an impact of less than 2 per cent, which we do not consider to be material in the context of a healthy city centre.

6.81 In summary, we do not consider that the proposed scheme will have a detrimental solus comparison impact on Hinckley Town Centre, or any other centres located within or beyond the catchment area.

Cumulative impact

6.82 There are two extant permissions for comparison retail development in the catchment area, and it is necessary to take account of the cumulative impact of these commitments in our assessment. The two commitments are for:

- the mixed-use redevelopment (to include retail warehousing) of the Jarvis Porter Site at Coventry Road, Hinckley (ref. 07/00231/OUT), which will generate a comparison turnover of £14.1m at 2015; and
- the redevelopment of four retail units at Castle Street, Hinckley (ref. 08/00127/FUL), which will generate a net uplift in comparison turnover of £0.9m by 2015.

6.83 We note from the outset, however, that the two extant commitments are unlikely to have a material affect on trading patterns in the catchment area. For example, the Castle Street scheme will only result in a minor uplift in comparison floorspace and turnover, and since this site is located in the heart of the primary shopping area, any impacts associated with this scheme should be positive. Furthermore, we note that the emerging HTCAAP states in proposed Policy 11 that if the extant permission for re-development of the Jarvis Porter Site expires, 'the Council will seek to retain this site for employment uses'.

6.84 Nevertheless, for the sake of completeness, we have produced a cumulative impact assessment to take account of the two retail commitments, which theoretically would generate a comparison turnover of £15.0m at 2015. By using the applicants' own impact assessments as a base, and also by applying our own professional judgement, we have modelled the likely patterns of trade diversion to the two committed schemes. We present our cumulative impact assessment in full in Spreadsheet IP12 in Appendix 6, and in summary form in Spreadsheet IP13.

6.85 Spreadsheet IP13 shows that the main difference between the solus and the cumulative impact model is that the impact on Hinckley Town Centre is slightly higher under the cumulative impact scenario (rising from 10 per cent at 2015 under the solus scenario, to 15 per cent under the cumulative scenario). This is primarily a consequence of taking account of the Jarvis Porter Site commitment. However, we do not consider that a cumulative impact on town centre comparison traders of 15 per cent at 2015 - reducing to 13 per cent by 2021 - will be overtly detrimental to the overall health and vitality of the town centre.

6.86 If the application scheme is approved and implemented, in addition to the Castle Street commitment, the town centre will itself benefit from positive investment, a range of new shops and restaurants, increased footfall and 'spin-off' benefits for existing traders, as described in the solus impact section above. Furthermore, if the application scheme is regarded as integral to the town centre, then under the cumulative impact scenario, there would actually be a positive impact on the town centre of 15 per cent at 2015.

Summary in relation to the impact of the proposed comparison floorspace

6.87 Overall, we conclude that the application scheme will not have an unacceptable impact on the comparison stores in Hinckley Town Centre or any other centre, both when the proposed scheme is considered on its own, and cumulatively with extant retail commitments.

6.88 Much of the trade draw will be from neighbouring, large competitor centres, such as Leicester, Nuneaton, Coventry, and the out-of-centre retail provision at Fosse Park. This is because the application scheme will claw-back expenditure that currently leaks to these destinations, through the provision of an accessible, modern, high-quality mixed-use scheme in Hinckley, which will be attractive to local residents.

6.89 Although there is likely to be some trade draw from existing comparison retailers in Hinckley Town Centre, on balance we consider that the scheme will have a largely positive impact on Hinckley. The scheme will address current deficiencies in the town centre's retail, service and leisure offer; increase footfall; create an attractive southern gateway to the town centre; enhance the public bus station; and thus add to the vitality and viability of Hinckley. Indeed, we expect that the scheme will function as an integral part of the town centre, and there will be potential for 'spin off' benefits for other town centre traders, which will help to outweigh any adverse impacts of trade diversion.

Impact of the proposed restaurants and cafés, and commercial leisure provision

6.90 Finally, in relation to trade impact, we note that the other uses proposed as part of the application scheme – namely the five restaurants and cafés, the offices, the cinema and the bowling alley – will not have any adverse impacts in terms of trade diversion from Hinckley Town Centre. Indeed, these uses will have a significant positive effect on the vitality and vitality of the town centre.

6.91 There is currently no commercial leisure provision in the town centre, and so the cinema and bowling alley will fill this key qualitative gap. Furthermore, as we established in the RCS, the town centre's existing provision of restaurants/eateries is lacking in both quantitative and qualitative terms. Whilst there is representation from a range of national fast food outlets - and some national pub/bar chains which sell food, catering primarily for the 18-30 age group - there is a clear need for new restaurants and family friendly eateries that cater for a wider client base. The proposed development will address this qualitative deficiency by providing an appealing choice of restaurants/cafés, which will diversify and enhance the offer rather than competing directly with existing outlets.

6.92 The leisure uses that are proposed as part of the scheme will therefore significantly enhance the evening economy and diversity of uses in Hinckley Town Centre, rather than undermine the existing offer. This is entirely consistent with Policy EC4 of PPS4, which encourages local planning authorities to promote competitive town centre environments and enhance consumer choice by supporting a diverse range of complementary evening and night-time uses which appeal to a wide range of age and social groups. The uses which are specifically encouraged in town centre locations by Policy EC4.2a include cinemas, restaurants and cafés.

Scale

6.93 Policy EC16.1 of PPS4 states that 'if located in or on the edge of a town centre', it is necessary to consider whether a proposal is of an appropriate scale (in terms of gross floorspace) in relation to the size of the centre and its role in the hierarchy of centres. The application scheme will provide 25,218 sq.m of gross floorspace overall in a presently edge-of-centre location, including 19,438 sq.m of retail floorspace, and so it is necessary to consider the appropriateness of its scale.

6.94 The first point to emphasise is that the application scheme is entirely consistent with the approved Core Strategy, which provides an indication of the scale of new development that would be appropriate at the application site. It therefore follows that the proposed development is of an appropriate scale.

6.95 Secondly, we note that we have identified a quantitative and qualitative need for the proposed quantum of retail floorspace. Indeed, Scenario B of our updated retail capacity assessment, which is presented in Appendix 4, shows that over the period of the Core Strategy and the emerging HTCAAP (which both run up to 2026), there will be £52.3m of surplus comparison expenditure capacity, more than sufficient to support the additional comparison floorspace proposed by the scheme (which will generate an uplift in comparison turnover of around £46.1m in 2026).

6.96 Furthermore, our ‘health check’ of Hinckley found that the town centre has a limited convenience goods offer, with no food superstore to compete with the out-of-centre offer towards the north of the town. The comparison retail offer in the centre is also in need of enhancement. Although Hinckley currently provides a reasonable number of non-food outlets, the existing shop units are typically small and out-dated, and are generally occupied by retailers that focus on the value and lower end of the market. There is thus a need for some modern retail units, to accommodate higher quality outlets. The town centre also currently lacks an active evening economy, with an under-provision of restaurants and cafés, and an absence of family entertainment venues. As a result, footfall in the town centre currently drops off significantly outside normal shop opening hours.

6.97 The application scheme has been designed specifically to meet these key qualitative deficiencies in Hinckley’s town centre offer. We thus consider that the scale of the application proposal (both in terms of the retail and commercial leisure offer) is appropriate to meet the quantitative and qualitative needs identified.

6.98 Furthermore, we note that Hinckley is the main centre within the Borough, by some margin. Indeed, our 2007 household survey found that Hinckley town centre achieves a comparison market share of around 28 per cent, whilst no other centre within the OCA achieves a market share of more than 2 per cent. The application scheme will not, therefore, elevate the position of Hinckley in the local retail hierarchy, but will consolidate the existing role and function of the Hinckley as the main town centre within the Borough.

6.99 Similarly, whilst the application scheme is intended to address deficiencies in the town’s existing retail and commercial leisure offer, and improve Hinckley’s vitality and viability, the proposed development will not elevate Hinckley in the sub-regional retail hierarchy, to the level of competing centres such as Nuneaton and Leicester. Indeed, even when the additional retail floorspace proposed by the application scheme is taken into account, Hinckley Town Centre will still only provide 59,508 sq.m of gross A1 floorspace, compared to 82,300 sq.m in Nuneaton Town Centre, and 295,700 sq.m in Leicester City Centre[17].

6.100 Finally, we note that the application scheme will not alter the catchment area of Hinckley Town Centre or encourage unsustainable travel patterns. We anticipate that the scheme will draw trade from across Hinckley and Bosworth Borough, just as existing shops and services in the town centre do, and as would be expected given that Hinckley is the main centre in the Borough. However, we do not expect that the scheme will draw material levels of trade from beyond the Borough, where people can more easily access shops and services in competing centres, such as Leicester, Nuneaton and Coventry. Furthermore, we note that the scheme will improve the local appeal of Hinckley Town Centre and will claw-back expenditure that currently leaks beyond the Borough to the large centres listed above. By encouraging local residents to shop at their nearest centre (Hinckley), the application scheme will reduce the number and length of journeys that are made by car, thereby encouraging more sustainable shopping and leisure patterns.

6.101 In summary, we conclude that the application scheme is of an appropriate scale for Hinckley Town Centre. The proposed development has been designed specifically to address identified deficiencies in the existing retail and commercial leisure offer, and is of a scale appropriate to the needs identified. The scheme will improve the vitality and viability of the existing town centre, but will not fundamentally alter the role and function of the centre.

Locally Important Impacts on Centres

6.102 Policy EC3 of PPS4 explains that as part of the Local Development Framework, LPAs can define any locally important impacts on centres which should be tested. Although Hinckley and Bosworth's recently adopted Core Strategy and emerging HTCAAP have not yet been updated to reflect this stipulation, these policy documents can still be used to provide an early indication of the issues which may be considered important at the local level.

6.103 One issue, which is particularly pertinent to the current application, is the Council's aspiration to improve the vitality and viability of Hinckley Town Centre. Indeed, Spatial Objective 2 of the adopted Core Strategy is: 'to deliver the regeneration of Hinckley Town Centre, as a vibrant, thriving sub-regional centre, which provides opportunities for retail, leisure and commercial activities'. The Core Strategy goes on to explain that Hinckley is currently underperforming as a sub-regional town centre due to a number of factors, including lack of investment, poor quality public realm, a low retail and cultural offer, vacant property, and limited night-time economy.

6.104 The emerging HTCAAP goes on to identify specific proposals to address these deficiencies in Hinckley's town centre offer, through the redevelopment of nine 'Strategic

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[17] Gross A1 retail floorspace data from the State of the Cities Database, 2004. It should be noted that this source is now somewhat historical and so the current amount of A1 floorspace is likely to be greater than 2004, particularly in the case of Leicester City Centre.

Development Areas'. The application site is identified as one such SDA, and proposed Policy 9 specifies the Council's key aspirations for the site's redevelopment, which are to:

- provide an enhanced bus station and associated passenger facilities;
- create an exciting landmark development at this key gateway site;
- provide a mixed-use scheme anchored by a food superstore, with other potential uses including office/commercial floorspace, cafés, restaurants, comparison retail units, a cinema and other leisure uses;
- achieve high quality public realm improvements including improved pedestrian connectivity within the site and to other parts of the town centre;
- improve links to Hinckley railway station; and
- provide a consolidated car park of approximately 560 spaces.

6.105 The application scheme is fully in accordance with this specification and will help the Council to achieve its aspiration to improve the vitality and viability of Hinckley Town Centre by addressing current deficiencies in the retail and leisure offer and helping to claw-back local expenditure that currently leaks to destinations further afield.

Summary

6.106 The application scheme will deliver the redevelopment of the Bus Station site – which is one of the Council's key aspirations – and will secure substantial investment in the town centre. Our updated capacity assessment has shown that there will still be sufficient expenditure capacity to support a redevelopment scheme at the Britannia Centre/Castle Street. In our assessment, the application scheme will have both direct and indirect positive impacts on the town centre's investment prospects.

6.107 The proposed development will improve the vitality and viability of Hinckley Town Centre, as it will improve consumer choice, address specific deficiencies in the existing offer, and improve the range and quality of the food, non-food and commercial leisure sectors.

6.108 The scheme will not adversely affect the development prospects of any out-of-centre site that is either allocated for redevelopment or proposed for allocation. Conversely, the scheme will ensure the delivery of a crucial town centre scheme, which is proposed for allocation in the HTCAAP and which is already identified in the adopted Core Strategy.

6.109 Our impact assessment shows that the application scheme will not have an unacceptable impact on the convenience or comparison stores in Hinckley Town Centre or any other centre, both when the proposed scheme is considered on its own, and when it is considered cumulatively with extant retail commitments. The main convenience impact will be on the existing, similar-sized out-of-centre food superstores, and much of the comparison trade draw will be from neighbouring, large competitor centres, such as Leicester, Nuneaton, Coventry and the out-of-centre retail provision at Fosse Park.

6.110 Although there will inevitably be some trade draw from existing retailers in Hinckley Town Centre, on balance we consider that the scheme will have a largely positive impact on Hinckley. The scheme will: address current deficiencies in the town centre's retail, service and evening economy/leisure offer, thereby boosting the centre's vitality and viability;

increase footfall; create an attractive southern gateway to the town centre; and it will provide a new bus station. We expect that the scheme will function as an integral part of the town centre, with 'spin off' benefits for other town centre traders which will help to outweigh any adverse impacts of trade diversion.

6.111 The application scheme is clearly of an appropriate scale for Hinckley Town Centre. The proposed development has been designed specifically to address identified deficiencies in the existing retail and commercial leisure offer, and is of a scale appropriate to the needs identified. The scheme will improve the vitality and viability of the existing town centre, but will not fundamentally alter the role and function of the centre.

6.112 Overall, the proposed scheme is consistent with the Council's strategy to improve the vitality and viability of Hinckley Town Centre, it will address current deficiencies in the retail and leisure offer, and it will help to claw-back local expenditure that currently leaks to destinations further afield.

6.113 For the reasons outlined above, we conclude that the proposed scheme satisfies the six impact criteria that are set out in Policy EC16.1 of PPS4.

7 SUMMARY OF FINDINGS, AND OVERALL CONCLUSION

Consistency with the Local Planning Policy Background

7.1 The Borough-wide Retail Capacity Study (‘RCS’) identified a quantitative need for up to 13,100 sq.m of comparison sales floorspace, and 5,300 sq.m of convenience sales floorspace, in the period up to 2021. These retail capacity figures have been adopted by the Council in its Core Strategy and also form the basis for the emerging Hinckley Town Centre Area Action Plan (‘HTCAAP’). As well as new retail development which is required to revitalise the shopping offer and capture some of the expenditure that presently leaks out of the Borough, the Core Strategy and the HTCAAP identify a need for a new cinema and associated leisure uses in order to add a leisure dimension to the town centre, and they also advocate the provision of a new town centre bus station and a new public car park. All of this will bolster Hinckley's role as a sub regional centre.

7.2 Following an extensive assessment of potential sites, the Bus Station site was chosen by the Council as the key town centre opportunity capable of delivering a scheme with the critical mass to secure the Core Strategy's objectives in a single and comprehensive development. Accordingly, the Council prepared a Development Brief for the site and selected a developer (the applicant) to deliver a high quality mixed-use scheme.

7.3 The proposed development has been specifically designed to deliver the Council's objectives for the site. It will provide a new food superstore, 18 comparison retail units, a cinema, a bowling alley/family entertainment centre, several cafés and restaurants, and new offices, as well as a new town centre bus station and a new public car park. The scheme will provide high quality, well-configured units to attract new retailers and commercial leisure operators to Hinckley, which are required in order to address the current deficiencies in the town centre offer and stem the persistent leakage of expenditure to destinations outside of the Borough.

7.4 Accordingly, the proposed development will deliver a high-quality mix of retail, leisure and complementary uses at a key town centre site, consistent with the vision for the site that is set out in the adopted Core Strategy and in the emerging HTCAAP.

Site Selection and Land Assembly for Main Town Centre Uses

7.5 Policy EC5 of PPS4 requires LPAs to identify an appropriate range of sites to accommodate the needs that have been identified, taking account of five key considerations. In identifying the Bus Station site as an appropriate location for a major, retail-led development, the Council followed to the approach set out in Policy EC5, as summarised below:

i) Need – Policy 1 of the Core Strategy supports the development of 13,100 sq.m of comparison sales floorspace, and 5,300 sq.m of convenience sales floorspace, in the period up to 2021. These floorspace requirements, which are based on the evidence from the RCS, are substantial and therefore require sites with a sufficient critical mass.

ii) Scale – LPAs are required to ensure that the scale of the sites identified, and the level of travel they generate, are in keeping with the role and function of the centre within the hierarchy of centres and the catchment served. The scale of floorspace requirements that is identified in Policy 1 of the Core Strategy – and the town centre sites identified to meet these requirements, including the Bus Station site – is based on the needs identified in the RCS.
iii) Sequential approach – as we explained above, the Council chose the Bus Station site as the key town centre opportunity for delivering identified needs following an extensive assessment of potential sites, which was undertaken in accordance with the sequential approach to site selection.
iv) Impact – the Bus Station site is located within the town centre and so the impacts associated with delivering a substantial town centre scheme in that location are mainly positive, as we have demonstrated in this Retail Statement.
v) Physical regeneration and socio-economic benefits – the redevelopment of the Bus Station site will make more efficient use of previously developed land located in a highly sustainable location, significantly improving the physical appearance of the site, its relationship with surrounding land uses and the southern approaches to the town centre. It will also deliver a range of beneficial socio-economic impacts, as detailed in the Socio-Economic Impact Assessment which forms part of the Environmental Statement.

7.6 In summary, in identifying the Bus Station site as an appropriate location for a substantial, retail-led development, the Council took account of all the considerations outlined in Policy EC5 of PPS4.

Economic Development Considerations

7.7 Policy EC10.1 of PPS4 encourages LPAs to give favourable consideration to planning applications that secure sustainable economic growth. As this Retail Statement and other supporting material explain, the proposed development will deliver sustainable economic growth within a defined Sub-Regional Centre, together with a range of economic benefits for the Borough as a whole.

7.8 The development has also been carefully designed to ensure that it will limit carbon dioxide emissions, through measures such as maximising accessibility by non-car modes and by optimising the use of passive energy, sustainably sourced materials and low carbon technologies. The development is located in the town centre and will be served by a new bus station, thereby maximising accessibility for local residents.

7.9 The scheme will transform the south western part of the town centre by rejuvenating a poorly maintained area of land with deteriorating public realm and delivering a high-quality, landmark development at a gateway site. It will also deliver a range of economic and employment benefits.

7.10 We therefore conclude that the proposed development satisfies the requirements of Policy EC10 of PPS4.

Sequential Approach to Site Selection

7.11 We have carefully considered the potential offered by five alternative sites, located both within and on the edge of Hinckley Town Centre. However, we have demonstrated that none of these alternative sites are available and suitable and viable for a retail-led mixed-use development of the type currently proposed.

7.12 We have also shown that it would be inappropriate to disaggregate the proposed mixed-use scheme and accommodate the separate elements on several smaller sites. Not only would such an option be unviable for the developer, but it would diffuse the critical mass of the scheme, which is important to achieve if the scheme is to successfully change local shopping patterns and claw-back expenditure that currently leaks to destinations beyond the Borough.

7.13 The application site is therefore the most sequentially preferable opportunity to accommodate the proposed scheme. Development of a new commercial anchor on this site will strengthen the retail circuit within the town centre, and encourage pedestrians to travel between the application site and Castle Street, increasing footfall in currently secondary areas such as Regent Street and Station Road. The application site will function well as an integral part of the town centre, complementing the existing offer and creating 'spin off' benefits for existing traders.

7.14 We therefore believe that the application proposal meets the requirements of Policy EC15 of PPS4.

Impact Considerations

7.15 The application scheme will deliver the redevelopment of the Bus Station site, thereby realising one of the Council's key aspirations and securing substantial investment in the town centre. Our updated capacity assessment has shown that there will still be sufficient expenditure capacity to support a redevelopment scheme at the Britannia Centre/Castle Street, in addition to the scheme at the Bus Station site. In our assessment, the application scheme will have both direct and indirect positive impacts on the town centre's investment prospects.

7.16 We consider that the proposed development will have a positive impact on the vitality and viability of Hinckley Town Centre, as it will improve consumer choice, address specific deficiencies in the existing offer, and improve the range and quality of the food, non-food and commercial leisure sectors.

7.17 The proposed scheme will not adversely affect the development prospects of any out-of-centre site that is either allocated for redevelopment or proposed for allocation. Conversely, the proposed scheme will ensure the successful delivery of a crucial town centre scheme, which is proposed for allocation in the HTCAAP and which is already identified in the adopted Core Strategy.

7.18 Our impact assessment shows that the proposed development will not have an unacceptable impact on the convenience or comparison stores in Hinckley Town Centre or any other centre, both when the proposed scheme is considered on its own, and when it is considered cumulatively with extant retail commitments. The main convenience impact will be on the existing out-of-centre food superstores and much of the comparison trade draw will be from neighbouring, large competitor centres, such as Leicester, Nuneaton and Coventry, and the out-of-centre retail provision at Fosse Park.

7.19 Although there will be some trade draw from existing retailers in Hinckley Town Centre, on balance we consider that the scheme will have a largely positive impact on Hinckley. The scheme will: address current deficiencies in the town centre's retail, service and evening economy/leisure offer, thereby boosting the centre's vitality and viability; increase footfall; create an attractive southern gateway to the town centre; and it will provide a new bus station and new public car parking facilities. We fully expect that the scheme will function as an integral part of the town centre, with 'spin off' benefits for other town centre traders which will help to outweigh any adverse impacts of trade diversion.

7.20 The application scheme is clearly of an appropriate scale for Hinckley Town Centre. The proposed development has been designed specifically to address identified deficiencies in the existing retail and commercial leisure offer, and is of a scale that is consistent with the needs that have been identified. The scheme will improve the vitality and viability of the existing town centre, but will not fundamentally alter the role and function of the centre.

7.21 Overall, the proposed scheme is consistent with the Council's strategy to improve the vitality and viability of Hinckley Town Centre, it will address current deficiencies in the retail and leisure offer, and it will help to claw-back local expenditure that currently leaks to destinations further afield.

7.22 Accordingly, we conclude that the proposed scheme satisfies the six impact criteria that are set out in Policy EC16.1 of PPS4.

Overall Conclusion

7.23 The proposed development at the Bus Station site in Hinckley Town Centre will deliver a high-quality mix of retail, leisure and complementary uses, consistent with the vision for the site that is set out in the adopted Core Strategy and in the emerging HTCAAP. The scheme will improve the economic performance of a key town centre, which is entirely consistent with the objectives of a raft of national, regional and local policy documents.

7.24 Our assessment has demonstrated that the proposed development satisfies the requirements of Policies EC4 ('planning for consumer choice and promoting competitive town centres'), EC10 ('economic development'), EC15 ('sequential assessment') and EC16 ('impact assessment') of PPS4. Accordingly, because the proposed development accords with the adopted development plan and will not result in any significant adverse impacts, we conclude that there are no retail policy grounds on which to resist the application.

The Tin Hat Regeneration Partnership LLP
PROPOSED REDEVELOPMENT OF THE BUS STATION/ BRUNEL ROAD SITE, HINCKLEY
RETAIL STATEMENT – APPENDICES

ROGER TYM & PARTNERS
Planners and Development Economists

September 2010

formatted for double-sided printing

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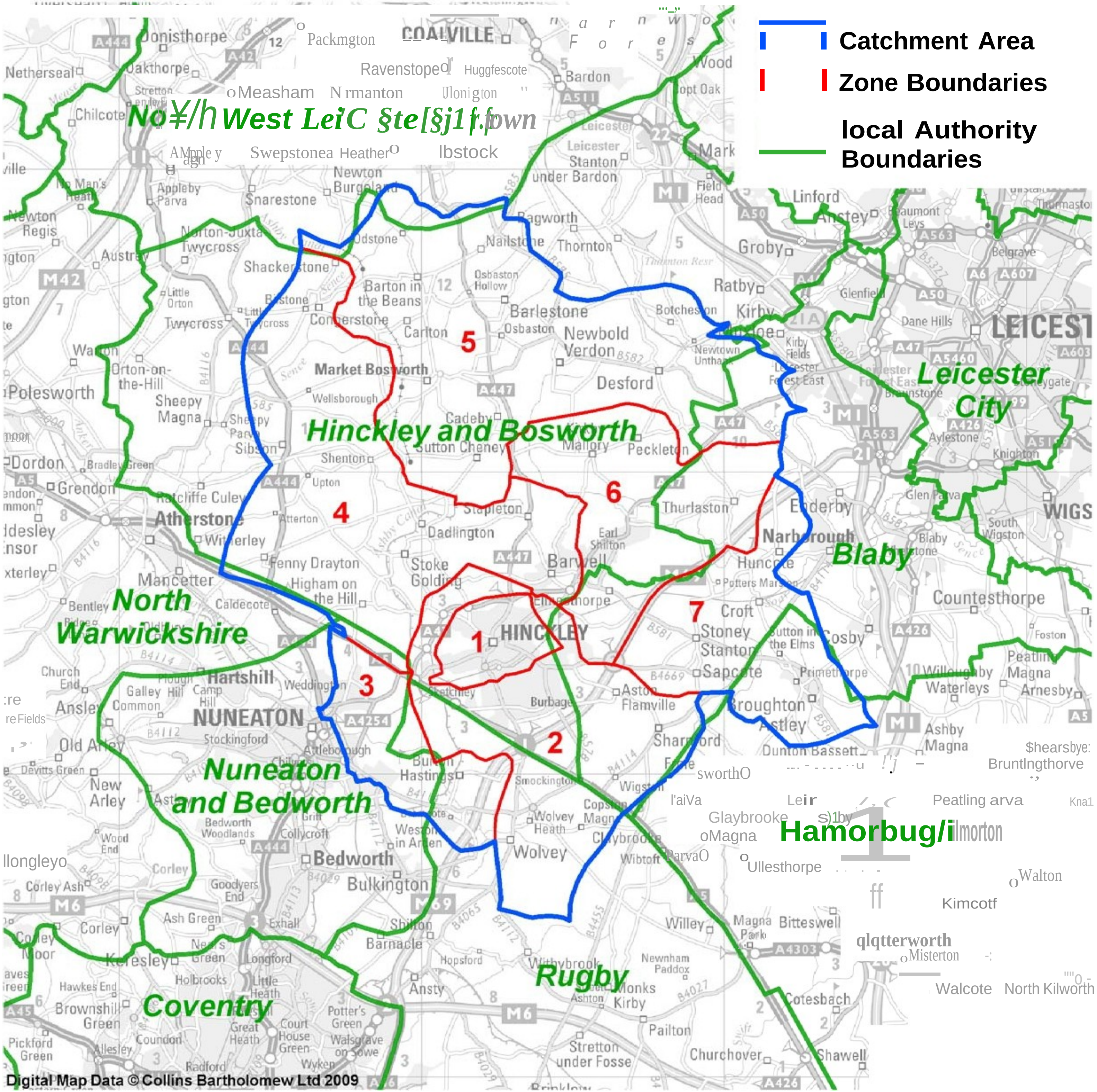
APPENDIX 1

OCA Plan


Catchment Area
Zone Boundaries
local Authority Boundaries
Hinckley and Bosworth
North Warwickshire
Nuneaton and Bedworth
Leicester City
Blaby
Rugby
Coventry
1
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3
4
5
6
7
HINCKLEY
NUNEATON
COALVILLE
Digital Map Data © Collins Bartholomew Ltd 2009

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APPENDIX 2

Schedules of Floorspace

Schedule 1	Existing Uses on the Application Site (as at 1st February 2010)
Schedule 2	Benchmark Turnover of the Existing Retail Units on the Application Site
Schedule 3a	Proposed Floorspace (at 26 May 2010, in sq.ft)
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Schedule 1 - Existing Uses on the Application Site (as at 1st February 2010)

Occupier	Address	Use	Gross Floorspace (sq.m)	Retail Sales Floorspace (sq.m)		Notes
				Food	Non-Food	
Modelspot	1-3 Waterloo Road	A1 Retail	140	-	98	Gross floorspace measured from GOAD
4 x vacant units	4 - 7 Waterloo Road	Vacant	170	-	-	Gross floorspace measured from GOAD
Venue nightclub	18 Rugby Road	Sui Generis	560	-	-	Gross floorspace measured from GOAD
Sawasdee Thai Restaurant	20 Rugby Road	A3	200	-	-	Gross floorspace measured from GOAD
James Bennett Ltd	Factory, Between Brunel Road and Rugby Road	B1/B2	2,530	-	-	Hosiery Manufacturer. Gross floorspace estimated from Promap.
Ballonatics	Factory, Between Brunel Road and Rugby Road	A1 Retail	330	-	231	Party shop. Gross floorspace estimated from Promap.
Hinckley Drycleaners	32 Rugby Road	A1 Retail	100	-	60	Gross floorspace measured from Promap
Thirteen Amp (vacant)	South of Brunel Road	B1/B2/B8	860	-	-	Clothing wholesaler. Gross floorspace measured from Promap
13 x garages	South of Brunel Road car pk	Sui Generis	200	-	-	Gross floorspace measured from Promap
Sainsbury's supermarket	North of Brunel Road	A1 Retail	1,932	710	125	Gross and sales floorspace from IGD. Estimate: 15% non-food, 85% food. 7 checkouts
Iceland supermarket	Unit 2, Brunel Road	A1 Retail	734	427	-	Gross and sales floorspace from IGD. Estimate: 100% food. 4 checkouts
Vacant factory	South of Brunel Road	Vacant	195	-	-	Gross floorspace measured from Promap
St John's Ambulance	South of Brunel Road	D1	475	-	-	Gross floorspace measured from Promap
AMG Midlands Car Repairs	South of Brunel Road	B2	340	-	-	Gross floorspace measured from Promap
Hinckley Times	South of Brunel Road	B1	480	-	-	Newspaper office. Gross floorspace measured from Promap
Air Training Corps and Army Cadet Force	South of Brunel Road	D1	480	-	-	Gross floorspace measured from Promap
NTR Tyres	South of Brunel Road	Sui Generis	170	-	-	Gross floorspace measured from Promap
Thirteen Amp (appears vacant)	North of Brunel Road	B1/B2/B8	715	-	-	Appears vacant. Gross floorspace measured from Promap
Volvo Dealership	30 Station Road	Sui Generis	805	-	-	Gross floorspace measured from Promap
Flat Pack Furniture Warehouse	26 Station Road	A1 Retail	1110	-	775	Gross floorspace measured from Promap. Store likely to have low turnover (sells bric-a-brac)
Wow Effect	24 Station Road	B1	260	-	-	Marketing company. Gross floorspace measured from Promap
Kim's Crafts (vacant)	24 Station Road		280	-	-	Gross floorspace measured from Promap
Quality Beauty Treatments	3 Lancaster Road	Sui Generis	17	-	-	Gross floorspace measured from Promap
Autography and Appleton House Accountancy	Appleton House, 22a Station Road	Sui Generis	160	-	-	Photography studio and accountancy practice. Gross floorspace measured from Promap
Sea-Band Ltd	5 Lancaster Road	B1/B2/B8	390	-	-	Factory/office/wholesalers. Gross floorspace measured from Promap
Hinckley Squash and Rackets Club	Off Brunel Road / Waterloo Road	D2	265	-	-	Gross floorspace measured from Promap
TOTAL			13898	1137	1289	

Schedule 2 - Benchmark Turnover of the Existing Retail Units on the Application Site (in £m)

Occupier	Address	Use	Gross Floorspace (sq.m)	Retail Sales Floorspace (sq.m)		Sales Density 2010		Turnover 2010 (Benchmark)	
				Food	Non-Food	Food	Non-Food	Food	Non-Food
Modelspot	1-3 Waterloo Road	A1 Retail	140	-	98	-	2000	-	0.2
Ballonatics	Factory, Between Brunel Road and Rugby Road	A1 Retail	330	-	231	-	2000	-	0.5
Hinckley Drycleaners	32 Rugby Road	A1	100	-	-	-	-	-	-
Sainsbury's supermarket	North of Brunel Road	A1 Retail	1,932	710	125	10,188	6,824	7.2	0.9
Iceland supermarket	Unit 2, Brunel Road	A1 Retail	734	427	-	5,717	-	2.4	-
Flat Pack Furniture Warehouse	26 Station Road	A1 Retail	1110	-	775	-	1000	-	0.8
TOTAL			4346	1137	1229			9.7	2.3

Schedule 3a - Proposed Floorspace (at 26 May 2010, in sq.ft)

UNIT	UNIT USE	IN SQ.FT									
		UNDERCROFT LEVEL	GROUND FLOOR	FIRST FLOOR	SECOND FLOOR	MEZZ LEVEL	TOTAL AREA (GEA)	TOTAL AREA (GIA)	TOTAL RETAIL SALES FLOORSPACE	FOOD SALES FLOORSPACE	NON-FOOD SALES FLOORSPACE
BLOCK A											
A1	A1	6,318	101,148				107,466	104,140	67,691	45,353	22,338
A2	A1		6,555			3,278	9,833	9,341	6,539		6,539
A3	A1		6,370			3,185	9,555	9,077	6,354		6,354
A4	A1		7,675			3,838	11,513	10,937	7,656		7,656
A5	A1		7,675			3,838	11,513	10,937	7,656		7,656
A6	A1		7,675			3,738	11,413	10,842	7,590		7,590
A7	A1		10,600			5,300	15,900	15,105	10,574		10,574
A8	D2		1,290	16,000			17,290	16,426			
A9	A1		4,700			2,350	7,050	6,698	4,688		4,688
A10	A1		4,100			2,050	6,150	5,843	4,090		4,090
A11	A1		3,475			1,738	5,213	4,952	3,467		3,467
BLOCK B											
B1	A3		3,475				3,475	3,301			
B2	A3		3,520				3,520	3,344			
B3	A3		3,830				3,830	3,639			
B4	A3		2,725				2,725	2,589			
B5	A3		2,925				2,925	2,779			
BLOCK C											
C1	A1		5,160				5,160	4,902	3,431		3,431
C2	A1		2,905				2,905	2,760	1,932		1,932
C3	A1		2,775				2,775	2,636	1,845		1,845
C4	A1		2,645				2,645	2,513	1,759		1,759
C5	A1		2,410				2,410	2,290	1,603		1,603
C6	A1		3,970				3,970	3,772	2,640		2,640
C7	A1		740				740	703	492		492
C8	A1		645				645	613	429		429
C9	A1		1,235				1,235	1,173	821		821
C10	D2		2,920	20,795			23,715	22,529			
BLOCK D											
D1	A2/B1		4,000	4,000			8,000	7,600			

NOTE: The figures in red text (relating to retail sales floorspace) are provided for illustration only, and should be regarded as indicative estimates at this outline stage of the application process.

Summary Floorspace Totals (in sq.ft)

TOTAL	A1	218,091	209,234
TOTAL	A2/B1	8,000	7,600
TOTAL	A3	16,475	15,651
TOTAL	D2	41,005	38,955
OVERALL TOTAL		283,571	271,440

Schedule 3b - Proposed Floorspace (at 26 May 2010, in sq.m)

UNIT	UNIT USE	IN SQ.M									
		UNDERCROFT LEVEL	GROUND FLOOR	FIRST FLOOR	SECOND FLOOR	MEZZ LEVEL	TOTAL AREA (GEA)	TOTAL AREA (GIA)	TOTAL RETAIL SALES FLOORSPACE	FOOD SALES FLOORSPACE	NON-FOOD SALES FLOORSPACE
BLOCK A											
A1	A1	587	9,397				9,984	9,675	6,289	4,213	2,075
A2	A1		609			305	914	868	607		607
A3	A1		592			296	888	843	590		590
A4	A1		713			357	1,070	1,016	711		711
A5	A1		713			357	1,070	1,016	711		711
A6	A1		713			347	1,060	1,007	705		705
A7	A1		985			492	1,477	1,403	982		982
A8	D2		120	1,486			1,606	1,526			
A9	A1		437			218	655	622	436		436
A10	A1		381			190	571	543	380		380
A11	A1		323			161	484	460	322		322
BLOCK B											
B1	A3		323				323	307			
B2	A3		327				327	311			
B3	A3		356				356	338			
B4	A3		253				253	241			
B5	A3		272				272	258			
BLOCK C											
C1	A1		479				479	455	319		319
C2	A1		270				270	256	179		179
C3	A1		258				258	245	171		171
C4	A1		246				246	233	163		163
C5	A1		224				224	213	149		149
C6	A1		369				369	350	245		245
C7	A1		69				69	65	46		46
C8	A1		60				60	57	40		40
C9	A1		115				115	109	76		76
C10	D2		271	1,932			2,203	2,093			
BLOCK D											
D1	A2/B1		372	372			743	706			

NOTE: The figures in red text (relating to retail sales floorspace) are provided for illustration only, and should be regarded as indicative estimates at this outline stage of the application process.

Summary Floorspace Totals (in sq.m)

TOTAL	A1	20,261	19,438
TOTAL	A2/B1	743	706
TOTAL	A3	1,531	1,454
TOTAL	D2	3,809	3,619
OVERALL TOTAL		26,345	25,218

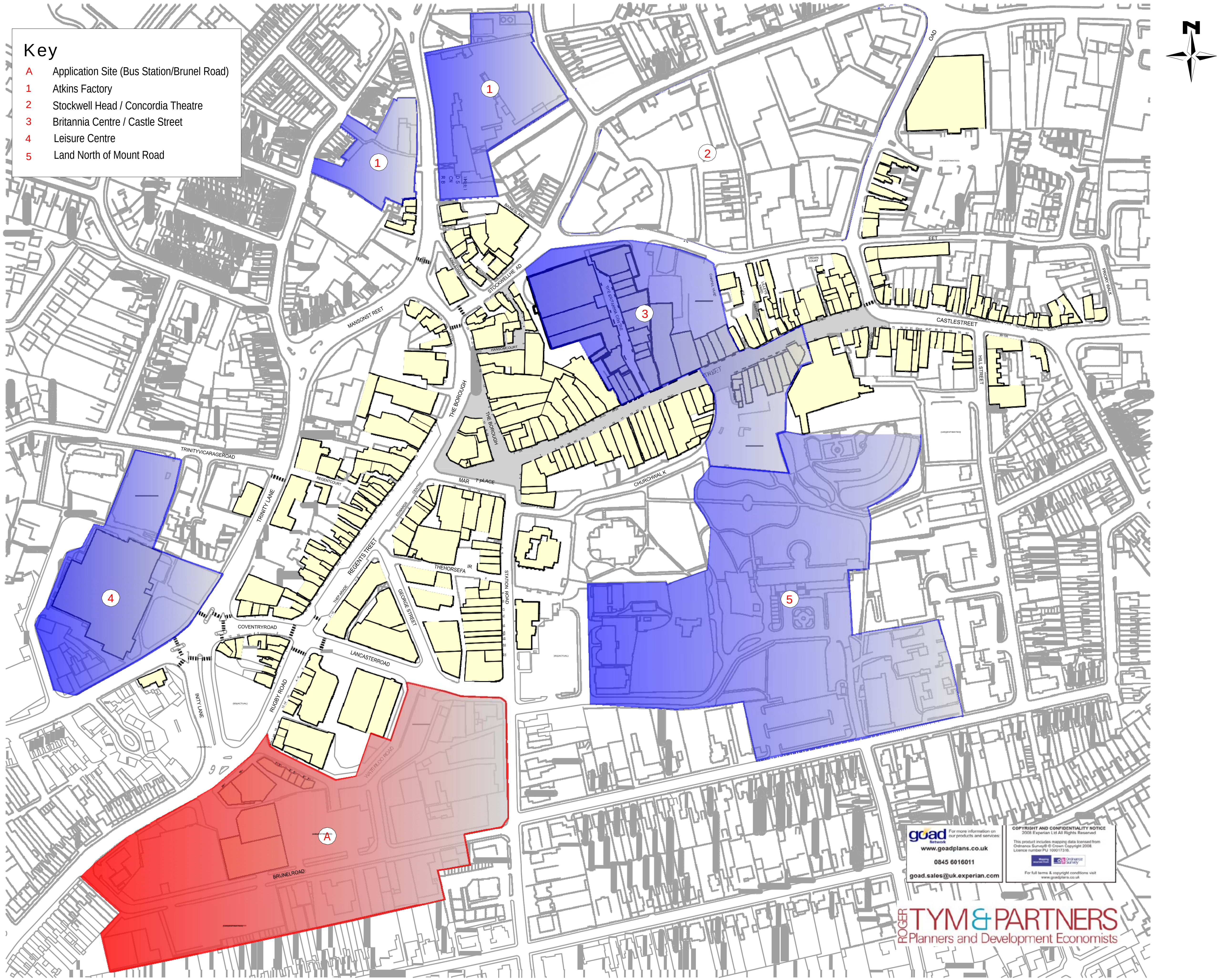
Schedule 4 - Estimated Turnover of the Proposed Retail Units (in £m)

UNIT	UNIT USE	Potential Occupier	Sales Density 2010		Sales Area		Turnover at 2010		Turnover at 2015	
			Food	Non-Food	Proportion at ground level	Proportion as mezzanine	Food	Non-Food	Food	Non-Food
BLOCK A										
A1	A1	Major Foodstore	12,426	8,258	100%	0%	52.4	17.1	53.6	18.2
A2	A1	Variety		4250	67%	33%		2.2		2.3
A3	A1	Variety		4250	67%	33%		2.1		2.2
A4	A1	Clothing		2500	67%	33%		1.5		1.6
A5	A1	Health & Beauty		7300	67%	33%		4.3		4.6
A6	A1	Footwear		3300	67%	33%		1.9		2.1
A7	A1	Clothing		3750	67%	33%		3.1		3.3
A9	A1	Health & Beauty		4250	67%	33%		1.5		1.6
A10	A1	Electronics		4000	67%	33%		1.3		1.3
A11	A1	Sports		3250	67%	33%		0.9		0.9
BLOCK C										
C1	A1	Household		2500	100%	0%		0.8		0.8
C2	A1	Cards		2500	100%	0%		0.4		0.5
C3	A1	Unknown		3500	100%	0%		0.6		0.6
C4	A1	Hobby		6500	100%	0%		1.1		1.1
C5	A1	Clothing		3500	100%	0%		0.5		0.6
C6	A1	Unknown		4000	100%	0%		1.0		1.0
C7	A1	Unknown		1500	100%	0%		0.1		0.1
C8	A1	Unknown		1500	100%	0%		0.1		0.1
C9	A1	Unknown		1500	100%	0%		0.1		0.1
TOTAL							52.4	40.5	53.6	43.0

APPENDIX 3

Sequential Sites

HINCKLEY - LOCATION OF SITES CONSIDERED IN THE SEQUENTIAL ASSESSMENT



Site 1: Atkins Factory Strategic Development Area, Lower Bond Street

Area: 1.22 ha

Local Plan Allocation: The site is allocated under Policy EMP1 as an area of land to be retained for employment purposes. Policy EMP1 has been 'saved' as part of the Development Plan.

Proposed Allocation in HTCAAP: Policy 3 outlines the key requirements for the site's redevelopment, as follows: provision of at least 5 residential units; redevelopment of the factory building for use by North Warwickshire and Hinckley College; and reuse of the Grade II Atkins Factory Building for mixed-uses, including a creative enterprise centre.

PPS6 Sequential Test Status: Edge-of-Centre

Description of Site & Current Uses: The site is located to the north of the existing town centre, and is primarily situated outside the Town Centre Boundary. The site comprises two parcels of land, located on either side of Lower Bond Street. The parcel on the east side of the road previously contained a factory, which has now been cleared, although a Grade II listed building remains on site. The parcel on the west side of the road consists of Hinckley and District Museum (also a Grade II listed building, dating from the 17th Century), and an area of vacant land.

Physical Constraints: Borders a conservation area, and contains two Grade II listed buildings.

Vehicular/Pedestrian Access: The site is not located within a retail area, as designated on the Proposals Map. However, the site is within walking distance of the secondary shopping area around The Borough. The site can also be accessed by car from Lower Bond Street, and there is a bus stop directly outside the site (on either side of Lower Bond Street).

Availability: The site is not available for redevelopment. The eastern part of the site has been granted planning permission for a college building and a creative industries centre, which are now under-construction on site. The western part of the site is primarily occupied by the Hinckley and District Museum, which is still in active use. Only a small proportion of the site is vacant and available for development (0.2 ha).

Suitability: The site comprises two irregular-shaped plots of land, which are bisected by Lower Bond Street. The site is not suitable for intensive retail development, and is more suited to uses that are sympathetic to the setting of the existing Grade II listed buildings. The site is also allocated for employment uses by saved Local Plan Policy EMP1.

Viability: The site is located in a peripheral location, outside the Town Centre boundary, and to the north of some low-grade retail uses, where footfall is very limited. Nevertheless, the site may be viable for some form of commercial development.

Summary: Although the majority of the site has been cleared, the land has permission for educational uses, which are currently under-construction on site. The remaining land is not suitable for intensive commercial development, as it is too small in size; situated in a peripheral location; and constrained by its setting adjacent to a Grade II listed building.

Site 2: Stockwell Head / Concordia Theatre Strategic Development Area

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Area: 3.1 ha

Local Plan Allocation: The site is designated under Policy Retail 5 as a 'Town Centre Fringe' area. Part of the site is also allocated under saved Policy EMP1 as an area of land to be retained for employment purposes.

Proposed Allocation in HTCAAP: Policy 2 outlines the key requirements for the site's redevelopment, as follows: provision of at least 40 residential units; provision of a consolidated car park; infill development and provision of an active retail frontage along Stockwell Head; improved facilities at Concordia Theatre; and enhanced public realm.

PPS6 Sequential Test Status: Edge-of-Centre

Description of Site & Current Uses: The site is located to the north of the existing town centre, and to the rear of the Primary Shopping Frontage along Castle Street. The area is characterised by a mix of uses, a poor public realm and has a low-grade appearance. The uses on site include the Concordia Theatre, a Working Men's Club, Baptist Chapel, a residential terrace, offices, industrial premises, car park and retail outlets.

Physical Constraints: Some buildings must be retained; such as the Concordia Theatre.

Vehicular/Pedestrian Access: The site is within walking distance of the Primary Shopping Frontage along Castle Street, although there is no direct pedestrian access route at present, and linkages are only via alleyways between shops. The site can be accessed by car from Stockwell Head, and there are bus stops to the north of the site (along Council Road and Hollier's Walk).

Availability: The site is currently in a mix of active uses, and the majority of the site is not therefore available for redevelopment. There are complex land ownership and tenancy issues on site, which will restrict comprehensive redevelopment. There may, however, be opportunities for some small-scale infill development on individual plots.

Suitability: Although the site comprises a large area of land, there are few available development opportunities on site. There are no access roads within the site, and there are various topographical issues which would have to be overcome to support redevelopment. The site is located in a fringe area, to the rear of the existing Primary Shopping Frontage, and is unlikely to function as a natural extension of the town centre.

Viability: The site is located in a backland location, and offers limited main road frontage. Footfall is also very low in this area, and the site is not likely, therefore, to be attractive to mainstream retail and service operators.

Summary: The site is in multiple-ownership and currently supports a range of uses, and it is unlikely, therefore, to be available for comprehensive redevelopment. The site's backland location also makes it unsuitable for a large-scale commercial scheme, although it would benefit from some small-scale infill development to improve the Stockwell Head frontage and enhance the public realm.

Site 3: Britannia Centre / Castle Street Strategic Development Area

Area: 1.9 ha

Local Plan Allocation: The site contains a mix of Primary and Secondary Retail Frontage. The majority of the site is designated under saved Policy Retail 4 as an ‘Other Shopping Area’.

Proposed Allocation in HTCAAP: Policy 4 outlines the key requirements for the site, as follows: provision of at least 6,500 sq.m of comparison retail floorspace; a new pedestrian street between Stockwell Head and Castle Street; and mixed-use development along Church Walk.

PPS6 Sequential Test Status: In Centre

Description of Site & Current Uses: The site comprises the existing Britannia Shopping Centre, and several retail units along Castle Street. There is scope to enhance the Britannia Centre, which currently provides no linkages to Stockwell Head, and is in need of some environmental improvement and modernisation.

Physical Constraints: The site is relatively constrained by the existing built form. Although there is a car park to the rear of the Britannia Centre, this provides an important facility for visitors to the centre, and is adjacent to the service access to the Centre. There is, therefore, limited scope to materially expand the Britannia Centre, beyond the current building footprint.

Vehicular/Pedestrian Access: The site is located along the Primary Shopping Frontage of Castle Street, which is pedestrianised. A car park is provided to the rear of the Britannia Centre, and at Church Walk. The nearest bus stops are along Regent Street and Castle Street.

Availability: The Britannia Centre is in single ownership, although we are not aware that the owner has any intentions to extend or enhance the Centre in the short-term. A more comprehensive scheme, involving provision of a new pedestrian street between Stockwell Head and Castle Street, is likely to involve acquisition of some properties along Castle Street.

Suitability: The site’s location along the Primary Shopping Frontage, and its existing use as a shopping centre, makes it highly suitable for further retail use. The site is particularly suitable for accommodating ‘high street’ comparison retailers, and potentially a department store (which is absent from the current retail offer). However, given the constraints of the existing built form, we do not consider there is physical capacity to provide a large format foodstore at the site, or to provide adequate vehicular or service access for such a use.

Viability: The site is in a prime retail location, along the Primary Shopping Frontage, and further retail development in this area is likely to be viable.

Summary: The Britannia Centre is well-located in the heart of the town centre, and has potential for some cosmetic enhancement and the provision of additional ‘high street’ floorspace. However, we are not aware of any intentions - from the owner of the site - to deliver such a scheme in the short-term. Furthermore, given the size of the site, and the constraints of surrounding uses, the site will not be able to accommodate development of the scale proposed at the Bus Station site, and it is an unsuitable location for a large format foodstore.

Site 4: The Leisure Centre

Area: 1.3 ha

Local Plan Allocation: Various parts of the site are designated under saved Policy Retail 4 as 'Other Shopping Area', saved Policy Retail 5 as 'Town Centre Fringe', and saved Policy T4 as an existing car park to be retained.

Proposed Allocation in HTCAAP: Policy 6 outlines the key requirements for the site, as follows: creation of a landmark development; provision of at least 44 residential units; and provision of landscaping along Coventry Road.

PPS6 Sequential Test Status: Edge-of-Centre

Description of Site & Current Uses: The site comprises the existing Borough Leisure Centre and its car park. The leisure centre is in need of significant enhancement. A feasibility study, completed by MACE in May 2007, found that improvements can best be delivered by relocating the leisure centre and an alternative site has been identified. The southern part of the site also accommodates a residential dwelling, a funeral directors, a car wash and a garage.

Physical Constraints: There is little scope to extend beyond the boundaries of the site, which is bordered by residential development at Trinity Court, a church, Marchant Road and Trinity Lane.

Vehicular/Pedestrian Access: The site can be accessed by car from Trinity Vicarage Road, and already benefits from a car park. The site can also be accessed on foot from the secondary shopping area along Regent Street. The nearest bus stops are at the bus station, on the application site.

Availability: The Council intends to relocate the existing leisure centre, and an alternative site for this use has been identified. The site is therefore likely to be available for redevelopment in the foreseeable future.

Suitability: The site is located in a rather peripheral location; to the rear of the secondary shopping frontage along Regent Street, and separated from the town centre by the busy junction at Trinity Lane. The site is relatively small in size and of poor configuration to support major retail development. In any case, we consider that this site is not sequentially preferable to the application site, and offers poor pedestrian linkages with the primary shopping area.

Viability: The site is located towards the fringe of the town centre, in an area where footfall is low. The site is not likely, therefore, to be attractive to mainstream retail and service operators.

Summary: The existing leisure centre is to be relocated, creating a potential development opportunity within the town centre boundary. However, we consider that the site is too small and poorly-configured to accommodate a retail-led, mixed-use scheme, of the scale proposed at the Bus Station site. In any case, a scheme in this tertiary location is unlikely to attract operator interest, and we note that the site offers less opportunity to form links with the primary shopping area than the application proposal itself. We consider that this site is more appropriate for residential development, as suggested in the emerging HTCAAP.

Site 5: Land North of Mount Road

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Area: 4.5 ha

Local Plan Allocation: Part of the site is designated under saved Policy Retail 5 as ‘Town Centre Fringe’, whilst other parts of the site are protected for recreational use (saved Policy REC1), and the provision of health care (saved Policy CF3).

Proposed Allocation in HTCAAP: Policy 5 outlines the key requirements for the site, as follows: provision of at least 22 residential units; retention and enhancement of Argents Mead and the memorial gardens; retention of an element of employment uses and existing levels of car parking.

PPS6 Sequential Test Status: Edge-of-Centre

Description of Site & Current Uses: The site comprises the existing Borough Council offices; the Castle Mound; Memorial Gardens; Florence House; the Vicarage, a health centre, and the Hinckley and District Hospital. A large proportion of the site is a park, providing local amenity and recreational space.

Physical Constraints: A significant proportion of the site comprises open space, which is protected by its designation in saved policies of the Local Plan. The site also contains a scheduled ancient monument (Hinckley Castle) and a listed building (the War Memorial).

Vehicular/Pedestrian Access: The site can be accessed on foot from the Primary Shopping Frontage, via Church Walk. The site can also be accessed by car from Mount Road, and there is a small car park on site. The nearest bus stops are along Station Road and Castle Street.

Availability: There are a number of active uses on site, which are likely to remain for the foreseeable future, such as the District Hospital. The Borough Council is relocating, however, and the existing offices on site may be available for redevelopment or reoccupation.

Suitability: Despite the site’s location to the rear of the Primary Shopping Frontage, it is unsuitable for retail or mixed-use redevelopment. The majority of the site provides valuable amenity space in the town centre, which should be retained. Only the site of the existing Council offices provides a potential redevelopment opportunity, but these are located in the centre of the park, in an area with no main road frontage. Moreover, the site is more suited to uses that are sympathetic to the setting of the Castle and the War Memorial.

Viability: The site offers limited main road frontage and is unlikely to be attractive to mainstream retail and commercial leisure operators.

Summary: This relatively large site is currently in a mix of active uses, many of are likely to be retained on the site for the foreseeable future. Other parts of the site provide protected open space, which again offers limited development potential. Although the Council is relocating, the existing offices are not suitable for retail redevelopment. Overall, the site may offer some small-scale development opportunities, particularly around its boundary, but any development should be for uses that are sympathetic to the historic and open setting of park (such as residential development, as suggested in the emerging HTCAAP).

APPENDIX 4

Retail Capacity

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Spreadsheet 14c	Summary of Capacity for Convenience Goods: Scenario C (Increased Retention Rate: from 70.4% in 2010 to 80.0% by 2026 with an Allowance for Over-trading)

Spreadsheet 1 - Definition of Zones

Zone	Postcode	Local Authority
Zone 1	LE10 0	Hinckley and Bosworth
	LE10 1	Hinckley and Bosworth
Zone 2	LE10 2	Hinckley and Bosworth
	LE10 3	Rugby / Hinckley and Bosworth / Blaby
Zone 3	CV11 6	Nuneaton and Bedworth / Rugby
Zone 4	LE9 8	Hinckley and Bosworth
	CV13 6	Hinckley and Bosworth
Zone 5	LE9 9	Hinckley and Bosworth / Blaby
	CV13 0	Hinckley and Bosworth
Zone 6	LE9 7	Hinckley and Bosworth / Blaby
Zone 7	LE9 3	Blaby
	LE9 4	Blaby / Harborough
	LE9 6	Harborough

Notes:

(1) The predominant local authority in each zone is highlighted inbold (ie.the local authority in which the majority of the populated area of the zone is located).

Spreadsheet 2 - Population Projections

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	All Zones Total
Population 2007	30,613	16,981	16,730	13,685	13,602	11,809	18,196	121,616
Population 2010	31,140	17,273	16,979	13,920	13,836	12,012	18,528	123,688
Population 2015	32,003	17,752	17,448	14,306	14,219	12,345	18,957	127,031
Population 2021	33,085	18,352	18,070	14,790	14,700	12,763	19,602	131,362
Population 2026	34,036	18,879	18,540	15,215	15,123	13,129	20,266	135,187
Change in population 2010 - 2015								
Numeric change	863	479	470	386	383	333	430	3,343
Percentage change	2.8%	2.8%	2.8%	2.8%	2.8%	2.8%	2.3%	2.7%
Change in population 2015 - 2021								
Numeric change	1,082	600	622	484	481	418	644	4,331
Percentage change	3.4%	3.4%	3.6%	3.4%	3.4%	3.4%	3.4%	3.4%
Change in population 2021 - 2026								
Numeric change	951	527	470	425	422	367	664	3,826
Percentage change	2.9%	2.9%	2.6%	2.9%	2.9%	2.9%	3.4%	2.9%
Change in population 2010 - 2026								
Numeric change	2,896	1,606	1,561	1,295	1,287	1,117	1,738	11,500
Percentage change	9.3%	9.3%	9.2%	9.3%	9.3%	9.3%	9.4%	9.3%

NOTES:
(1) Population data was sourced from MapInfo and Oxford Economics (mid-year 2007). The population in each zone was projected forward to the base year and forecast years using population multipliers derived from East Midlands Regional Assembly RSS 2009 growth projections (June 2009) for Hinckley and Bosworth and Blaby, and ONS 2006-based Sub-National Population Projections (published 12 June 2008) for Nuneaton and Bedworth.
(2) The population multiplier has been calculated for the predominant local authority in each zone (highlighted in bold in Spreadsheet 1) and has been applied to the total population within that zone.

Spreadsheet 3 - Comparison Goods Expenditure (per capita)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
	£	£	£	£	£	£	£
2007	3,264	3,406	2,956	3,256	3,350	3,167	3,546
2010	3,305	3,449	2,993	3,297	3,392	3,207	3,590
2015	3,850	4,018	3,487	3,841	3,952	3,736	4,183
2021	4,675	4,879	4,234	4,664	4,799	4,536	5,079
2026	5,368	5,601	4,861	5,355	5,509	5,208	5,831

NOTES:
(1) 2007-based per capita comparison expenditure data is sourced from MapInfo and Oxford Economics.
(2) The 2007 MapInfo and Oxford Economics comparison expenditure data is projected forward to the base year and forecast years using the midpoint of the forecasts provided by Pitney Bowes Business Insight, as summarised in its Information Brief 09/02 (Table 1 and Table 2, September 2009), and Experian in its Retail Planner Briefing Note 7.1 (Figure 1, August 2009). The forecasts that we have used are as shown in the following table:

Per Capita Comparison Expenditure Growth Forecasts (2007-2026)

Year	Annual Growth Rates		
	Experian	Oxford Economics	RTP Midpoint
2008	2.7%	4.63%	3.67%
2009	1.1%	-4.46%	-1.68%
2010	-0.4%	-0.93%	-0.66%
2011	1.1%	1.48%	1.29%
2012	2.5%	3.62%	3.06%
2013	2.5%	4.91%	3.70%
2014	2.5%	5.02%	3.76%
2015	2.5%	4.93%	3.71%
2016	2.5%	4.66%	3.58%
2017	2.8%	4.51%	3.65%
2018	2.8%	4.28%	3.54%
2019	2.8%	3.94%	3.37%
2020	2.8%		2.80%
2021	2.8%		2.80%
2022	2.8%		2.80%
2023	2.8%		2.80%
2024	2.8%		2.80%
2025	2.8%		2.80%
2026	2.8%		2.80%

Spreadsheet 4 - Total Comparison Goods Expenditure & Expenditure Growth

Year	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	All Zones Total £m
Total expenditure 2010	102.91	59.57	50.82	45.89	46.93	38.52	66.52	411.16
Spending on SFT in 2010 of average of 8.4%	7.79	5.28	3.41	2.82	5.75	4.29	5.10	34.45
Total expenditure excluding SFT 2010	95.12	54.29	47.41	43.07	41.18	34.22	61.42	376.71
Total expenditure 2015	123.22	71.32	60.84	54.95	56.19	46.12	79.30	491.93
Spending on SFT in 2015 of 9.6%	11.83	6.85	5.84	5.27	5.39	4.43	7.61	47.22
Total expenditure excluding SFT 2015	111.39	64.47	55.00	49.67	50.80	41.69	71.68	444.70
Total expenditure 2021	154.69	89.54	76.51	68.98	70.54	57.90	99.56	617.72
Spending on SFT in 2021 of 9.4%	14.54	8.42	7.19	6.48	6.63	5.44	9.36	58.07
Total expenditure excluding SFT 2021	140.15	81.12	69.32	62.50	63.91	52.45	90.21	559.65
Total expenditure 2026	182.69	105.75	90.13	81.47	83.31	68.38	118.18	729.90
Spending on SFT in 2026 of 9.1%	16.62	9.62	8.20	7.41	7.58	6.22	10.75	66.42
Total expenditure excluding SFT 2026	166.07	96.12	81.92	74.06	75.73	62.16	107.42	663.48
Growth in total expenditure 2010 - 2015	20.31	11.75	10.02	9.05	9.26	7.60	12.77	80.77
Growth in total expenditure 2015 - 2021	31.47	18.22	15.67	14.03	14.35	11.78	20.27	125.79
Growth in total expenditure 2021 - 2026	28.01	16.21	13.61	12.49	12.77	10.48	18.61	112.19
Growth in total expenditure 2010 - 2026	79.78	46.18	39.31	35.58	36.38	29.86	51.66	318.75
Growth in spending on SFT 2010 - 2015	4.04	1.57	2.43	2.45	-0.36	0.13	2.51	12.78
Growth in spending on SFT 2015 - 2021	2.71	1.57	1.35	1.21	1.24	1.01	1.75	10.84
Growth in spending on SFT 2021 - 2026	2.08	1.21	1.01	0.93	0.95	0.78	1.40	8.36
Growth in spending on SFT 2010 - 2026	8.84	4.34	4.79	4.59	1.83	1.93	5.65	31.97

NOTES:
(1) The figures in the above table are the product of multiplying the data presented in Spreadsheet 2 (population) by Spreadsheet 3 (per capita comparison goods expenditure), and are in millions of pounds (£m).
(2) The total expenditure includes a proportion of expenditure on Special Forms of Trading (SFT) (i.e. mail order, TV and Internet shopping and markets). We have assumed that the proportion of expenditure on SFT in 2010 remains at the levels identified in the 2007 telephone survey of households and varies between the different zones, ranging from 6.15% of expenditure in Zone 4 to 12.25% of expenditure in Zone 5. For each of the forecast years, we have assumed that the proportion of expenditure spent on SFT in each zone will be 9.6% in 2015, 9.4% in 2021 and 9.1% in 2026 (the levels estimated by Experian in Appendix 3 of Retail Planner Briefing Note 7.1, August 2009).

All monetary values are held constant at 2007 prices.

Spreadsheet 5 - Comparison Goods Spending Patterns in 2010 as a Percentage Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
	%	%	%	%	%	%	%
Inside Catchment Area							
Zone 1							
Hinckley Town Centre	44.06	40.86	2.37	33.76	14.87	27.29	17.08
Hinckley Retail Park, Sword Drive, LE10 0GL	1.31	0.87	0.09	2.06	1.10	2.22	0.64
Other Stores, Zone 1	1.16	1.13	0.00	0.55	1.58	2.04	0.76
Sub-Total Zone 1	46.54	42.86	2.46	36.37	17.54	31.55	18.47
Zone 2							
Burbage	0.95	2.32	0.00	0.25	0.18	0.59	0.41
Other Stores, Zone 2	0.00	0.00	0.05	0.00	0.00	0.00	0.00
Sub-Total Zone 2	0.95	2.32	0.05	0.25	0.18	0.59	0.41
Zone 3							
Other Stores, Zone 3	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sub-Total Zone 3	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Zone 4							
Other Stores, Zone 4	0.20	0.21	0.00	0.93	0.56	0.65	0.06
Sub-Total Zone 4	0.20	0.21	0.00	0.93	0.56	0.65	0.06
Zone 5							
Other Stores, Zone 5	0.00	0.09	0.08	0.00	1.76	0.14	0.00
Sub-Total Zone 5	0.00	0.09	0.08	0.00	1.76	0.14	0.00
Zone 6							
Earl Shilton	0.53	0.19	0.00	0.97	0.63	5.00	0.12
Other Stores, Zone 6	0.00	0.00	0.00	0.00	0.11	0.00	0.00
Sub-Total Zone 6	0.53	0.19	0.00	0.97	0.74	5.00	0.12
Zone 7							
Other Stores, Zone 7	0.00	0.07	0.00	0.26	0.00	0.71	1.17
Sub-Total Zone 7	0.00	0.07	0.00	0.26	0.00	0.71	1.17
TOTAL WITHIN CATCHMENT AREA	48.22	45.72	2.59	38.78	20.77	38.64	20.23
Outside Catchment Area							
Leicester City Centre	11.17	11.40	2.25	12.85	24.15	20.99	18.52
Fosse Park, Fosse Park Avenue, Leicester	10.75	12.73	3.94	11.63	19.32	12.71	35.54
Nuneaton Town Centre	8.88	7.37	48.36	13.48	3.01	3.38	1.22
Coventry City Centre	2.07	2.30	7.70	0.94	0.00	2.37	1.02
Coalville Town Centre	0.04	0.00	0.35	0.15	5.71	0.60	0.00
Birmingham City Centre	1.37	1.12	2.84	1.36	0.00	0.65	1.01
Rugby Town Centre	0.44	0.51	0.50	0.37	0.06	0.00	2.16
Focus, Weadington Road, Nuneaton, CV10 0AD	0.13	0.12	4.84	0.24	0.13	0.00	0.10
B&Q, Brandon Road, Binley Woods, CV3 2JD	0.36	1.26	2.19	0.26	0.33	0.00	0.77
Currys, Bond Street, Nuneaton, CV11 4FX	0.65	0.06	2.08	0.15	0.15	0.08	0.00
Other Stores, Outside Catchment	8.35	8.55	15.65	13.64	14.11	9.42	11.76
Internet / mail order / catalogue	7.57	8.86	6.71	6.15	12.25	11.15	7.67
TOTAL OUTSIDE CATCHMENT AREA	51.78	54.28	97.41	61.22	79.23	61.36	79.77
TOTAL	100.00	100.00	100.00	100.00	100.00	100.00	100.00

NOTES:
(1) A telephone survey of households was undertaken in 2007 assess patterns of spending on comparison goods as part of the Hinckley and Bosworth Borough Retail Capacity Study. As there have been no developments that are likely to materially impact on shopping patterns since the survey was undertaken, we have assumed that spending patterns in 2010 remain as identified from the 2007 household survey,

Spreadsheet 6 - Comparison Goods Spending Patterns in 2010 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total (1)	All Zones Market Share (2)
	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside Catchment Area									
Zone 1									
Hinckley Town Centre	45.35	24.34	1.20	15.49	6.98	10.51	11.36	115.23	28.0%
Hinckley Retail Park, Sword Drive, LE10 0GL	1.35	0.52	0.05	0.94	0.51	0.86	0.42	4.65	1.1%
Other Stores, Zone 1	1.20	0.67	0.00	0.25	0.74	0.79	0.50	4.15	1.0%
Sub-Total Zone 1	47.90	25.53	1.25	16.69	8.23	12.15	12.29	124.04	30.2%
Zone 2									
Burbage	0.98	1.38	0.00	0.11	0.09	0.23	0.27	3.05	0.7%
Other Stores, Zone 2	0.00	0.00	0.02	0.00	0.00	0.00	0.00	0.02	0.0%
Sub-Total Zone 2	0.98	1.38	0.02	0.11	0.09	0.23	0.27	3.08	0.7%
Zone 3									
Other Stores, Zone 3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Sub-Total Zone 3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Zone 4									
Other Stores, Zone 4	0.21	0.12	0.00	0.43	0.26	0.25	0.04	1.31	0.3%
Sub-Total Zone 4	0.21	0.12	0.00	0.43	0.26	0.25	0.04	1.31	0.3%
Zone 5									
Other Stores, Zone 5	0.00	0.05	0.04	0.00	0.82	0.06	0.00	0.97	0.2%
Sub-Total Zone 5	0.00	0.05	0.04	0.00	0.82	0.06	0.00	0.97	0.2%
Zone 6									
Earl Shilton	0.54	0.11	0.00	0.45	0.29	1.92	0.08	3.40	0.8%
Other Stores, Zone 6	0.00	0.00	0.00	0.00	0.05	0.00	0.00	0.05	0.0%
Sub-Total Zone 6	0.54	0.11	0.00	0.45	0.35	1.92	0.08	3.45	0.8%
Zone 7									
Other Stores, Zone 7	0.00	0.04	0.00	0.12	0.00	0.27	0.78	1.21	0.3%
Sub-Total Zone 7	0.00	0.04	0.00	0.12	0.00	0.27	0.78	1.21	0.3%
TOTAL WITHIN CATCHMENT AREA	49.62	27.24	1.32	17.80	9.75	14.88	13.45	134.06	32.6%
Outside Catchment Area									
Leicester City Centre	11.49	6.79	1.14	5.90	11.34	8.09	12.32	57.07	13.9%
Fosse Park, Fosse Park Avenue, Leicester	11.07	7.58	2.00	5.34	9.07	4.89	23.64	63.59	15.5%
Nuneaton Town Centre	9.14	4.39	24.57	6.19	1.41	1.30	0.81	47.82	11.6%
Coventry City Centre	2.13	1.37	3.91	0.43	0.00	0.91	0.68	9.43	2.3%
Coalville Town Centre	0.04	0.00	0.18	0.07	2.68	0.23	0.00	3.20	0.8%
Birmingham City Centre	1.41	0.67	1.44	0.62	0.00	0.25	0.67	5.06	1.2%
Rugby Town Centre	0.46	0.30	0.26	0.17	0.03	0.00	1.44	2.65	0.6%
Focus, Weadington Road, Nuneaton, CV10 0AD	0.14	0.07	2.46	0.11	0.06	0.00	0.07	2.90	0.7%
B&Q, Brandon Road, Binley Woods, CV3 2JD	0.37	0.75	1.11	0.12	0.16	0.00	0.51	3.02	0.7%
Currys, Bond Street, Nuneaton, CV11 4FX	0.67	0.04	1.06	0.07	0.07	0.03	0.00	1.93	0.5%
Other Stores, Outside Catchment	8.59	5.09	7.96	6.26	6.62	3.63	7.82	45.97	11.2%
Internet / mail order / catalogue	7.79	5.28	3.41	2.82	5.75	4.29	5.10	34.45	8.4%
TOTAL OUTSIDE CATCHMENT AREA	53.29	32.33	49.50	28.10	37.18	23.63	53.07	277.10	67.4%
TOTAL	102.91	59.57	50.82	45.89	46.93	38.52	66.52	411.16	100.0%

NOTES:
(1) The spending patterns are calculated by multiplying the total comparison goods expenditure in 2010 (Spreadsheet 4) by the market share at 2010 (Spreadsheet 5). The figures in the 'Total' column are the sum of the expenditure attracted to each centre/store from each zone.
(2) The 'All zones market share' is calculated through dividing the total expenditure attracted by each centre by the total expenditure in the study area.

All monetary values are held constant at 2007 prices.

Spreadsheet 7a - Summary of Capacity for Comparison Goods: Scenario A (Static Retention Rate: 32.6%)

	2010	2015	2021	2026	2010-15 Change	2015-21 Change	2021-2026 Change	2010-21 Change	2010-26 Change
Study area expenditure retention [1]									
A. Total study area expenditure (£m)	411.2	491.9	617.7	729.9	80.8	125.8	112.2	206.6	318.7
B. Current retention level of centres within the study area (%)	32.6%	32.6%	32.6%	32.6%					
C.Retainedexpenditure(£m)(=A*B)	134.1	160.4	201.4	238.0	26.3	41.0	36.6	67.4	103.9
Turnover of stores [2]									
D. Stores' turnover derived from study area (£m)	134.1	142.1	153.1	161.4					
E.Improvementinsalesdensitiesofcentres(£m)					8.1	11.0	8.3	19.1	27.4
Special Forms of Trading [3]									
F. GrowthinSpendingonSFT(£m)		12.8	23.6	32.0	12.8	10.8	8.4	23.6	32.0
Commitments [4]									
Mixed use development, Jarvis Porter Site, Hinckley		14.1	15.2	16.0					
Redevelopment four retail units, Castle Street, Hinckley		0.9	1.0	1.0					
G.Turnoverfromcommitments(£m)	0.0	15.0	16.2	17.1	15.0	1.1	0.9	16.2	17.1
H. Residual expenditure (£m) [5]	0.0	-9.6	8.5	27.5	-9.6	18.0	19.0	8.5	27.5
Comparison assessment [6]									
Assumed sales density (£/sq.m)	4,500	4,771	5,140	5,419					
I. Floorspace requirement (net sq.m)	0	-2,002	1,653	5,082	-2,002	3,655	3,429	1,653	5,082
J. Floorspace requirement (gross sq.m)	0	-2,860	2,362	7,260	-2,860	5,221	4,898	2,362	7,260

NOTES:
(1) Study area expenditure retention - this is the product of the current market share of the study area stores and centres (the cumulative share of the stores and centres within the study area) and the total study area expenditure. The market share remains constant for each of the forecast years at 32.6%.
(2) Turnover of stores - this is the turnover of stores that is derived from study area expenditure only. We have forecast this turnover to increase by 1.18% per annum between 2010 and 2015, 1.25% per annum from 2015 to 2021, and 1.06% per annum between 2021 and 2026 to acount for sales density growth (which is also included as a separate row). The sales density growth rates are based on our analysis of the historic relationship between sales density and expenditure growth and represent 38% of the comparison goods expenditure growth forecasts set out in Note (2) of Spreadsheet 3.
(3) Special Forms of Trading - we have made an allowance for spending on special forms of trading (SFT) (i.e. outdoor markets, Internet and catalogue shopping) to increase year on year as set out in Spreadsheet 4.
(4) Commitments - this is the turnover of commitments for new floorspace in the study area, which we also assume will increase at the rates set out in Note (2) above to account for improvements in sales densities.
(5) Residual expenditure - the product of the total available expenditure minus the deductions for the existing centres turnover, growth in SFT and commitments.
(6) Comparison assessment - the residual expenditure is converted to a floorspace requirement using a sales density estimate of £4,500 per sq.m in 2010, which is forecast to increase by the rates set out in Note (2) to account for improvements in sales densities. 70% net to gross ratio assumed.

Spreadsheet 7b - Summary of Capacity for Comparison Goods: Scenario B (Moderately Increased Retention Rate: from 32.6% in 2010 to 36.0% by 2026)

	2010	2015	2021	2026	2010-15 Change	2015-21 Change	2021-2026 Change	2010-21 Change	2010-26 Change
Study area expenditure retention (1)									
A. Total study area expenditure (£m)	411.2	491.9	617.7	729.9	80.8	125.8	112.2	206.6	318.7
B. Current retention level of centres within the study area (%)	32.6%	34.3%	36.0%	36.0%					
C. Retained expenditure (£m) (=A*B)	134.1	168.7	222.4	262.8	34.7	53.6	40.4	88.3	128.7
Turnover of stores (2)									
D. Stores' turnover derived from study area (£m)	134.1	142.1	153.1	161.4					
E. Improvement in sales densities of centres (£m)					8.1	11.0	8.3	19.1	27.4
Special Forms of Trading (3)									
F. Growth in Spending on SFT (£m)		12.8	23.6	32.0	12.8	10.8	8.4	23.6	32.0
Commitments (4)									
Mixed use development, Jarvis Porter Site, Hinckley		14.1	15.2	16.0					
Redevelopment four retail units, Castle Street, Hinckley		0.9	1.0	1.0					
G. Turnover from commitments (£m)	0.0	15.0	16.2	17.1	15.0	1.1	0.9	16.2	17.1
H. Residual expenditure (£m) (5)	0.0	-1.2	29.5	52.3	-1.2	30.7	22.8	29.5	52.3
Comparison assessment (6)									
Assumed sales density (£/sq.m)	4,500	4,771	5,140	5,419					
I. Floorspace requirement (net sq.m)	0	-252	5,733	9,654	-252	5,985	3,922	5,733	9,654
J. Floorspace requirement (gross sq.m)	0	-360	8,190	13,792	-360	8,550	5,602	8,190	13,792

NOTES:
(1) Study area expenditure retention - this is the product of the current market share of the study area stores and centres (the cumulative share of the stores and centres within the study area) and the total study area expenditure. The market share moderately increases in each of the forecast years to 36.0% by 2026.
(2) Turnover of stores - this is the turnover of stores that is derived from study area expenditure only. We have forecast this turnover to increase by 1.18% per annum between 2010 and 2015, 1.25% per annum from 2015 to 2021, and 1.06% per annum between 2021 and 2026 to acount for sales density growth (which is also included as a separate row). The sales density growth rates are based on our analysis of the historic relationship between sales density and expenditure growth and represent 38% of the comparison goods expenditure growth forecasts set out in Note (2) of Spreadsheet 3.
(3) Special Forms of Trading - we have made an allowance for spending on special forms of trading (SFT) (i.e. outdoor markets, Internet and catalogue shopping) to increase year on year as set out in Spreadsheet 4.
(4) Commitments - this is the turnover of commitments for new floorspace in the study area, which we also assume will increase at the rates set out in Note (2) above to account for improvements in sales densities.
(5) Residual expenditure - the product of the total available expenditure minus the deductions for the existing centres turnover, growth in SFT and commitments.
(6) Comparison assessment - the residual expenditure is converted to a floorspace requirement using a sales density estimate of £4,500 per sq.m in 2010, which is forecast to increase by the rates set out in Note (2) to account for improvements in sales densities. 70% net to gross ratio assumed.

All monetary values are held constant at 2007 prices.

Spreadsheet 7c - Summary of Capacity for Comparison Goods: Scenario C (Significantly Increased Retention Rate: from 32.6% in 2010 to 40.0% by 2026)

	2010	2015	2021	2026	2010-15 Change	2015-21 Change	2021-2026 Change	2010-21 Change	2010-26 Change
Study area expenditure retention [1]									
A. Total study area expenditure (£m)	411.2	491.9	617.7	729.9	80.8	125.8	112.2	206.6	318.7
B. Current retention level of centres within the study area (%)	32.6%	35.1%	37.5%	40.0%					
C. Retained expenditure (£m) (=A*B)	134.1	172.5	231.9	292.0	38.5	59.3	60.1	97.8	157.9
Turnover of stores [2]									
D. Stores' turnover derived from study area (£m)	134.1	142.1	153.1	161.4					
E. Improvement in sales densities of centres (£m)					8.1	11.0	8.3	19.1	27.4
Special Forms of Trading [3]									
F. Growth in Spending on SFT (£m)		12.8	23.6	32.0	12.8	10.8	8.4	23.6	32.0
Commitments [4]									
Mixed use development, Jarvis Porter Site, Hinckley		14.1	15.2	16.0					
Redevelopment four retail units, Castle Street, Hinckley		0.9	1.0	1.0					
G. Turnover from commitments (£m)	0.0	15.0	16.2	17.1	15.0	1.1	0.9	16.2	17.1
H. Residual expenditure (£m) [5]	0.0	2.6	38.9	81.5	2.6	36.4	42.6	38.9	81.5
Comparison assessment [6]									
Assumed sales density (£/sq.m)	4,500	4,771	5,140	5,419					
I. Floorspace requirement (net sq.m)	0	540	7,578	15,042	540	7,038	7,465	7,578	15,042
J. Floorspace requirement (gross sq.m)	0	771	10,825	21,489	771	10,055	10,664	10,825	21,489

NOTES:
(1) Study area expenditure retention - this is the product of the current market share of the study area stores and centres (the cumulative share of the stores and centres within the study area) and the total study area expenditure. The market share significantly increases in each of the forecast years to 40.0% by 2026.
(2) Turnover of stores - this is the turnover of stores that is derived from study area expenditure only. We have forecast this turnover to increase by 1.18% per annum between 2010 and 2015, 1.25% per annum from 2015 to 2021, and 1.06% per annum between 2021 and 2026 to acount for sales density growth (which is also included as a separate row). The sales density growth rates are based on our analysis of the historic relationship between sales density and expenditure growth and represent 38% of the comparison goods expenditure growth forecasts set out in Note (2) of Spreadsheet 3.
(3) Special Forms of Trading - we have made an allowance for spending on special forms of trading (SFT) (i.e. outdoor markets, Internet and catalogue shopping) to increase year on year as set out in Spreadsheet 4.
(4) Commitments - this is the turnover of commitments for new floorspace in the study area, which we also assume will increase at the rates set out in Note (2) above to account for improvements in sales densities.
(5) Residual expenditure - the product of the total available expenditure minus the deductions for the existing centres turnover, growth in SFT and commitments.
(6) Comparison assessment - the residual expenditure is converted to a floorspace requirement using a sales density estimate of £4,500 per sq.m in 2010, which is forecast to increase by the rates set out in Note (2) to account for improvements in sales densities. 70% net to gross ratio assumed.

All monetary values are held constant at 2007 prices.

Spreadsheet 8 - Definition of Zones

Zone	Postcode	Local Authority
Zone 1	LE10 0	Hinckley and Bosworth
	LE10 1	Hinckley and Bosworth
Zone 2	LE10 2	Hinckley and Bosworth
	LE10 3	Rugby / Hinckley and Bosworth / Blaby
Zone 3	CV11 6	Nuneaton and Bedworth / Rugby
Zone 4	LE9 8	Hinckley and Bosworth
	CV13 6	Hinckley and Bosworth
Zone 5	LE9 9	Hinckley and Bosworth / Blaby
	CV13 0	Hinckley and Bosworth
Zone 6	LE9 7	Hinckley and Bosworth / Blaby
Zone 7	LE9 3	Blaby
	LE9 4	Blaby / Harborough
	LE9 6	Harborough

Notes:

(1) The predominant local authority in each zone is highlighted inbold (ie.the local authority in which the majority of the populated area of the zone is located).

Spreadsheet 9 - Population Projections

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	All Zones Total
Population 2007	30,613	16,981	16,730	13,685	13,602	11,809	18,196	121,616
Population 2010	31,140	17,273	16,979	13,920	13,836	12,012	18,528	123,688
Population 2015	32,003	17,752	17,448	14,306	14,219	12,345	18,957	127,031
Population 2021	33,085	18,352	18,070	14,790	14,700	12,763	19,602	131,362
Population 2026	34,036	18,879	18,540	15,215	15,123	13,129	20,266	135,187
Change in population 2010 - 2015								
Numeric change	863	479	470	386	383	333	430	3,343
Percentage change	2.8%	2.8%	2.8%	2.8%	2.8%	2.8%	2.3%	2.7%
Change in population 2015 - 2021								
Numeric change	1,082	600	622	484	481	418	644	4,331
Percentage change	3.4%	3.4%	3.6%	3.4%	3.4%	3.4%	3.4%	3.4%
Change in population 2021 - 2026								
Numeric change	951	527	470	425	422	367	664	3,826
Percentage change	2.9%	2.9%	2.6%	2.9%	2.9%	2.9%	3.4%	2.9%
Change in population 2010 - 2026								
Numeric change	2,896	1,606	1,561	1,295	1,287	1,117	1,738	11,500
Percentage change	9.3%	9.3%	9.2%	9.3%	9.3%	9.3%	9.4%	9.3%

NOTES:
(1) Population data was sourced from MapInfo and Oxford Economics (mid-year 2007). The population in each zone was projected forward to the base year and forecast years using population multipliers derived from East Midlands Regional Assembly RSS 2009 growth projections (June 2009) for Hinckley and Bosworth and Blaby, and ONS 2006-based Sub-National Population Projections (published 12 June 2008) for Nuneaton and Bedworth.
(2) The population multiplier has been calculated for the predominant local authority in each zone (highlighted in bold in Spreadsheet 8) and has been applied to the total population within that zone.

Spreadsheet 10 - Convenience Goods Expenditure (per capita)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
	£	£	£	£	£	£	£
2007	1,905	1,963	1,745	1,890	1,914	1,883	1,982
2010	1,885	1,942	1,727	1,870	1,894	1,863	1,961
2015	1,981	2,042	1,815	1,966	1,991	1,959	2,062
2021	2,079	2,142	1,904	2,062	2,089	2,055	2,163
2026	2,174	2,240	1,992	2,157	2,184	2,149	2,262

NOTES:
(1) 2007-based per capita convenience expenditure data is sourced from MapInfo and Oxford Economics.
(2) The 2007 MapInfo and Oxford Economics convenience expenditure data has been projected forward to the base year and forecast years using the midpoint of the forecasts provided by Pitney Bowes Business Insight summarised in its Information Brief 09/02 (Table 1 and Table 2, September 2009) and Experian in its Retail Planner Briefing Note 7.1 (Figure 1, August 2009). The forecasts that we have used are as shown in the following table:

Per Capita Convenience Expenditure Growth Forecasts (2007-2026)

Year	Annual Growth Rates		
	Experian	Oxford Economics	RTP Midpoint
2008	0.9%	-0.65%	0.12%
2009	-0.5%	-1.37%	-0.94%
2010	-0.2%	-0.27%	-0.23%
2011	0.6%	0.61%	0.61%
2012	0.8%	1.41%	1.10%
2013	0.8%	1.45%	1.12%
2014	0.8%	1.45%	1.12%
2015	0.8%	1.30%	1.05%
2016	0.8%	0.92%	0.86%
2017	0.9%	0.69%	0.79%
2018	0.9%	0.57%	0.73%
2019	0.9%	0.37%	0.63%
2020	0.9%		0.90%
2021	0.9%		0.90%
2022	0.9%		0.90%
2023	0.9%		0.90%
2024	0.9%		0.90%
2025	0.9%		0.90%
2026	0.9%		0.90%

All monetary values are held constant at 2007 prices.

Spreadsheet 11 - Total Convenience Goods Expenditure & Expenditure Growth

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	All Zones Total
	£m	£m	£m	£m	£m	£m	£m	£m
Total expenditure 2010	58.70	33.55	29.32	26.03	26.21	22.38	36.34	232.53
Spending on SFT in 2010 of average of 4.0%	0.84	1.31	0.00	0.00	1.70	0.79	4.71	9.36
Total expenditure excluding SFT 2010	57.86	32.24	29.32	26.03	24.50	21.59	31.63	223.17
Total expenditure 2015	63.41	36.24	31.67	28.12	28.31	24.18	39.08	251.01
Spending on SFT in 2015 of 5.2%	3.30	1.88	1.65	1.46	1.47	1.26	2.03	13.05
Total expenditure excluding SFT 2015	60.11	34.36	30.02	26.66	26.84	22.92	37.05	237.96
Total expenditure 2021	68.78	39.31	34.41	30.50	30.70	26.23	42.40	272.33
Spending on SFT in 2021 of 5.6%	3.85	2.20	1.93	1.71	1.72	1.47	2.37	15.25
Total expenditure excluding SFT 2021	64.93	37.11	32.48	28.80	28.98	24.76	40.02	257.08
Total expenditure 2026	74.00	42.30	36.92	32.82	33.03	28.21	45.84	293.12
Spending on SFT in 2026 of 5.9%	4.37	2.50	2.18	1.94	1.95	1.66	2.70	17.29
Total expenditure excluding SFT 2026	69.63	39.80	34.74	30.88	31.08	26.55	43.14	275.83
Growth in total expenditure 2010 - 2015	4.71	2.69	2.35	2.09	2.10	1.80	2.74	18.48
Growth in total expenditure 2015 - 2021	5.37	3.07	2.74	2.38	2.40	2.05	3.32	21.32
Growth in total expenditure 2021 - 2026	5.22	2.98	2.51	2.31	2.33	1.99	3.44	20.79
Growth in total expenditure 2010 - 2026	15.30	8.74	7.60	6.78	6.83	5.83	9.50	60.59
Growth in spending on SFT 2010 - 2015	2.45	0.57	1.65	1.46	-0.23	0.46	-2.68	3.69
Growth in spending on SFT 2015 - 2021	0.55	0.32	0.28	0.25	0.25	0.21	0.34	2.20
Growth in spending on SFT 2021 - 2026	0.51	0.29	0.25	0.23	0.23	0.20	0.33	2.04
Growth in spending on SFT 2010 - 2026	3.52	1.19	2.18	1.94	0.25	0.87	-2.01	7.93

NOTES:
(1) The figures in the above table are the product of multiplying the data presented in Spreadsheet 9 (population) by Spreadsheet 10 (per capita convenience goods expenditure), and are in millions of pounds (£m).
(2) The total expenditure includes a proportion of expenditure on Special Forms of Trading (SFT) (i.e. Internet shopping and markets). We have assumed that the proportion of expenditure on SFT in 2010 remains at the levels identified in the 2007 telephone survey of households and varies between the different zones, ranging from 0.00% of expenditure in Zone 3 and Zone 4 to 12.97% of expenditure in Zone 7. For each of the forecast years, we have assumed that the proportion of expenditure spent on SFT in each zone will be 5.2% in 2015, 5.6% in 2021 and 5.9% in 2026 (the levels estimated by Experian in Appendix 3 of Retail Planner Briefing Note 7.1, August 2009).

All monetary values are held constant at 2007 prices.

Spreadsheet 12 - Convenience Goods Spending Percentage in 2010 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
	%	%	%	%	%	%	%
Inside Catchment Area							
Zone 1							
Hinckley Town Centre	7.63	3.75	0.00	2.13	1.08	0.00	0.65
Asda, Barwell Lane, Hinckley, LE10 1SS	42.74	21.52	0.00	44.08	15.44	42.70	11.92
Morrisons, Stoke Road, Hinckley, LE10 1YA	28.47	19.34	5.31	27.58	17.27	14.82	7.71
Somerfield, Hawley Road, Hinckley, LE10 0PR	6.50	29.06	0.00	0.00	0.75	0.00	1.79
Lidl, Hawley Road, Hinckley, LE10 0PR	1.44	3.68	0.53	0.25	0.27	0.31	1.79
Other Stores, Zone 1	3.02	0.51	0.00	0.00	0.75	0.00	1.79
Sub-Total Zone 1	89.80	77.87	5.84	74.05	35.55	57.83	25.65
Zone 2							
Other Stores, Zone 2	0.75	3.53	1.33	0.00	2.03	0.62	0.63
Sub-Total Zone 2	0.75	3.53	1.33	0.00	2.03	0.62	0.63
Zone 3							
Somerfield, Horeston Grange, CV11 6GN	0.00	0.00	13.20	0.68	0.00	0.00	0.00
Co-op, St Nicholas Park Estate, CV11 6DG	0.00	0.00	4.58	0.25	0.00	0.00	0.00
Other stores, Zone 3	0.00	0.00	3.40	0.00	0.75	0.00	0.00
Sub-Total Zone 3	0.00	0.00	21.18	0.94	0.75	0.00	0.00
Zone 4							
Co-op, Malt Mill Bank, Barwell, LE9 8GS	0.00	0.00	0.00	5.35	0.75	0.31	0.00
Other Stores, Barwell	0.00	0.00	0.00	3.47	0.00	0.00	0.00
Sub-Total Zone 4	0.00	0.00	0.00	8.82	0.75	0.31	0.00
Zone 5							
Co-op, Main Street, Market Bosworth, CV13 0JN	0.00	0.00	0.00	0.00	5.94	0.00	0.00
Co-op Supermarket, Newbold Verdon	0.00	0.00	0.00	0.00	5.53	0.00	0.00
Other Stores, Zone 5	0.00	0.00	0.00	0.25	5.59	0.00	0.00
Sub-Total Zone 5	0.00	0.00	0.00	0.25	17.06	0.00	0.00
Zone 6							
Co-op, Wood Street, Earl Shilton, LE9 7ND	0.00	0.00	0.00	1.24	0.75	27.10	0.00
Other Stores, Earl Shilton	0.00	0.00	0.00	0.00	0.00	1.20	0.00
Sub-Total Zone 6	0.00	0.00	0.00	1.24	0.75	28.30	0.00
Zone 7							
Extra Foodstore, Main Street, Broughton Astley	0.00	0.98	0.00	0.00	0.00	0.00	16.86
Other Stores, Zone 7	0.00	0.25	0.00	0.00	0.00	0.31	5.70
Sub-Total Zone 7	0.00	1.24	0.00	0.00	0.00	0.31	22.56
TOTAL WITHIN CATCHMENT AREA	90.55	82.64	28.36	85.31	56.88	87.37	48.84
Outside Catchment Area							
Asda, Newtown Road, Nuneaton, CV11 4FL	2.63	0.00	31.83	3.16	0.00	0.00	0.00
Sainsbury's, Vicarage Street, Nuneaton, CV11 4XS	0.85	1.46	26.08	3.84	0.75	1.40	0.00
Asda, Narborough Road South, Leicester, LE3 2LL	0.00	1.71	0.00	0.68	6.50	1.71	20.00
Morrisons, Whitwick Road, Coalville, LE67 3JN	0.00	0.00	0.00	0.00	8.47	0.00	0.00
Tesco Express, Ryder Road, Kirby Frith, LE3 6UJ	0.43	0.00	0.00	0.94	3.73	0.74	0.63
Other Stores, Coventry	2.71	8.57	7.35	0.00	0.00	1.49	0.63
Other Stores, Leicester	0.59	0.73	0.18	0.94	6.29	1.33	5.78
Other Stores, Nuneaton	0.16	0.00	5.12	1.19	0.81	0.00	0.00
Other Stores, Outside Catchment Area	0.65	0.98	1.09	3.93	10.08	2.41	11.16
Internet	1.44	3.90	0.00	0.00	6.50	3.55	12.97
TOTAL OUTSIDE CATCHMENT AREA	9.45	17.36	71.64	14.69	43.12	12.63	51.16
TOTAL	100.00	100.00	100.00	100.00	100.00	100.00	100.00

NOTES:
(1) A telephone survey of households was undertaken in 2007 assess patterns of spending on convenience goods as part of the Hinckley and Bosworth Borough Retail Capacity Study. As there have been no developments that are likely to materially impact on shopping patterns since the survey was undertaken, we have assumed that spending patterns in 2010 remain as identified from the 2007 household survey.
(2) The Somerfield store at Hawley Road, Hinckley ceased trading in September 2008. The store was subsequently acquired by Tesco, who are now trading on the site. We do not anticipate that this change is likely to have any material impact on shopping patterns across the study area.

Spreadsheet 13 - Convenience Goods Spending Patterns in 2010 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total[1]	All Zones Market Share[2]
	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside Catchment Area									
Zone 1									
Hinckley Town Centre	4.48	1.26	0.00	0.56	0.28	0.00	0.24	6.81	2.9%
Asda, Barwell Lane, Hinckley, LE10 1SS	25.09	7.22	0.00	11.48	4.05	9.56	4.33	61.73	26.5%
Morrisons, Stoke Road, Hinckley, LE10 1YA	16.71	6.49	1.56	7.18	4.52	3.32	2.80	42.58	18.3%
Somerfield, Hawley Road, Hinckley, LE10 0PR	3.82	9.75	0.00	0.00	0.20	0.00	0.65	14.41	6.2%
Lidl, Hawley Road, Hinckley, LE10 0PR	0.84	1.24	0.16	0.07	0.07	0.07	0.65	3.09	1.3%
Other Stores, Zone 1	1.77	0.17	0.00	0.00	0.20	0.00	0.65	2.79	1.2%
Sub-Total Zone 1	52.71	26.13	1.71	19.28	9.32	12.94	9.32	131.41	56.5%
Zone 2									
Other Stores, Zone 2	0.44	1.18	0.39	0.00	0.53	0.14	0.23	2.91	1.3%
Sub-Total Zone 2	0.44	1.18	0.39	0.00	0.53	0.14	0.23	2.91	1.3%
Zone 3									
Somerfield, Horeston Grange, CV11 6GN	0.00	0.00	3.87	0.18	0.00	0.00	0.00	4.05	1.7%
Co-op, St Nicholas Park Estate, CV11 6DG	0.00	0.00	1.34	0.07	0.00	0.00	0.00	1.41	0.6%
Other stores, Zone 3	0.00	0.00	1.00	0.00	0.20	0.00	0.00	1.19	0.5%
Sub-Total Zone 3	0.00	0.00	6.21	0.24	0.20	0.00	0.00	6.65	2.9%
Zone 4									
Co-op, Malt Mill Bank, Barwell, LE9 8GS	0.00	0.00	0.00	1.39	0.20	0.07	0.00	1.66	0.7%
Other Stores, Barwell	0.00	0.00	0.00	0.90	0.00	0.00	0.00	0.90	0.4%
Sub-Total Zone 4	0.00	0.00	0.00	2.30	0.20	0.07	0.00	2.56	1.1%
Zone 5									
Co-op, Main Street, Market Bosworth, CV13 0JN	0.00	0.00	0.00	0.00	1.56	0.00	0.00	1.56	0.7%
Co-op Supermarket, Newbold Verdon	0.00	0.00	0.00	0.00	1.45	0.00	0.00	1.45	0.6%
Other Stores, Zone 5	0.00	0.00	0.00	0.07	1.47	0.00	0.00	1.53	0.7%
Sub-Total Zone 5	0.00	0.00	0.00	0.07	4.47	0.00	0.00	4.54	2.0%
Zone 6									
Co-op, Wood Street, Earl Shilton, LE9 7ND	0.00	0.00	0.00	0.32	0.20	6.07	0.00	6.58	2.8%
Other Stores, Earl Shilton	0.00	0.00	0.00	0.00	0.00	0.27	0.00	0.27	0.1%
Sub-Total Zone 6	0.00	0.00	0.00	0.32	0.20	6.33	0.00	6.85	2.9%
Zone 7									
Extra Foodstore, Main Street, Broughton Astley	0.00	0.33	0.00	0.00	0.00	0.00	6.13	6.46	2.8%
Other Stores, Zone 7	0.00	0.09	0.00	0.00	0.00	0.07	2.07	2.23	1.0%
Sub-Total Zone 7	0.00	0.42	0.00	0.00	0.00	0.07	8.20	8.68	3.7%
TOTAL WITHIN CATCHMENT AREA	53.15	27.73	8.31	22.21	14.90	19.55	17.75	163.61	70.4%
Outside Catchment Area									
Asda, Newtown Road, Nuneaton, CV11 4FL	1.54	0.00	9.33	0.82	0.00	0.00	0.00	11.70	5.0%
Sainsbury's, Vicarage Street, Nuneaton, CV11 4XS	0.50	0.49	7.65	1.00	0.20	0.31	0.00	10.15	4.4%
Asda, Narborough Road South, Leicester, LE3 2LL	0.00	0.58	0.00	0.18	1.70	0.38	7.27	10.11	4.3%
Morrisons, Whitwick Road, Coalville, LE67 3JN	0.00	0.00	0.00	0.00	2.22	0.00	0.00	2.22	1.0%
Tesco Express, Ryder Road, Kirby Frith, LE3 6UJ	0.25	0.00	0.00	0.24	0.98	0.17	0.23	1.86	0.8%
Other Stores, Coventry	1.59	2.88	2.16	0.00	0.00	0.33	0.23	7.18	3.1%
Other Stores, Leicester	0.34	0.24	0.05	0.24	1.65	0.30	2.10	4.93	2.1%
Other Stores, Nuneaton	0.09	0.00	1.50	0.31	0.21	0.00	0.00	2.12	0.9%
Other Stores, Outside Catchment Area	0.38	0.33	0.32	1.02	2.64	0.54	4.05	9.29	4.0%
Internet	0.84	1.31	0.00	0.00	1.70	0.79	4.71	9.36	4.0%
TOTAL OUTSIDE CATCHMENT AREA	5.55	5.83	21.00	3.82	11.30	2.83	18.59	68.92	29.6%
TOTAL	58.70	33.55	29.32	26.03	26.21	22.38	36.34	232.53	100.0%

NOTES:
(1) The spending patterns are calculated by multiplying the total convenience goods expenditure in 2010 (Spreadsheet 11) by the market share at 2010 (Spreadsheet 12). The figures in the 'Total' column are the sum of the expenditure attracted to each centre/store from each zone.
(2) The 'All zones market share' is calculated through dividing the total expenditure attracted by each centre by the total expenditure in the study area.

All monetary values are held constant at 2007 prices.

Spreadsheet 14a - Summary of Capacity for Convenience Goods: Scenario A (Static Retention Rate: 70.4%)

	2010	2015	2021	2026	2010-15 Change	2015-21 Change	2021-2026 Change	2010-21 Change	2010-26 Change
Study area expenditure retention (1)									
A. Total study area expenditure (£m)	232.5	251.0	272.3	293.1	18.5	21.3	20.8	39.8	60.6
B. Current retention level of centres within the study area (%)	70.4%	70.4%	70.4%	70.4%					
C.Retainedexpenditure(£m)(=A*B)	163.6	176.6	191.6	206.2	13.0	15.0	14.6	28.0	42.6
Turnover of stores (2)									
D. Stores' turnover derived from study area (£m)	163.6	167.4	171.2	174.8					
E.Improvementinsalesdensitiesofcentres(£m)					3.8	3.8	3.6	7.6	11.2
Special Forms of Trading (3)									
F.GrowthinSpendingonSFT(£m)		3.7	5.9	7.9	3.7	2.2	2.0	5.9	7.9
Commitments (4)									
Redevelopment for Tesco Express, London Road, Hinckley		2.0	2.1	2.1					
Erection of Tesco Express, High Street, Barwell		3.9	4.0	4.1					
Change to retail use, Lutterworth Road, Burbage		1.1	1.2	1.2					
G.Turnoverfromcommitments(£m)	0.0	7.0	7.2	7.3	7.0	0.2	0.2	7.2	7.3
H. Residual expenditure (£m) (5)	0.0	-1.5	7.4	16.2	-1.5	8.9	8.8	7.4	16.2
Convenience assessment (6)									
Assumed sales density (£/sq.m)	10,000	10,233	10,463	10,682					
I. Floorspace requirement (net sq.m)	0	-150	703	1,517	-150	852	814	703	1,517
J. Floorspace requirement (gross sq.m)	0	-230	1,081	2,334	-230	1,311	1,252	1,081	2,334

NOTES:
(1) Study area expenditure retention - this is the product of the current market share of the study area stores and centres (the cumulative share of the stores and centres within the study area) and the total study area expenditure. The market share remains constant for each of the forecast years at 70.4%.
(2) Turnover of stores - this is the turnover of stores that is derived from study area expenditure only. We have forecast this turnover to increase by 0.46% per annum between 2010 and 2015, 0.37% per annum from 2015 to 2021, and 0.42% per annum between 2021 and 2026 to acount for sales density growth (which is also included as a separate row). The sales density growth rates are based on our analysis of the historic relationship between sales density and expenditure growth and represent 46% of the convenience goods expenditure growth rates set out in Note (2) of Spreadsheet 10.
(3) Special Forms of Trading - we have made an allowance for spending on special forms of trading (SFT) (i.e. outdoor markets and Internet shopping) to increase year on year as set out in Spreadsheet 11.
(4) Commitments - this is the turnover of commitments for new floorspace in the study area, which we also assume will increase at the rates set out in Note (2) above to account for improvements in sales densities.
(5) Residual expenditure - the product of the total available expenditure minus the deductions for the existing centres turnover, growth in SFT and commitments.
(6) Convenience assessment - the residual expenditure is converted to a supermarket floorspace requirement using a sales density estimate of £10,000 per sq.m in 2010, which is forecast to increase by the rates set out in Note (2) to account for improvements in sales densities. 65% net to gross ratio assumed.

All monetary values are held constant at 2007 prices.

Spreadsheet 14b - Summary of Capacity for Convenience Goods: Scenario B (Increased Retention Rate: from 70.4% in 2010 to 80.0% by 2026)

	2010	2015	2021	2026	2010-15 Change	2015-21 Change	2021-2026 Change	2010-21 Change	2010-26 Change
Study area expenditure retention [1]									
A. Total study area expenditure (£m)	232.5	251.0	272.3	293.1	18.5	21.3	20.8	39.8	60.6
B. Current retention level of centres within the study area (%)	70.4%	75.2%	80.0%	80.0%					
C.Retainedexpenditure(£m)(=A*B)	163.6	188.7	217.9	234.5	25.1	29.2	16.6	54.3	70.9
Turnover of stores [2]									
D. Stores' turnover derived from study area (£m)	163.6	167.4	171.2	174.8					
E.Improvementinsalesdensitiesofcentres(£m)					3.8	3.8	3.6	7.6	11.2
Special Forms of Trading [3]									
F.GrowthinSpendingonSFT(£m)		3.7	5.9	7.9	3.7	2.2	2.0	5.9	7.9
Commitments [4]									
Redevelopment for Tesco Express, London Road, Hinckley		2.0	2.1	2.1					
Erection of Tesco Express, High Street, Barwell		3.9	4.0	4.1					
Change to retail use, Lutterworth Road, Burbage		1.1	1.2	1.2					
G.Turnoverfromcommitments(£m)	0.0	7.0	7.2	7.3	7.0	0.2	0.2	7.2	7.3
H. Residual expenditure (£m) [5]	0.0	10.6	33.6	44.5	10.6	23.0	10.9	33.6	44.5
Convenience assessment [6]									
Assumed sales density (£/sq.m)	10,000	10,233	10,463	10,682					
I. Floorspace requirement (net sq.m)	0	1,033	3,212	4,162	1,033	2,179	950	3,212	4,162
J. Floorspace requirement (gross sq.m)	0	1,589	4,941	6,403	1,589	3,352	1,462	4,941	6,403

NOTES:
(1) Study area expenditure retention - this is the product of the current market share of the study area stores and centres (the cumulative share of the stores and centres within the study area) and the total study area expenditure. The market share remains increases in each of the forecast years to 80.0% by 2026.
(2) Turnover of stores - this is the turnover of stores that is derived from study area expenditure only. We have forecast this turnover to increase by 0.46% per annum between 2010 and 2015, 0.37% per annum from 2015 to 2021, and 0.42% per annum between 2021 and 2026 to acount for sales density growth (which is also included as a separate row). The sales density growth rates are based on an analysis of the historic relationship between sales density and expenditure growth and represent 46% of the convenience goods expenditure growth rates set out in Note (2) of Spreadsheet 10.
(3) Special Forms of Trading - we have made an allowance for spending on special forms of trading (SFT) (i.e. outdoor markets and Internet shopping) to increase year on year as set out in Spreadsheet 11.
(4) Commitments - this is the turnover of commitments for new floorspace in the study area, which we also assume will increase at the rates set out in Note (2) above to account for improvements in sales densities.
(5) Residual expenditure - the product of the total available expenditure minus the deductions for the existing centres turnover, growth in SFT and commitments.
(6) Convenience assessment - the residual expenditure is converted to a supermarket floorspace requirement using a sales density estimate of £10,000 per sq.m in 2010, which is forecast to increase by the rates set out in Note (2) to account for improvements in sales densities. 65% net to gross ratio assumed.

All monetary values are held constant at 2007 prices.

Spreadsheet 14c - Summary of Capacity for Convenience Goods: Scenario C (Increased Retention Rate: from 70.4% in 2010 to 80.0% by 2026 with an Allowance for Over-trading)

	2010	2015	2021	2026	2010-15 Change	2015-21 Change	2021-2026 Change	2010-21 Change	2010-26 Change
Study area expenditure retention (1)									
A. Total study area expenditure (£m)	232.5	251.0	272.3	293.1	18.5	21.3	20.8	39.8	60.6
B. Current retention level of centres within the study area (%)	70.4%	75.2%	80.0%	80.0%					
C.Retained expenditure (£m)(=A*B)	163.6	188.7	217.9	234.5	25.1	29.2	16.6	54.3	70.9
Turnover of stores (2)									
D. Stores' turnover derived from study area (£m)	163.6	167.4	171.2	174.8					
E.Improvement in sales densities of centres(£m)					3.8	3.8	3.6	7.6	11.2
Special Forms of Trading (3)									
F. Growth in Spending on SFT(£m)		3.7	5.9	7.9	3.7	2.2	2.0	5.9	7.9
Commitments (4)									
Redevelopment for Tesco Express, London Road, Hinckley		2.0	2.1	2.1					
Erection of Tesco Express, High Street, Barwell		3.9	4.0	4.1					
Change to retail use, Lutterworth Road, Burbage		1.1	1.2	1.2					
G.Turnover from commitments (£m)	0.0	7.0	7.2	7.3	7.0	0.2	0.2	7.2	7.3
Allowance for over-trading (£m) (5)		52.0	52.0	52.0					
H. Residual expenditure (£m) (6)	0.0	62.6	85.6	96.5	10.6	23.0	10.9	33.6	44.5
Convenience assessment (7)									
Assumed sales density (£/sq.m)	10,000	10,233	10,463	10,682					
I. Floorspace requirement (net sq.m)	0	6,114	8,181	9,029	6,114	2,067	848	8,181	9,029
J. Floorspace requirement (gross sq.m)	0	9,406	12,586	13,891	9,406	3,181	1,305	12,586	13,891

NOTES:
(1) Study area expenditure retention - this is the product of the current market share of the study area stores and centres (the cumulative share of the stores and centres within the study area) and the total study area expenditure. The market share remains increases in each of the forecast years to 80.0% by 2026.
(2) Turnover of stores - this is the turnover of stores that is derived from study area expenditure only. We have forecast this turnover to increase by 0.46% per annum between 2010 and 2015, 0.37% per annum from 2015 to 2021, and 0.42% per annum between 2021 and 2026 to acount for sales density growth (which is also included as a separate row). The sales density growth rates are based on an analysis of the historic relationship between sales density and expenditure growth and represent 46% of the convenience goods expenditure growth rates set out in Note (2) of Spreadsheet 10.
(3) Special Forms of Trading - we have made an allowance for spending on special forms of trading (SFT) (i.e. outdoor markets and Internet shopping) to increase year on year as set out in Spreadsheet 11.
(4) Commitments - this is the turnover of commitments for new floorspace in the study area, which we also assume will increase at the rates set out in Note (2) above to account for improvements in sales densities.
(5) Over-trading - we have made an allowance in each of the forecast years for £52.9m over-trading in the base year.
(6) Residual expenditure - the product of the total available expenditure minus the deductions for the existing centres turnover, growth in SFT and commitments.
(7) Convenience assessment - the residual expenditure is converted to a supermarket floorspace requirement using a sales density estimate of £10,000 per sq.m in 2010, which is forecast to increase by the rates set out in Note (2) to account for improvements in sales densities. 65% net to gross ratio assumed.

APPENDIX 5

Health Check

HEALTH CHECK OF HINCKLEY TOWN CENTRE

ROGER TYM & PARTNERS
Planners and Development Economists

Appendix 5

March 2010

ROGER TYM & PARTNERS

3 Museum Square
Leicester
LE1 6UF

t 0116 249 3970
f 0116 249 3971
e leicester@tymconsult.com
w

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1 INTRODUCTION

1.1 In order to understand both the strengths and deficiencies of Hinckley Town Centre, we have undertaken a detailed review of the centre's existing function, character, composition and performance based on detailed site surveys and desk-based research. Our review of the health of Hinckley Town Centre also forms an important piece of evidence that has informed our assessment of the likely impact of the proposed scheme on existing retailers within the town centre (as set out in Section 5 of our Retail Statement).

1.2 Our assessment of the 'health', or the vitality and viability, of Hinckley Town Centre is based upon examination of the 13 indicators specified in Annex D of PPS4 (Indicators A1 to A13). We have also considered one additional indicator, which is not listed in PPS4, namely movement in the national retail rankings (which we have labelled as Indicator A0). Wherever possible, we have analysed Hinckley's performance using time-series data, which is more useful than simply presenting current data.

1.3 We do not consider that it is necessary to undertake 'health checks' of the 11 Local Shopping Centres in the Borough, as listed in Policy Retail 7 of the Local Plan. These 11 centres are very small in scale, and have localised roles, providing residents with 'top-up' food and grocery items and day-to-day services, but with a limited comparison retail offer. We do not consider that the proposed scheme will have a material impact on the role or function of these centres, and so we have not undertaken detailed 'health checks' of these centres.

2 THE PERFORMANCE INDICATORS

Indicator A0: Retail Rankings

2.1 We have assessed the movement of Hinckley Town Centre in Management Horizon Europe's UK Shopping Index, between 1998/99 and 2008, and the results are summarised in Table 2.1 below. Table 2.1 shows that Hinckley's position in the rankings improved by 40 places (from 283rd position to 243rd position) between 1998/99 and 2003/04. Since no significant retail development took place in Hinckley over this period, it is likely that the centre's apparent rise in the rankings is primarily the result of minor methodological changes by MHE in the way it ranks the centres. Between 2003/04 and 2008 (the latest rankings), Hinckley's position in the UK Shopping Index slipped slightly by five places (to 249th rank). However, this does not represent a major change, and the standing of Hinckley Town Centre appears to have remained relatively static over the last five year period.

2.2 Table 2.1 shows that the competing, neighbouring centres of Leicester, Coventry and Nuneaton are ranked significantly higher than Hinckley in the retail rankings, as would be expected, given their larger scale. Of more concern is the fact that Fosse Shopping Park, in Leicester, has recently risen in the retail rankings and is closing the gap with Hinckley Town Centre. Over 15 per cent of the comparison expenditure available to residents of the Hinckley catchment area currently flows to Fosse Park, and Hinckley must consolidate and improve the quality of its retail offer if it is to compete more effectively with destinations such as Fosse Park.

Table 2.1 – Movement of Hinckley Town Centre and Comparator Centres in the MHE Retail Rankings between 1998/99 and 2008

Centre	1998/99	2000/01	2003/04	2008	Change 1998-2008	Change 2003-2008
Hinckley	283	292	243	249	34	-5
Leicester	9	11	10	14	-5	-4
Coventry	33	37	41	60	-27	-19
Nuneaton	168	170	138	103	65	35
Fosse Pk, Leicester	431	421	382	355	76	27

Source: Management Horizon Europe, UK Shopping Index (1998/99 to 2008)

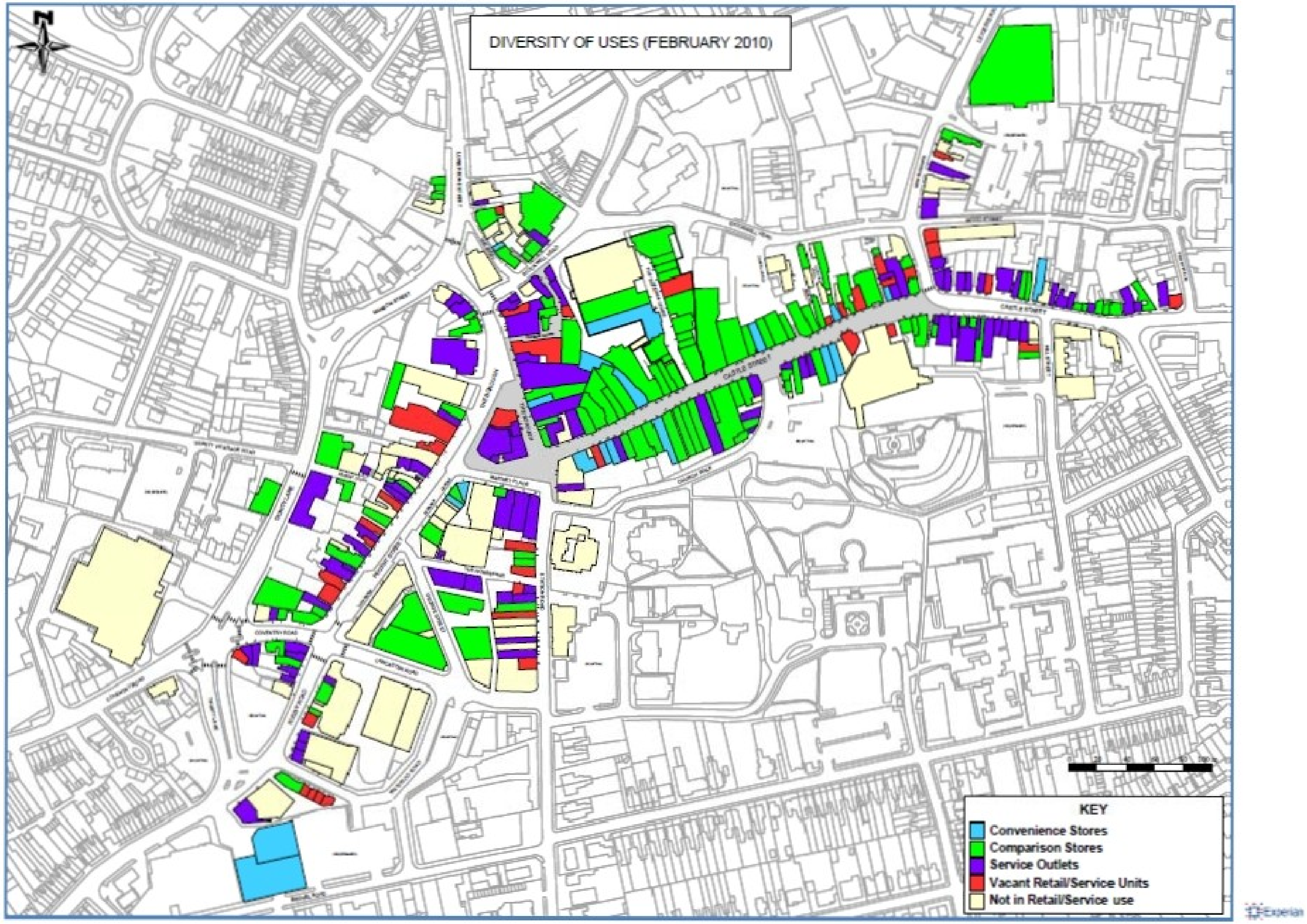
Indicator A1: Diversity of Main Town Centre Uses

2.3 Experian's latest GOAD survey of Hinckley Town Centre was undertaken in July 2009, and it compares the representation of convenience, comparison, and service uses (and their respective sub-sectors) to UK averages; hence it is possible to identify areas in which Hinckley may have a shortfall. We also undertook a thorough audit of each retail and service unit in Hinckley Town Centre in February 2010, and we have updated Experian's GOAD data accordingly. The current diversity of uses in Hinckley Town Centre is shown in Figure 2.1 below, and is summarised in Table 2.2.

Table 2.2 Diversity of Uses in Hinckley Town Centre (February 2010)

Goad Code	Operator Type	No. of Units				Floorspace			
		No. of units	% of Total	UK Average %	Index (UK=100)	Floorspace (sq.m)	% of Total	UK Average %	Index (UK=100)
	Number (and %) of Convenience Goods Outlets								
G1A	Bakers	5	1.82%	1.96%	93	1370	2.81%	1.01%	278
G1B	Butchers	3	1.09%	0.83%	131	340	0.70%	0.45%	155
G1C	Greengrocers & fishmongers	2	0.73%	0.66%	110	240	0.49%	1.30%	38
G1D	Grocery and frozen foods	4	1.45%	3.00%	48	2140	4.39%	12.41%	35
G1E	Off-licences and home brew	1	0.36%	0.71%	51	160	0.33%	0.46%	71
G1F	Confectioners, tobacconists, newsagents	4	1.45%	2.36%	62	420	0.86%	1.79%	48
	TOTAL	19	6.91%	9.53%	72	4670	9.57%	17.41%	55
	Number (and %) of Comparison Goods Outlets								
G2A	Footwear & repair	5	1.82%	2.00%	91	540	1.11%	1.42%	78
G2B	Men's & boys' wear	2	0.73%	1.04%	70	700	1.44%	0.89%	161
G2C	Women's, girls, children's clothing	18	6.55%	4.95%	132	2280	4.67%	4.33%	108
G2D	Mixed and general clothing	6	2.18%	3.44%	63	860	1.76%	5.80%	30
G2E	Furniture, carpets & textiles	11	4.00%	3.83%	104	3220	6.60%	4.33%	152
G2F	Booksellers, arts/crafts, stationers/copy bureaux	11	4.00%	3.96%	101	1980	4.06%	3.12%	130
G2G	Electrical, home entertainment, telephones and video	15	5.45%	4.14%	132	1470	3.01%	3.26%	92
G2H	DIY, hardware & household goods	7	2.55%	2.88%	88	5950	12.20%	5.22%	234
G2I	Gifts, china, glass and leather goods	3	1.09%	1.65%	66	210	0.43%	0.90%	48
G2J	Cars, motorcycles & motor accessories	2	0.73%	1.32%	55	1680	3.44%	2.06%	167
G2K	Chemists, toiletries & opticians	8	2.91%	3.92%	74	1880	3.85%	3.98%	97
G2L	Variety, department & catalogue showrooms	3	1.09%	0.67%	163	2780	5.70%	7.03%	81
G2M	Florists and gardens	2	0.73%	1.03%	71	100	0.21%	0.46%	45
G2N	Sports, toys, cycles and hobbies	11	4.00%	2.20%	182	1550	3.18%	2.39%	133
G2O	Jewellers, clocks & repair	5	1.82%	2.12%	86	620	1.27%	0.97%	131
G2P	Charity shops, pets and other comparison	10	3.64%	3.74%	97	1450	2.97%	2.57%	116
	TOTAL	119	43.27%	42.90%	101	27270	55.90%	48.74%	115
	Number (and %) of Service Uses								
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	33	12.00%	15.10%	79	4660	9.55%	9.71%	98
G3B	Hairdressers, beauty parlours & health centres	23	8.36%	7.94%	105	1580	3.24%	3.79%	85
G3C	Laundries & dry cleaners	0	0.00%	1.00%	0	0	0.00%	0.47%	0
G3D	Travel agents	7	2.55%	1.35%	189	530	1.09%	0.81%	134
G3E	Banks & financial services (incl. accountants)	13	4.73%	4.19%	113	3020	6.19%	4.60%	135
G3F	Building societies	3	1.09%	0.61%	179	840	1.72%	0.51%	338
G3G	Estate agents & auctioneers	17	6.18%	3.86%	160	1520	3.12%	2.15%	145
	TOTAL	96	34.91%	34.04%	103	12150	24.91%	22.03%	113
	Number (and %) of Miscellaneous Uses								
G4A	Employment, careers, Post Offices and information	2	0.73%	1.23%	59	240	0.49%	1.01%	49
G4B	Vacant units (all categories)	39	14.18%	12.30%	115	4450	9.12%	10.81%	84
	TOTAL	41	14.91%	13.53%	110	4690	9.61%	11.82%	81
	GRAND TOTAL	275	100.00%	100.00%		48780	100.00%	100.00%	

Figure 2.1 Diversity of Uses (February 2010)



2.4 Table 2.2 shows that Hinckley Town Centre contains 19 convenience outlets, which equates to 6.9 per cent of the total units compared to the UK average of 9.5 per cent. Whilst there is a range of convenience outlets in Hinckley, with the town centre benefiting from five bakers, three butchers, two greengrocers and two small supermarkets, we note that there are no food superstores. Indeed, although there are Iceland and Sainsbury's stores in the town centre, together these units provide less than 2,000 sq.m of gross floorspace, which is not sufficient to meet residents' main food and grocery shopping needs. As the household survey shows, the majority of residents in the Borough currently travel to the out-of-centre Asda and Morrison foodstores, which reflects the deficiency in large-format foodstore provision in the town centre. Reflecting the small scale of the convenience goods offer in Hinckley, only 9.6 per cent of the floorspace in the town centre is occupied by this type of retail, compared to a national average of 17.4 per cent. We consider, therefore, that Hinckley has a limited convenience offer and would benefit from the provision of a town centre superstore.

2.5 Table 2.2 shows that the 119 comparison goods outlets in the town centre equate to 43.3 per cent of the total units, which is close to the UK average of 42.9 per cent. The town has above-average representation in the 'women's, girls, children's clothing' sub-sector, which is a key determinant of a centre's attractiveness to shoppers. There is also strong representation in the 'electrical, home entertainment, telephones and video' and 'sports, toys, cycles and hobbies' sub-sectors. No sub-sectors are missing from the town centre or are significantly under-represented in numerical terms. Thus, in numeric terms at least, Hinckley Town Centre has a good representation of comparison outlets. We consider the nature of the specific retailers present in the town centre in more detail below, under Indicator A4.

2.6 The overall proportion of service sector outlets in Hinckley Town Centre (34.9 per cent) is also in line with the UK average (34.0 per cent). Figure 2.1 shows that the service uses are generally located in the secondary areas of Hinckley Town Centre; at the eastern end of Castle Street, around The Borough, and along Regent Street and Rugby Road. It should be noted, however, that there is an under-representation of outlets in the 'restaurants, cafés, coffee bars, fast food & take-aways' sub-sector, since the 33 outlets in this sub-sector equates to 12.0 per cent of all town centre units, which is below the UK average of 15.1 per cent. The existing food and drink outlets also cater for a narrow market, as we discuss below under Indicator A4.

2.7 Hinckley Town Centre benefits from the presence of the Concordia Theatre. However, the town centre's leisure offer is otherwise deficient, as there is an absence of any other forms of family entertainment venues, such as a cinema or bowling alley.

Indicator A2: The Amount of Retail, Leisure and Office Floorspace in Edge-of-Centre and Out-of-Centre Locations

2.8 There is limited out-of-centre comparison floorspace in Hinckley. The Hinckley Retail Park, at Sword Drive, is located around two miles to the north of the town centre. However, the retail park only consists of approximately 3,750 sq.m of retail floorspace, and accommodates a Halfords store and a Focus showroom. Our 2007 household survey found that only 1 per cent of comparison expenditure available to residents in the catchment area flows to the retail park, which equates to around £4.7m. The existing out-of-centre comparison retail floorspace in Hinckley is, therefore, relatively small in scale; it does not have a major influence on local shopping patterns and does not pose a serious threat to the vitality and viability of the town centre.

2.9 The scale of out-of-centre convenience floorspace is more significant, however, in the Hinckley context. There are two out-of-centre superstores, which are again located to the north of the town centre; an Asda store at Barwell Lane (3,200 sq.m sales area floorspace) and a Morrisons store at Stoke Road (2,800 sq.m sales area). The two stores are the main destinations for food and grocery shopping within the Borough. Our 2007 household survey found that the Asda and Morrisons stores together account for 45 per cent of expenditure available to residents of the Hinckley catchment area, which equates to over £100m. The popularity of these out-of-centre stores is partly a consequence of the fact that there is no food superstore within Hinckley Town Centre itself. Although there is a Sainsbury store at the application site, this only provides 850 sq.m of sales floorspace at present, which is not sufficient to meet the full requirements of residents.

2.10 We note that it is the Council's aspiration - as set out in the emerging Hinckley Town Centre Area Action Plan (HTCAAP) - to increase and improve the range of retail provision in the town centre, and to enhance Hinckley Town Centre's image. In order to meet this objective, opportunities should be taken to provide additional comparison and convenience floorspace in Hinckley Town Centre, whilst the expansion of out-of-centre floorspace should be limited. The current application scheme is in line with the Council's aspirations for Hinckley, and it will address the current deficiency in convenience floorspace in the town centre.

Indicator A3: The Potential Capacity for Growth or Change

2.11 The existing retail property in Hinckley Town Centre is, in general, dated, poorly configured and small in size. Indeed, our analysis of Experian's GOAD data for Hinckley indicates that the 39 currently vacant units in Hinckley Town Centre (GOAD definition) have an 'average' gross floorspace of only 1,225 sq.ft (115 sq.m), which translates to an 'average' sales area of approximately 860 sq.ft (80 sq.m)[1]. Thus, there is a noticeable absence of available units in the town centre of a suitable configuration and sufficient size to satisfy the floorspace requirements of modern retail operators. The most appropriate way to expand and enhance Hinckley Town Centre, through the attraction of new retail and commercial leisure operators, is therefore through the development of new retail floorspace.

2.12 The emerging HTCAAP identifies nine 'Strategic Development Areas' (SDAs), which offer potential for redevelopment to meet the Council's aims and objectives for the town centre. The nine SDAs and the uses proposed in the HTCAAP for each area are summarised in Table 2.3 below.

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

Table 2.3 – Summary of the Ten 'Strategic Development Areas' Identified in the Submission Draft Hinckley Town Centre Area Action Plan

Policy	Strategic Development Area	Main Proposed Uses
Policy 2	Stockwell Head / Concordia Theatre	Mixed-use development including office and commercial floorspace and residential units. Enhancement of public realm.
Policy 3	Atkins Factory	North Warwickshire & Hinckley College, creative enterprise centre.
Policy 4	Britannia Centre / Castle Street	Comparison retail scheme, creation of a new retail circuit, improve connectivity between Castle Street and Stockwell Head.
Policy 5	Land North of Mount Road	Retention and enhancement of Argents Mead and the memorial gardens, Mixed-use development, including residential, office space and community facilities.
Policy 6	Leisure Centre	Residential.
Policy 7	Rugby Road / Hawley Road	Mixed-use development incorporating residential, commercial and other employment uses.
Policy 8	Railway Station, Southfield Road	Office-led development, creation of a transport interchange, small retail units.
Policy 9	Bus Station	Mixed-use scheme to be anchored by a superstore, and include office/commercial floorspace, cafes, restaurants and comparison retail units. Provision of a cinema and other leisure uses, and an enhanced bus station.
Policy 10	North Warwickshire and Hinckley College Sites	Mixed-use scheme focused on offices and residential units, and provision of landscaped open space.

2.13 Each of the nine SDAs offers potential for some redevelopment to accommodate new uses within and around Hinckley Town Centre. There is, therefore, scope for Hinckley Town Centre to expand to meet the Borough's future requirements for additional town centre uses.

2.14 However, it is clear from Table 2.3 that only two of the sites – namely the Britannia Centre and the Bus Station sites - are suitable to accommodate a significant amount of new retail and leisure development. The Bus Station site, in particular, has been identified by the Council as the most appropriate location in the town centre to meet the majority of the quantitative need for additional comparison and convenience floorspace in the Borough in the period up to 2021. The successful delivery of the application scheme is therefore critical, because it represents the main opportunity to substantially expand and improve the retail and commercial leisure offer in Hinckley Town Centre.

Indicator A4: Retailer Representation and Intentions to Change Representation

2.15 Hinckley's convenience goods offer includes some national multiple operators, including Bakers Oven, Greggs, Iceland, Thorntons, Holland & Barrett, and Sainsbury's. However, as we explain above, these stores are small in scale and each provides only a relatively limited offer. Indeed, even the Sainsbury's store provides only around 850 sq.m of sales floorspace at present, which is not sufficient to meet the requirements of local residents. As such, the majority of residents travel to the out-of-centre Asda and Morrisons superstores to undertake their main food and grocery shop. This again highlights the fact that there is a qualitative need for a mainstream superstore within the town centre itself, to claw-back expenditure that currently leaks to out-of-centre destinations.

2.16 There is a reasonably wide range of comparison retail multiples in the town centre, including Argos, Clarks, Dorothy Perkins, New Look, Clinton Cards, WH Smith, Currys, Boots and H Samuel. These retailers are primarily focused within Hinckley's indoor shopping centre, the Britannia Centre, and along Castle Street. However, most of these retailers are towards the lower and value-end of the market. Indeed, the 'Fashion Count' in MHE's 2008 UK Shopping Index indicates that only 17 per cent of Hinckley's 'fashion' retailers can be described as 'middle' order, 58 per cent are 'lower-middle', and 25 per cent represent 'value' fashion. None of the fashion retailers are classified as 'upper-middle' in quality, or above. Thus, Hinckley attains an overall 'lower' rating for fashion in the MHE Index. Conversely, the neighbouring competitor destinations of Leicester, Coventry, Nuneaton and Fosse Shopping Park each achieve 'middle' fashion market positions in the MHE Index, which explains, in part, why residents of the Hinckley OCA are attracted to these destinations, which offer better quality retail outlets than Hinckley.

2.17 The town centre does contain a number of service sector multiples, with several banks and building societies occupying premises in Market Place and The Borough, and a number of national travel agents. There is also representation from a range of national fast food outlets and pub/bar chains, including JD Wetherspoon and Barracuda Bar, although these establishments primarily cater for the 18-30 age group and it is clear that there is a need for new food and drink outlets that cater for a wider client base.

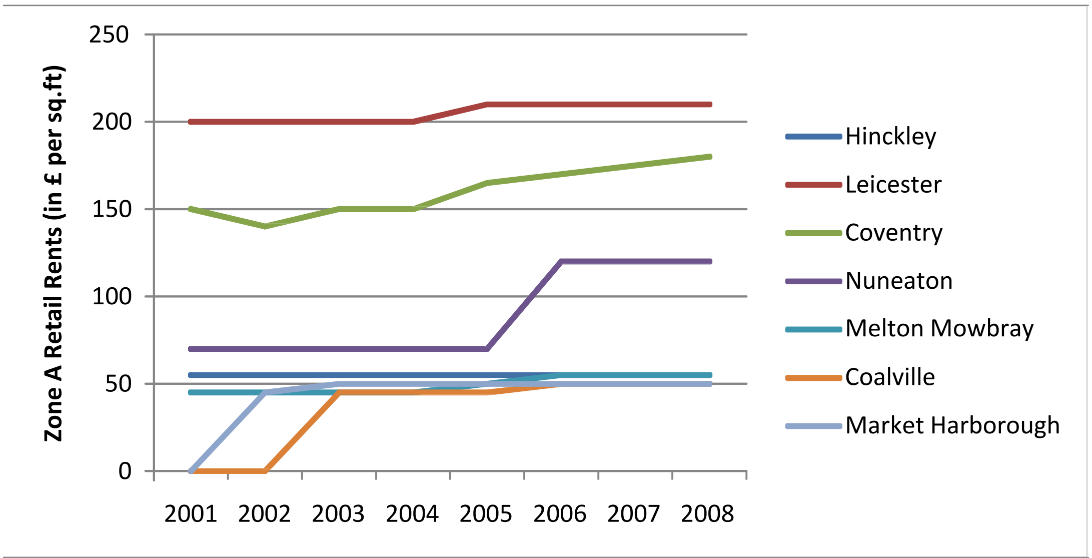
2.18 Delivery of the proposed scheme will allow many new retailers and service operators to establish themselves in Hinckley Town Centre. The scheme will include provision of a food superstore to address the deficiency in main food shopping opportunities in the town centre; and it will also provide 18 non-food retail units which could accommodate some higher-order fashion multiples, in addition to a cinema, bowling alley, and several new restaurants and cafes.

Indicator A5: Shopping Rents

2.19 Figure 2.2 below charts the absolute movement in Zone A retail rents in Hinckley and several comparator centres in the period between 2001 and 2008 (which is the latest date for which rental data are available from Colliers CRE).

2.20 Figure 2.2 shows that, as would be expected, absolute Zone A rents in 2008 were highest in the larger comparator centres of Leicester (£210 per sq.ft), Coventry (£180 per sq.ft) and Nuneaton (£120 per sq.ft). At £55 per sq.ft in 2008, rents in Hinckley were on a par with those achieved in similar-sized comparator centres (for example, Melton Mowbray also commands rents of £55 per sq.ft, whilst Coalville and Market Harborough achieve rents of £50 per sq.ft). It is notable, however, that whilst published Zone A retail rents in all of the comparator centres have shown signs of improvement between 2001 and 2008, rents in Hinckley have remained static throughout, which is reflective of the lack of investment in the centre in recent years.

Figure 2.2 - Zone A Retail Rents in Hinckley and Six Comparator Centres, between 2001 and 2008 (in £ per sq.ft)



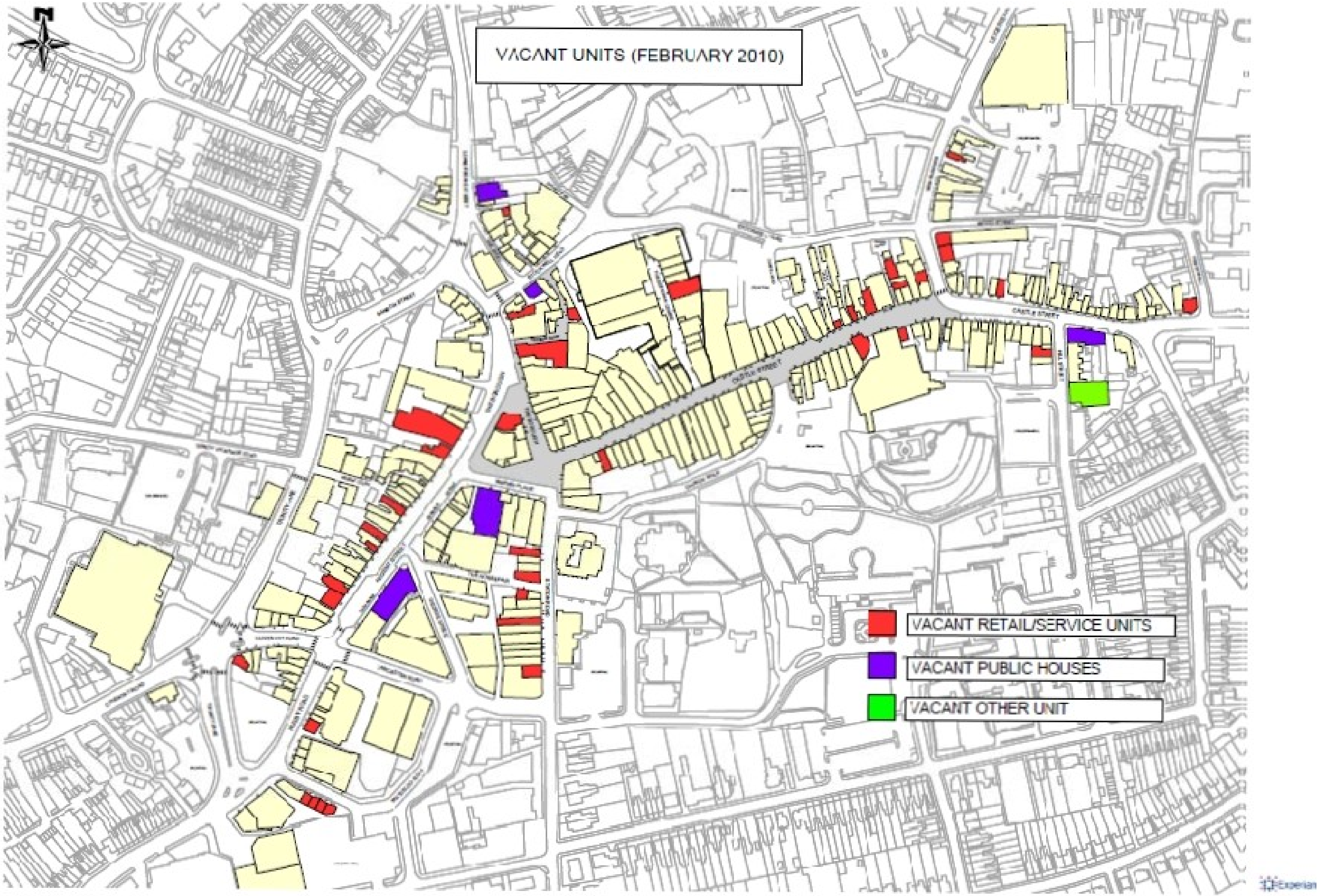
Indicator A6: Proportion of Vacant Street Level Property

2.21 In February 2010 there were 39 vacant units in Hinckley Town Centre, which equates to 14.2 per cent of all town centre units. This is above the UK average of 12.3 per cent, and also represents an increase on the vacancy rate of 11.3 per cent which was observed in December 2006 when we undertook our health check of the centre for the Hinckley & Bosworth Borough-wide Retail Study. However, we note that in terms of floorspace, only 9.6 per cent of the town centre's total floorspace is currently vacant, which is lower than the UK average of 11.8 per cent.

2.22 We also note that LSH undertook a survey of Hinckley Town Centre in April 2010 (subsequent to our fieldwork), as reported in its 'Retail Review Report'. LSH found that the number of vacancies has since dropped to 37 units, representing a vacancy rate of 13.5 per cent, which is more in line with the national average.

2.23 Furthermore, in Figure 2.3 below we have highlighted the vacant units (as at February 2010) on an Experian Goad plan, which shows that many of the vacant units, particularly the recent vacancies, are in secondary locations within the town centre, such as the eastern end of Castle Street, and along Regent Street and Station Road. We note that the proposed development scheme at the Bus Station site will create a new retail and leisure anchor towards the south-west of the centre, which will complement the existing retail offer along Castle Street. We anticipate that the proposed scheme will secure a significant increase in retail activity and will create a new retail circuit, generating shopper flows along Regent Street and Station Road, as pedestrians move between the application scheme and Castle Street. The increase in footfall along these otherwise secondary streets is likely to improve the trading conditions in these areas and stem the rise in vacancies.

Figure 2.3 Vacant Units (February 2010)

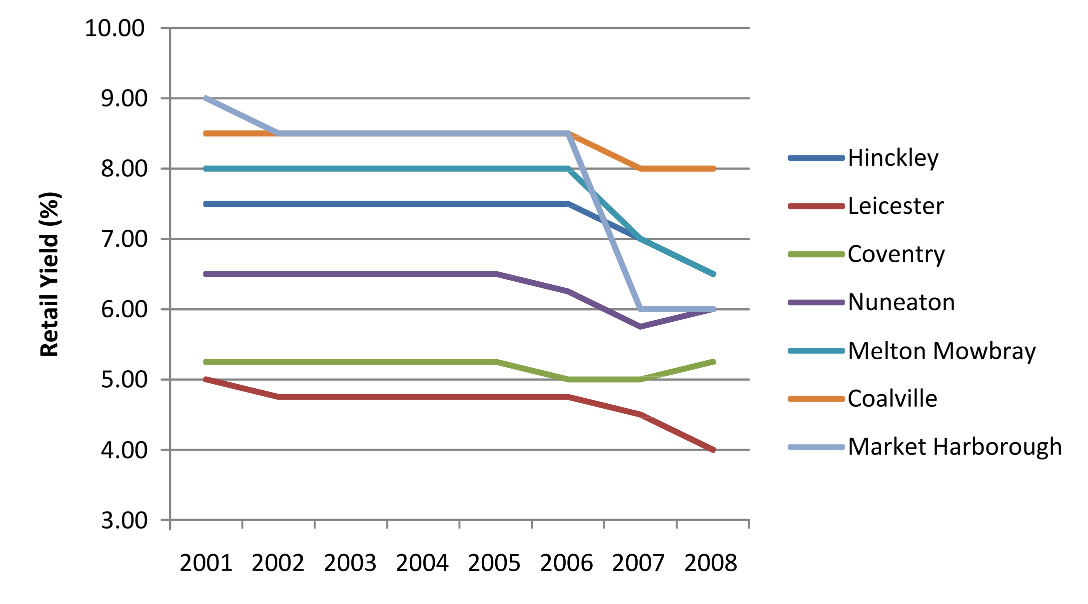


Indicator A7: Commercial Yields on Non-Domestic Property

2.24 Figure 2.4 below shows that prime retail yields improved slightly between April 2001 and January 2008 in Hinckley and, indeed, all of the comparator centres, with the exception of Coventry where yields remained relatively static.

2.25 Whilst prime retail yields in January 2008 are significantly lower (better) than Hinckley in Leicester (4.0 per cent) and Coventry (5.25 per cent), this is to be expected given the higher-order status of these centres in the retail rankings. It is notable that in January 2008 Hinckley achieved comparable yields to the similar-sized benchmark centres, and to Nuneaton, which is much higher in the retail rankings than Hinckley (i.e. Hinckley 6.5 per cent, Melton Mowbray 6.5 per cent, Nuneaton and Market Harborough both 6.0 per cent).

Figure 2.4 - Retail Yields (in %) in Hinckley and Six Comparator Centres, between April 2001 and January 2008



Indicator A8: Land Values and Length of Time Sites Have Remained Undeveloped

2.26 This is a new indicator, which was introduced by PPS4 in December 2009. Our interpretation of Annex D of PPS4 (which describes each of the health check indicators) is that this indicator primarily relates to vacant, undeveloped sites in town centres, and has been designed to encourage local authorities to explore mechanisms to bring such sites back into active economic use.

2.27 The indicator is not particularly relevant to Hinckley Town Centre, which has no large parcels of undeveloped land, albeit there are some areas of underused land. In this respect, we note that the application site itself is an area of the town centre which is not fulfilling its potential, as it is currently occupied by a range of low-grade uses. However, the application scheme will secure redevelopment of the Bus Station site for a mix of commercial uses, in line with the Council's strategy, as set out in the adopted Core Strategy and the emerging HTCAAP.

Indicator A9: Pedestrian Flows (Footfall)

2.28 We are not aware of any formal pedestrian flow counts undertaken recently in Hinckley Town Centre. Nonetheless, we have found the town centre to be busy on all occasions that we have undertaken on-foot surveys of Hinckley, although this may in part be due to the midday timings of our visits. We understand that footfall drops off sharply in the evenings, largely due to the shortfall in restaurants and bars in the centre, and the lack of family entertainment venues to attract an evening economy. The proposed scheme is, however, expected to increase usage of the centre outside normal shop opening hours, through the provision of several new restaurants and cafes, a cinema and a bowling alley, which will improve the general vitality of the centre.

Indicator A10: Accessibility

2.29 Hinckley Town Centre is reasonably accessible by a variety of modes of transport. The town centre can be reached by car via a number of arterial routes from the M69 and A5, and can thus be easily accessed from the national and local road network.

2.30 Hinckley also benefits from a railway station, which, although not located in the heart of the town centre, is only a short walk to the main town centre shops and services, and is certainly within easy walking distance of the application site. The town centre also has a bus station, which will be replaced with a new, modern facility as part of the development, and which currently accommodates 24 different bus services, providing good access to the town centre from the suburbs of Hinckley and the surrounding villages.

2.31 The town centre also benefits from the provision of some cycle parking, whilst the majority of Castle Street is pedestrianised which contributes to a safe and pleasant shopping environment for people on-foot.

Indicator A11: Customer and Residents' Views and Behaviour

2.32 We undertook a street-side survey of pedestrians, and a telephone household survey of residents, as part of our Hinckley and Bosworth Borough-wide Retail Capacity Study, which we completed for the Council in September 2007.

2.33 The street-side survey of pedestrians in Hinckley Town Centre was undertaken in April 2007, and involved 327 face-to-face interviews with visitors to the centre. Respondents were asked a series of questions, which were designed to ascertain views/attitudes in relation to a number of key issues.

2.34 It is notable that when asked what aspect of the town centre they liked most, the majority of respondents answered 'nothing in particular' (34 per cent), followed by 'near/convenient' (25 per cent), indicating that there are currently no key attractions in Hinckley Town Centre. Conversely, when asked about the most disliked features, it is notable that over one third of respondents cited the lack of choice of national multiple shops. A further 26 per cent of people cited the lack of choice of independent/specialist shops, whilst 17 per cent noted that the general quality of the shops in Hinckley is inadequate.

2.35 Respondents' suggested improvements for Hinckley Town Centre reflect the perceived weaknesses that were identified. Indeed, the most frequently suggested improvements were: ‘more national multiple retailers’ (30 per cent); ‘a better choice of shops in general’ (30 per cent); and ‘better quality shops’ (16 per cent). The proposed scheme will help to deliver these desired improvements, through the provision of a new food superstore and 18 additional retail units, which will provide new floorspace to meet the needs of modern retail operators (including national multiples), and will therefore help to attract better quality shops to the town centre.

2.36 The pedestrian survey also asked respondents to consider the adequacy of existing commercial leisure facilities in Hinckley. It is interesting to note that 60 per cent of respondents considered that commercial leisure facilities are inadequate in Hinckley Town Centre. With regards to specific weaknesses in the commercial leisure offer, the absence of a cinema was – by a large majority – the most common response, with 78 per cent of respondents commenting on this perceived gap in Hinckley’s leisure offer. The second most common response was the lack of bowling facilities (21 per cent). Again, the proposed scheme at the Bus Station site will address these identified deficiencies, through the provision of a five-screen cinema and a bowling alley.

Indicator A12: Perception of Safety and Occurrence of Crime

2.37 The town centre benefits from CCTV coverage and the street lighting appears to be good. There do not appear to be any ‘no-go’ backland areas, and we have not witnessed any examples of anti-social behaviour on our visits to the centre.

Indicator A13: State of Town Centre Environmental Quality

2.38 Hinckley is a reasonably busy town centre, which is spread out across a number of different shopping streets, each with a different character. The environmental quality is best along the main shopping streets, namely Castle Street, The Borough and Regent Street. Indeed, Castle Street benefits from being largely pedestrianised, with street planting, good directional signage and street furniture.

2.39 However, away from the prime shopping streets, the quality of the public realm declines. In particular, secondary areas such as Lancaster Road and Stockwell Head are less well-maintained and are predominated by uses such as car sales and repairs. Some secondary frontages look tired in places, which we suspect may be because the traders in those locations are struggling, which is also evident from the recent increase in vacant units in these areas. The application site, which is located towards the south of the town centre and is currently occupied by the bus station, the Iceland and Sainsbury’s supermarkets, and a number of low-grade uses, is in particular need of redevelopment and environmental improvement, as it is a key gateway site into the heart of the town centre.

2.40 Whilst the town centre is generally clean, with little evidence of litter or vandalism, it has few landmark buildings. The proposed mixed-use scheme at the Bus Station site will provide a high quality development, which will transform the public realm towards the south of the centre and deliver a landmark development at a gateway site.

Summary of the Retail Performance of Hinckley Town Centre

2.41 On the whole, we conclude that Hinckley is a reasonably healthy, but relatively static town centre. Indeed, although the town centre achieves a moderate level of vitality and viability (as evidenced by generally busy prime shopping streets, improving retail yields, low levels of crime, and a generally clean and pleasant shopping environment), we note that the performance of the centre has not improved since we undertook our last health check of Hinckley, in 2007. Since 2007, the centre has slipped in the national retail rankings, there has been little investment in the town centre, retail rents have remained static, and there has been a rise in the number of vacant properties in secondary locations. Whilst Hinckley has remained static, neighbouring competitor centres are improving their offer, and Hinckley faces increasing competition from Leicester, Nuneaton and out-of-centre shopping centres such as Fosse Park.

2.42 We consider, therefore, that Hinckley Town Centre is not realising its full potential, because expenditure from local residents continues to leak to destinations beyond the Borough. Moreover, we have identified a number of key deficiencies in Hinckley's retail and leisure offer, which we consider should be addressed in order to positively improve the vitality and viability of the centre, and enable it to better serve the needs of local residents.

2.43 Firstly, we note that the town centre has a limited convenience goods offer, with no food superstore to compete with the out-of-centre offer towards the north of the town. Secondly, we consider that the comparison retail offer in the centre is also in need of enhancement. Although Hinckley currently provides a reasonable number of non-food outlets, the existing shop units are typically small and out-dated, and are generally occupied by retailers that focus on the value and lower end of the market. There is thus a need for some modern retail units, to accommodate higher quality fashion outlets. Indeed, this is an improvement which was specifically identified by respondents to our 2007 street-side survey, who expressed dissatisfaction with the current range and quality of comparison outlets in Hinckley. Finally, we note that the town centre currently lacks an active evening economy. There is an under-provision of restaurants and cafes in the town centre, and an absence of family entertainment venues. As a result, footfall in the town centre currently drops off significantly outside normal shop opening hours.

2.44 The proposed development has been specifically designed to address these current deficiencies in Hinckley's retail and leisure offer. Indeed, the scheme will provide a food superstore, 18 additional retail outlets, a cinema, bowling alley, and several restaurants and cafes. Furthermore, the application site has been identified by the Council in its emerging HTCAAP as the most appropriate location in the town centre to meet the majority of the quantitative need for additional comparison and convenience floorspace in the Borough in the period up to 2021. The successful delivery of the application scheme is therefore critical, because it represents the main opportunity to substantially expand and improve the retail and commercial leisure offer in Hinckley Town Centre, and it will therefore help to enhance its vitality and viability.

APPENDIX 6

Assessment of Trade Diversion Impacts

Spreadsheet IP1	Convenience Goods Turnover and Trade Draw of Application Scheme
Spreadsheet IP2	Convenience Goods Turnover and Trade Draw of Commitments
Spreadsheet IP3	Convenience Goods Spending Patterns Across the Study Area Zones with No Development
Spreadsheet IP4	Convenience Goods Spending Patterns Across the Study Area Zones with Application Scheme
Spreadsheet IP5	Convenience Goods Spending Patterns Across the Study Area Zones with Commitments and Application Scheme
Spreadsheet IP6	Convenience Goods - Summary of Trade Impact
Spreadsheet IP7	Comparison of Turnover Estimates with the Application Scheme and Benchmark Turnover Estimates for Main Foodstores in Catchment Area
Spreadsheet IP8	Comparison Goods Turnover and Trade Draw of Application Scheme
Spreadsheet IP9	Comparison Goods Turnover and Trade Draw of Commitments
Spreadsheet IP10	Comparison Goods Spending Patterns Across the Study Area Zones with No Development
Spreadsheet IP11	Comparison Goods Spending Patterns Across the Study Area Zones with Application Scheme
Spreadsheet IP12	Comparison Goods Spending Patterns Across the Study Area Zones with Commitments and Application Scheme
Spreadsheet IP13	Comparison Goods Trade Impact of application Scheme on Spending Patterns Across the Study Area Zones

Spreadsheet IP1 - Convenience Goods Turnover and Trade Draw of Application Scheme

Convenience Goods Turnover of Application Scheme

	Application Scheme Turnover	Existing Stores Turnover (Demolitions)	Net Uplift in Turnover
	£m	£m	£m
Total Turnover 2010		9.7	
Total Turnover 2015	53.6	9.9	43.7
Total Turnover 2021	54.8	10.1	44.7

Convenience Goods Trade Draw of Application Scheme

	Zone							
	1	2	3	4	5	6	7	Total
Trade Draw of Asda, Hinckley from Each Zone (%) (from household survey)	41%	12%	0%	19%	7%	15%	7%	100%
Trade Draw of Morrisons, Hinckley from Each Zone (%) (from household survey)	39%	15%	4%	17%	11%	8%	7%	100%
Trade Draw of All Convenience Stores in Zone 1 from Each Zone (%) (from household survey)	40%	20%	1%	15%	7%	10%	7%	100%
Trade Draw of the Application Scheme from Each Zone (%)	41%	23%	11%	7%	3%	5%	10%	100%
Trade Draw of the Application Scheme from Each Zone 2015 (£m)	17.9	10.0	4.8	3.1	1.3	2.2	4.4	43.7
Trade Draw of the Application Scheme from Each Zone 2021 (£m)	18.3	10.3	4.9	3.1	1.3	2.2	4.5	44.7

Notes

(1) We have forecast the convenience goods turnover of existing stores on the site, and the application scheme, to increase by 0.46% between 2010 and 2015, and 0.37% between 2015 and 2021 to account for sales density growth. The sales density growth rates are based on our analysis of the historic relationship between sales density and expenditure growth.

(2) We have estimated the pattern of convenience goods trade draw from each zone to the application scheme based on the exisiting pattern of trade draw of Asda, Hinckley; Morrisons, Hinckley; and all conveniece stores in Zone 1, established from the results of the household survey.

(3) All monetary values are held constant at 2007 prices.

Spreadsheet IP2 - Convenience Goods Turnover and Trade Draw of Commitments

	Zone 1	2	3	4	5	6	7	Total
Redevelopment for Tesco Express, London Road, Hinckley								
Trade Draw of Other Stores, Zone 1 from Each Zone (%) (from household survey)	64%	6%	0%	0%	7%	0%	23%	100%
Trade Draw of Tesco Express from Each Zone (%)	64%	6%	0%	0%	7%	0%	23%	100%
Trade Draw of Tesco Express from Each Zone 2010 (£m)	1.2	0.1	0.0	0.0	0.1	0.0	0.5	2.0
Trade Draw of Tesco Express from Each Zone 2015 (£m)	1.3	0.1	0.0	0.0	0.1	0.0	0.5	2.0
Trade Draw of Tesco Express from Each Zone 2021 (£m)	1.3	0.1	0.0	0.0	0.1	0.0	0.5	2.1
Change to retail use, Lutterworth Road, Burbage								
Trade Draw of Convenience Stores in Burbage from Each Zone (%) (from household survey)	23%	73%	0%	0%	0%	5%	0%	100%
Trade Draw of Lutterworth Road Scheme from Each Zone (%)	23%	73%	0%	0%	0%	5%	0%	100%
Trade Draw of Lutterworth Road Scheme from Each Zone 2010 (£m)	0.3	0.8	0.0	0.0	0.0	0.1	0.0	1.1
Trade Draw of Lutterworth Road Scheme from Each Zone 2015 (£m)	0.3	0.8	0.0	0.0	0.0	0.1	0.0	1.1
Trade Draw of Lutterworth Road Scheme from Each Zone 2021 (£m)	0.3	0.8	0.0	0.0	0.0	0.1	0.0	1.2
Erection of Tesco Express, High Street, Barwell								
Trade Draw of Convenience Stores in Barwell from Each Zone (%) (from household survey)	0%	0%	0%	90%	8%	3%	0%	100%
Trade Draw of Tesco Express from Each Zone (%)	0%	0%	0%	90%	8%	3%	0%	100%
Trade Draw of Tesco Express from Each Zone 2010 (£m)	0.0	0.0	0.0	3.4	0.3	0.1	0.0	3.8
Trade Draw of Tesco Express from Each Zone 2015 (£m)	0.0	0.0	0.0	3.5	0.3	0.1	0.0	3.9
Trade Draw of Tesco Express from Each Zone 2021 (£m)	0.0	0.0	0.0	3.6	0.3	0.1	0.0	4.0
All Commitments								
Total Trade Draw From Each Zone 2010 (£m)	1.5	0.9	0.0	3.4	0.4	0.2	0.5	6.9
Total Trade Draw From Each Zone 2015 (£m)	1.5	0.9	0.0	3.5	0.4	0.2	0.5	7.0
Total Trade Draw From Each Zone 2021 (£m)	1.6	1.0	0.0	3.6	0.4	0.2	0.5	7.2

Notes

(1) We have estimated the patterns of convenience goods trade draw from each zone to the commitments for new floorspace in Hinckley, Burbage and Barwell based on the exisiting pattern of trade draw of convenience stores in: Other Stores, Zone 1 (i.e. excluding Hinckley Town Centre and large Asda, Morrisons, Tesco and Lidl supermarkets in Hinckley); Burbage; and Barwell respectively, as established from the results of the household survey.

(2) We have assumed that the convenience goods turnover of the committed schemes in the study area will increase by 0.46% between 2010 and 2015, and 0.37% between 2015 and 2021 to account for improvements in sales densities. The sales density growth rates are based on our analysis of the historic relationship between sales density and expenditure growth.

(3) All monetary values are held constant at 2007 prices.

Spreadsheet IP3 - Convenience Goods Spending Patterns Across the Study Area Zones with No Development

	Spending in 2010 Across the Study Area Zones (%)						
	1	2	3	4	5	6	7
Inside Catchment Area							
Zone 1							
Hinckley Town Centre	8%	4%	0%	2%	1%	0%	1%
Asda, Barwell Lane, Hinckley, LE10 1SS	43%	22%	0%	44%	15%	43%	12%
Morrisons, Stoke Road, Hinckley, LE10 1YA	28%	19%	5%	28%	17%	15%	8%
Tesco, Hawley Road, Hinckley, LE10 0PR	7%	29%	0%	0%	1%	0%	2%
Lidl, Hawley Road, Hinckley, LE10 0PR	1%	4%	1%	0%	0%	0%	2%
Other Stores, Zone 1	3%	1%	0%	0%	1%	0%	2%
Sub-Total Zone 1	90%	78%	6%	74%	36%	58%	26%
Zone 2							
Other Stores, Zone 2	1%	4%	1%	0%	2%	1%	1%
Sub-Total Zone 2	1%	4%	1%	0%	2%	1%	1%
Zone 3							
Somerfield, Horeston Grange, CV11 6GN	0%	0%	13%	1%	0%	0%	0%
Co-op, St Nicholas Park Estate, CV11 6DG	0%	0%	5%	0%	0%	0%	0%
Other stores, Zone 3	0%	0%	3%	0%	1%	0%	0%
Sub-Total Zone 3	0%	0%	21%	1%	1%	0%	0%
Zone 4							
Co-op, Malt Mill Bank, Barwell, LE9 8GS	0%	0%	0%	5%	1%	0%	0%
Other Stores, Barwell	0%	0%	0%	3%	0%	0%	0%
Sub-Total Zone 4	0%	0%	0%	9%	1%	0%	0%
Zone 5							
Co-op, Main Street, Market Bosworth, CV13 0JN	0%	0%	0%	0%	6%	0%	0%
Co-op Supermarket, Newbold Verdon	0%	0%	0%	0%	6%	0%	0%
Other Stores, Zone 5	0%	0%	0%	0%	6%	0%	0%
Sub-Total Zone 5	0%	0%	0%	0%	17%	0%	0%
Zone 6							
Co-op, Wood Street, Earl Shilton, LE9 7ND	0%	0%	0%	1%	1%	27%	0%
Other Stores, Earl Shilton	0%	0%	0%	0%	0%	1%	0%
Sub-Total Zone 6	0%	0%	0%	1%	1%	28%	0%
Zone 7							
Extra Foodstore, Main Street, Broughton Astley	0%	1%	0%	0%	0%	0%	17%
Other Stores, Zone 7	0%	0%	0%	0%	0%	0%	6%
Sub-Total Zone 7	0%	1%	0%	0%	0%	0%	23%
TOTAL WITHIN CATCHMENT AREA	91%	83%	28%	85%	57%	87%	49%
Outside Catchment Area							
Asda, Newtown Road, Nuneaton, CV11 4FL	3%	0%	32%	3%	0%	0%	0%
Sainsbury's, Vicarage Street, Nuneaton, CV11 4XS	1%	1%	26%	4%	1%	1%	0%
Asda, Narborough Road South, Leicester, LE3 2LL	0%	2%	0%	1%	7%	2%	20%
Morrisons, Whitwick Road, Coalville, LE67 3JN	0%	0%	0%	0%	8%	0%	0%
Tesco Express, Ryder Road, Kirby Frith, LE3 6UJ	0%	0%	0%	1%	4%	1%	1%
Other Stores, Coventry	3%	9%	7%	0%	0%	1%	1%
Other Stores, Leicester	1%	1%	0%	1%	6%	1%	6%
Other Stores, Nuneaton	0%	0%	5%	1%	1%	0%	0%
Other Stores, Outside Catchment Area	1%	1%	1%	4%	10%	2%	11%
Internet	1%	4%	0%	0%	7%	4%	13%
TOTAL OUTSIDE CATCHMENT AREA	9%	17%	72%	15%	43%	13%	51%
TOTAL	100%	100%	100%	100%	100%	100%	100%

	Spending in 2010 Across the Study Area Zones (£m)							
	1	2	3	4	5	6	7	Total
Inside Catchment Area								
Zone 1								
Hinckley Town Centre	4.5	1.3	0.0	0.6	0.3	0.0	0.2	6.8
Asda, Barwell Lane, Hinckley, LE10 1SS	25.1	7.2	0.0	11.5	4.0	9.6	4.3	61.7
Morrisons, Stoke Road, Hinckley, LE10 1YA	16.7	6.5	1.6	7.2	4.5	3.3	2.8	42.6
Tesco, Hawley Road, Hinckley, LE10 0PR	3.8	9.8	0.0	0.0	0.2	0.0	0.7	14.4
Lidl, Hawley Road, Hinckley, LE10 0PR	0.8	1.2	0.2	0.1	0.1	0.1	0.7	3.1
Other Stores, Zone 1	1.8	0.2	0.0	0.0	0.2	0.0	0.7	2.8
Sub-Total Zone 1	52.7	26.1	1.7	19.3	9.3	12.9	9.3	131.4
Zone 2								
Other Stores, Zone 2	0.4	1.2	0.4	0.0	0.5	0.1	0.2	2.9
Sub-Total Zone 2	0.4	1.2	0.4	0.0	0.5	0.1	0.2	2.9
Zone 3								
Somerfield, Horeston Grange, CV11 6GN	0.0	0.0	3.9	0.2	0.0	0.0	0.0	4.0
Co-op, St Nicholas Park Estate, CV11 6DG	0.0	0.0	1.3	0.1	0.0	0.0	0.0	1.4
Other stores, Zone 3	0.0	0.0	1.0	0.0	0.2	0.0	0.0	1.2
Sub-Total Zone 3	0.0	0.0	6.2	0.2	0.2	0.0	0.0	6.7
Zone 4								
Co-op, Malt Mill Bank, Barwell, LE9 8GS	0.0	0.0	0.0	1.4	0.2	0.1	0.0	1.7
Other Stores, Barwell	0.0	0.0	0.0	0.9	0.0	0.0	0.0	0.9
Sub-Total Zone 4	0.0	0.0	0.0	2.3	0.2	0.1	0.0	2.6
Zone 5								
Co-op, Main Street, Market Bosworth, CV13 0JN	0.0	0.0	0.0	0.0	1.6	0.0	0.0	1.6
Co-op Supermarket, Newbold Verdon	0.0	0.0	0.0	0.0	1.4	0.0	0.0	1.4
Other Stores, Zone 5	0.0	0.0	0.0	0.1	1.5	0.0	0.0	1.5
Sub-Total Zone 5	0.0	0.0	0.0	0.1	4.5	0.0	0.0	4.5
Zone 6								
Co-op, Wood Street, Earl Shilton, LE9 7ND	0.0	0.0	0.0	0.3	0.2	6.1	0.0	6.6
Other Stores, Earl Shilton	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.3
Sub-Total Zone 6	0.0	0.0	0.0	0.3	0.2	6.3	0.0	6.9
Zone 7								
Extra Foodstore, Main Street, Broughton Astley	0.0	0.3	0.0	0.0	0.0	0.0	6.1	6.5
Other Stores, Zone 7	0.0	0.1	0.0	0.0	0.0	0.1	2.1	2.2
Sub-Total Zone 7	0.0	0.4	0.0	0.0	0.0	0.1	8.2	8.7
TOTAL WITHIN CATCHMENT AREA	53.2	27.7	8.3	22.2	14.9	19.6	17.7	163.6
Outside Catchment Area								
Asda, Newtown Road, Nuneaton, CV11 4FL	1.5	0.0	9.3	0.8	0.0	0.0	0.0	11.7
Sainsbury's, Vicarage Street, Nuneaton, CV11 4XS	0.5	0.5	7.6	1.0	0.2	0.3	0.0	10.1
Asda, Narborough Road South, Leicester, LE3 2LL	0.0	0.6	0.0	0.2	1.7	0.4	7.3	10.1
Morrisons, Whitwick Road, Coalville, LE67 3JN	0.0	0.0	0.0	0.0	2.2	0.0	0.0	2.2
Tesco Express, Ryder Road, Kirby Frith, LE3 6UJ	0.2	0.0	0.0	0.2	1.0	0.2	0.2	1.9
Other Stores, Coventry	1.6	2.9	2.2	0.0	0.0	0.3	0.2	7.2
Other Stores, Leicester	0.3	0.2	0.1	0.2	1.6	0.3	2.1	4.9
Other Stores, Nuneaton	0.1	0.0	1.5	0.3	0.2	0.0	0.0	2.1
Other Stores, Outside Catchment Area	0.4	0.3	0.3	1.0	2.6	0.5	4.1	9.3
Internet	0.8	1.3	0.0	0.0	1.7	0.8	4.7	9.4
TOTAL OUTSIDE CATCHMENT AREA	5.5	5.8	21.0	3.8	11.3	2.8	18.6	68.9
TOTAL	58.7	33.6	29.3	26.0	26.2	22.4	36.3	232.5

	Spending in 2015 Across the Study Area Zones (£m)							
	1	2	3	4	5	6	7	Total
Inside Catchment Area								
Zone 1								
Hinckley Town Centre	4.8	1.4	0.0	0.6	0.3	0.0	0.3	7.4
Asda, Barwell Lane, Hinckley, LE10 1SS	27.1	7.8	0.0	12.4	4.4	10.3	4.7	66.7
Morrisons, Stoke Road, Hinckley, LE10 1YA	18.1	7.0	1.7	7.8	4.9	3.6	3.0	46.0
Tesco, Hawley Road, Hinckley, LE10 0PR	4.1	10.5	0.0	0.0	0.2	0.0	0.7	15.6
Lidl, Hawley Road, Hinckley, LE10 0PR	0.9	1.3	0.2	0.1	0.1	0.1	0.7	3.3
Other Stores, Zone 1	1.9	0.2	0.0	0.0	0.2	0.0	0.7	3.0
Sub-Total Zone 1	56.9	28.2	1.9	20.8	10.1	14.0	10.0	141.9
Zone 2								
Other Stores, Zone 2	0.5	1.3	0.4	0.0	0.6	0.1	0.2	3.1
Sub-Total Zone 2	0.5	1.3	0.4	0.0	0.6	0.1	0.2	3.1
Zone 3								
Somerfield, Horeston Grange, CV11 6GN	0.0	0.0	4.2	0.2	0.0	0.0	0.0	4.4
Co-op, St Nicholas Park Estate, CV11 6DG	0.0	0.0	1.5	0.1	0.0	0.0	0.0	1.5
Other stores, Zone 3	0.0	0.0	1.1	0.0	0.2	0.0	0.0	1.3
Sub-Total Zone 3	0.0	0.0	6.7	0.3	0.2	0.0	0.0	7.2
Zone 4								
Co-op, Malt Mill Bank, Barwell, LE9 8GS	0.0	0.0	0.0	1.5	0.2	0.1	0.0	1.8
Other Stores, Barwell	0.0	0.0	0.0	1.0	0.0	0.0	0.0	1.0
Sub-Total Zone 4	0.0	0.0	0.0	2.5	0.2	0.1	0.0	2.8
Zone 5								
Co-op, Main Street, Market Bosworth, CV13 0JN	0.0	0.0	0.0	0.0	1.7	0.0	0.0	1.7
Co-op Supermarket, Newbold Verdon	0.0	0.0	0.0	0.0	1.6	0.0	0.0	1.6
Other Stores, Zone 5	0.0	0.0	0.0	0.1	1.6	0.0	0.0	1.7
Sub-Total Zone 5	0.0	0.0	0.0	0.1	4.8	0.0	0.0	4.9
Zone 6								
Co-op, Wood Street, Earl Shilton, LE9 7ND	0.0	0.0	0.0	0.3	0.2	6.6	0.0	7.1
Other Stores, Earl Shilton	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.3
Sub-Total Zone 6	0.0	0.0	0.0	0.3	0.2	6.8	0.0	7.4
Zone 7								
Extra Foodstore, Main Street, Broughton Astley	0.0	0.4	0.0	0.0	0.0	0.0	6.6	6.9
Other Stores, Zone 7	0.0	0.1	0.0	0.0	0.0	0.1	2.2	2.4
Sub-Total Zone 7	0.0	0.4	0.0	0.0	0.0	0.1	8.8	9.3
TOTAL WITHIN CATCHMENT AREA	57.4	30.0	9.0	24.0	16.1	21.1	19.1	176.7
Outside Catchment Area								
Asda, Newtown Road, Nuneaton, CV11 4FL	1.7	0.0	10.1	0.9	0.0	0.0	0.0	12.6
Sainsbury's, Vicarage Street, Nuneaton, CV11 4XS	0.5	0.5	8.3	1.1	0.2	0.3	0.0	11.0
Asda, Narborough Road South, Leicester, LE3 2LL	0.0	0.6	0.0	0.2	1.8	0.4	7.8	10.9
Morrisons, Whitwick Road, Coalville, LE67 3JN	0.0	0.0	0.0	0.0	2.4	0.0	0.0	2.4
Tesco Express, Ryder Road, Kirby Frith, LE3 6UJ	0.3	0.0	0.0	0.3	1.1	0.2	0.2	2.0
Other Stores, Coventry	1.7	3.1	2.3	0.0	0.0	0.4	0.2	7.8
Other Stores, Leicester	0.4	0.3	0.1	0.3	1.8	0.3	2.3	5.3
Other Stores, Nuneaton	0.1	0.0	1.6	0.3	0.2	0.0	0.0	2.3
Other Stores, Outside Catchment Area	0.4	0.4	0.3	1.1	2.9	0.6	4.4	10.0
Internet	0.9	1.4	0.0	0.0	1.8	0.9	5.1	10.1
TOTAL OUTSIDE CATCHMENT AREA	6.0	6.3	22.7	4.1	12.2	3.1	20.0	74.4
TOTAL	63.4	36.2	31.7	28.1	28.3	24.2	39.1	251.0

	Spending in 2021 Across the Study Area Zones (£m)							
	1	2	3	4	5	6	7	Total
Inside Catchment Area								
Zone 1								
Hinckley Town Centre	5.2	1.5	0.0	0.7	0.3	0.0	0.3	8.0
Asda, Barwell Lane, Hinckley, LE10 1SS	29.4	8.5	0.0	13.4	4.7	11.2	5.1	72.3
Morrisons, Stoke Road, Hinckley, LE10 1YA	19.6	7.6	1.8	8.4	5.3	3.9	3.3	49.9
Tesco, Hawley Road, Hinckley, LE10 0PR	4.5	11.4	0.0	0.0	0.2	0.0	0.8	16.9
Lidl, Hawley Road, Hinckley, LE10 0PR	1.0	1.4	0.2	0.1	0.1	0.1	0.8	3.6
Other Stores, Zone 1	2.1	0.2	0.0	0.0	0.2	0.0	0.8	3.3
Sub-Total Zone 1	61.8	30.6	2.0	22.6	10.9	15.2	10.9	153.9
Zone 2								
Other Stores, Zone 2	0.5	1.4	0.5	0.0	0.6	0.2	0.3	3.4
Sub-Total Zone 2	0.5	1.4	0.5	0.0	0.6	0.2	0.3	3.4
Zone 3								
Somerfield, Horeston Grange, CV11 6GN	0.0	0.0	4.5	0.2	0.0	0.0	0.0	4.8
Co-op, St Nicholas Park Estate, CV11 6DG	0.0	0.0	1.6	0.1	0.0	0.0	0.0	1.7
Other stores, Zone 3	0.0	0.0	1.2	0.0	0.2	0.0	0.0	1.4
Sub-Total Zone 3	0.0	0.0	7.3	0.3	0.2	0.0	0.0	7.8
Zone 4								
Co-op, Malt Mill Bank, Barwell, LE9 8GS	0.0	0.0	0.0	1.6	0.2	0.1	0.0	1.9
Other Stores, Barwell	0.0	0.0	0.0	1.1	0.0	0.0	0.0	1.1
Sub-Total Zone 4	0.0	0.0	0.0	2.7	0.2	0.1	0.0	3.0
Zone 5								
Co-op, Main Street, Market Bosworth, CV13 0JN	0.0	0.0	0.0	0.0	1.8	0.0	0.0	1.8
Co-op Supermarket, Newbold Verdon	0.0	0.0	0.0	0.0	1.7	0.0	0.0	1.7
Other Stores, Zone 5	0.0	0.0	0.0	0.1	1.7	0.0	0.0	1.8
Sub-Total Zone 5	0.0	0.0	0.0	0.1	5.2	0.0	0.0	5.3
Zone 6								
Co-op, Wood Street, Earl Shilton, LE9 7ND	0.0	0.0	0.0	0.4	0.2	7.1	0.0	7.7
Other Stores, Earl Shilton	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.3
Sub-Total Zone 6	0.0	0.0	0.0	0.4	0.2	7.4	0.0	8.0
Zone 7								
Extra Foodstore, Main Street, Broughton Astley	0.0	0.4	0.0	0.0	0.0	0.0	7.1	7.5
Other Stores, Zone 7	0.0	0.1	0.0	0.0	0.0	0.1	2.4	2.6
Sub-Total Zone 7	0.0	0.5	0.0	0.0	0.0	0.1	9.6	10.1
TOTAL WITHIN CATCHMENT AREA	62.3	32.5	9.8	26.0	17.5	22.9	20.7	191.6
Outside Catchment Area								
Asda, Newtown Road, Nuneaton, CV11 4FL	1.8	0.0	11.0	1.0	0.0	0.0	0.0	13.7
Sainsbury's, Vicarage Street, Nuneaton, CV11 4XS	0.6	0.6	9.0	1.2	0.2	0.4	0.0	11.9
Asda, Narborough Road South, Leicester, LE3 2LL	0.0	0.7	0.0	0.2	2.0	0.4	8.5	11.8
Morrisons, Whitwick Road, Coalville, LE67 3JN	0.0	0.0	0.0	0.0	2.6	0.0	0.0	2.6
Tesco Express, Ryder Road, Kirby Frith, LE3 6UJ	0.3	0.0	0.0	0.3	1.1	0.2	0.3	2.2
Other Stores, Coventry	1.9	3.4	2.5	0.0	0.0	0.4	0.3	8.4
Other Stores, Leicester	0.4	0.3	0.1	0.3	1.9	0.3	2.4	5.8
Other Stores, Nuneaton	0.1	0.0	1.8	0.4	0.2	0.0	0.0	2.5
Other Stores, Outside Catchment Area	0.4	0.4	0.4	1.2	3.1	0.6	4.7	10.9
Internet	1.0	1.5	0.0	0.0	2.0	0.9	5.5	10.9
TOTAL OUTSIDE CATCHMENT AREA	6.5	6.8	24.7	4.5	13.2	3.3	21.7	80.7
TOTAL	68.8	39.3	34.4	30.5	30.7	26.2	42.4	272.3

Notes

(1) We have assumed that the pattern of spending on convenience goods in 2010 remains as identified from the 2007 telephone survey of households undertaken as part of the Hinckley and Bosworth Borough Retail Capacity Study.

(2) The Somerfield store at Hawley Road, Hinckley ceased trading in September 2008. The store was subsequently acquired by Tesco, who are now trading on the site. We do not anticipate that this change is likely to have any material impact on shopping patterns across the study area.

(3) The spending patterns in the forecast years are calculated by multiplying the total convenience goods expenditure in 2015 and 2021 by the market share at 2010. The figures in the 'Total' column are the sum of the expenditure attracted to each centre/store from each zone.

(4) All monetary values are held constant at 2007 prices.

Spreadsheet IP4 - Convenience Goods Spending Patterns Across the Study Area Zones with Application Scheme

	Hinckley Scheme Trade Draw Weighting	Application Scheme Trade Diversion 2015 (£m)									Application Scheme Trade Diversion 2021 (£m)								
		1	2	3	4	5	6	7	Total	Solus Impact	1	2	3	4	5	6	7	Total	Solus Impact
Inside Catchment Area																			
Zone 1																			
Hinckley Town Centre	0.15	0.2	0.1	0.0	0.0	0.0	0.0	0.0	0.3	-5%	0.2	0.1	0.0	0.0	0.0	0.0	0.0	0.3	-4%
Asda, Barwell Lane, Hinckley, LE10 1SS	1.00	9.1	2.7	0.0	1.6	0.4	1.2	0.9	16.0	-24%	9.3	2.8	0.0	1.7	0.4	1.3	1.0	16.4	-23%
Morrisons, Stoke Road, Hinckley, LE10 1YA	1.00	6.0	2.5	0.4	1.0	0.4	0.4	0.6	11.4	-25%	6.2	2.5	0.4	1.1	0.4	0.4	0.6	11.6	-23%
Tesco, Hawley Road, Hinckley, LE10 0PR	1.00	1.4	3.7	0.0	0.0	0.0	0.0	0.1	5.2	-34%	1.4	3.8	0.0	0.0	0.0	0.0	0.1	5.4	-32%
Lidl, Hawley Road, Hinckley, LE10 0PR	1.00	0.3	0.5	0.0	0.0	0.0	0.0	0.1	1.0	-29%	0.3	0.5	0.0	0.0	0.0	0.0	0.1	1.0	-28%
Other Stores, Zone 1	0.15	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	-4%	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	-4%
Sub-Total Zone 1		17.1	9.5	0.4	2.7	0.8	1.7	1.9	34.1		17.5	9.7	0.4	2.8	0.9	1.7	1.9	34.8	
Zone 2																			
Other Stores, Zone 2	0.15	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	-4%	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	-4%
Sub-Total Zone 2		0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1		0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	
Zone 3																			
Somerfield, Horeston Grange, CV11 6GN	0.50	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.5	-11%	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.5	-10%
Co-op, St Nicholas Park Estate, CV11 6DG	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Other stores, Zone 3	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-Total Zone 3		0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.5		0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.5	
Zone 4																			
Co-op, Malt Mill Bank, Barwell, LE9 8GS	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Other Stores, Barwell	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-Total Zone 4		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Zone 5																			
Co-op, Main Street, Market Bosworth, CV13 0JN	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Co-op Supermarket, Newbold Verdon	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Other Stores, Zone 5	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-Total Zone 5		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Zone 6																			
Co-op, Wood Street, Earl Shilton, LE9 7ND	0.50	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.4	-6%	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.4	-6%
Other Stores, Earl Shilton	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-Total Zone 6		0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.4		0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.4	
Zone 7																			
Extra Foodstore, Main Street, Broughton Astley	0.50	0.0	0.1	0.0	0.0	0.0	0.0	0.7	0.7	-11%	0.0	0.1	0.0	0.0	0.0	0.0	0.7	0.7	-10%
Other Stores, Zone 7	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-Total Zone 7		0.0	0.1	0.0	0.0	0.0	0.0	0.7	0.7		0.0	0.1	0.0	0.0	0.0	0.0	0.7	0.7	
TOTAL WITHIN CATCHMENT AREA		17.1	9.6	0.9	2.7	0.8	2.1	2.6	35.8		17.5	9.8	0.9	2.8	0.9	2.1	2.6	36.6	
Outside Catchment Area																			
Asda, Newtown Road, Nuneaton, CV11 4FL	1.00	0.6	0.0	2.2	0.1	0.0	0.0	0.0	2.8		0.6	0.0	2.2	0.1	0.0	0.0	0.0	2.9	
Sainsbury's, Vicarage Street, Nuneaton, CV11 4XS	1.00	0.2	0.2	1.8	0.1	0.0	0.0	0.0	2.3		0.2	0.2	1.8	0.1	0.0	0.0	0.0	2.4	
Asda, Narborough Road South, Leicester, LE3 2LL	1.00	0.0	0.2	0.0	0.0	0.2	0.0	1.6	2.0		0.0	0.2	0.0	0.0	0.2	0.1	1.6	2.1	
Morrisons, Whitwick Road, Coalville, LE67 3JN	1.00	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.2		0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.2	
Tesco Express, Ryder Road, Kirby Frith, LE3 6UJ	0.15	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Other Stores, Coventry	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Other Stores, Leicester	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Other Stores, Nuneaton	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Other Stores, Outside Catchment Area	0.25	0.0	0.0	0.0	0.0	0.1	0.0	0.2	0.4		0.0	0.0	0.0	0.0	0.1	0.0	0.2	0.4	
Internet	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
TOTAL OUTSIDE CATCHMENT AREA		0.8	0.4	3.9	0.3	0.5	0.1	1.8	7.9		0.8	0.4	4.0	0.3	0.5	0.1	1.9	8.1	
TOTAL		17.9	10.0	4.8	3.1	1.3	2.2	4.4	43.7		18.3	10.3	4.9	3.1	1.3	2.2	4.5	44.7	

Notes

(1) We have estimated the trade draw from existing stores/centres to the application scheme in Hinckley based on the existing market shares in 2010, with a weighting applied, which uplifts the trade draw from similar stores/centres.

(2) All monetary values are held constant at 2007 prices.

Spreadsheet IP5 - Convenience Goods Spending Patterns Across the Study Area Zones with Commitments and Application Scheme

	Commitments and Application Scheme Trade Diversion 2015 (£m)								Cumulative	Commitments and Application Scheme Trade Diversion 2021 (£m)								Cumulative
	1	2	3	4	5	6	7	Total	Impact	1	2	3	4	5	6	7	Total	Impact
Inside Catchment Area																		
Zone 1																		
Hinckley Town Centre	0.4	0.1	0.0	0.1	0.0	0.0	0.0	0.6	-8%	0.4	0.1	0.0	0.1	0.0	0.0	0.0	0.6	-7%
Asda, Barwell Lane, Hinckley, LE10 1SS	9.6	2.9	0.0	3.3	0.5	1.3	1.1	18.7	-28%	9.8	3.0	0.0	3.4	0.5	1.4	1.1	19.2	-27%
Morrisons, Stoke Road, Hinckley, LE10 1YA	6.4	2.6	0.4	2.1	0.6	0.5	0.7	13.2	-29%	6.5	2.7	0.4	2.1	0.6	0.5	0.7	13.5	-27%
Tesco, Hawley Road, Hinckley, LE10 0PR	1.5	4.1	0.0	0.0	0.0	0.0	0.2	5.8	-37%	1.6	4.2	0.0	0.0	0.0	0.0	0.2	6.0	-35%
Lidl, Hawley Road, Hinckley, LE10 0PR	0.3	0.5	0.0	0.0	0.0	0.0	0.2	1.1	-34%	0.3	0.5	0.0	0.0	0.0	0.0	0.2	1.1	-32%
Redevelopment for Tesco Express, London Road, Hinckley	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.3		0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.3	
Other Stores, Zone 1	0.2	0.0	0.0	0.0	0.0	0.0	0.1	0.3	-10%	0.2	0.0	0.0	0.0	0.0	0.0	0.1	0.3	-9%
Sub-Total Zone 1	18.6	10.3	0.4	5.5	1.2	1.8	2.3	40.0		19.0	10.5	0.4	5.6	1.2	1.9	2.4	40.9	
Zone 2																		
Change to retail use, Lutterworth Road, Burbage	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1		0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	
Other Stores, Zone 2	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.3	-8%	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.3	-8%
Sub-Total Zone 2	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.4		0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.4	
Zone 3																		
Somerfield, Horeston Grange, CV11 6GN	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.5	-11%	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.5	-10%
Co-op, St Nicholas Park Estate, CV11 6DG	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Other stores, Zone 3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-Total Zone 3	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.5		0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.5	
Zone 4																		
Tesco Express, High Street, Barwell	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Co-op, Malt Mill Bank, Barwell, LE9 8GS	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.4	-24%	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.4	-22%
Other Stores, Barwell	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.3	-27%	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.3	-25%
Sub-Total Zone 4	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.7		0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.7	
Zone 5																		
Co-op, Main Street, Market Bosworth, CV13 0JN	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Co-op Supermarket, Newbold Verdon	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Other Stores, Zone 5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-Total Zone 5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Zone 6																		
Co-op, Wood Street, Earl Shilton, LE9 7ND	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.5	-6%	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.5	-6%
Other Stores, Earl Shilton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-Total Zone 6	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.5		0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.5	
Zone 7																		
Extra Foodstore, Main Street, Broughton Astley	0.0	0.1	0.0	0.0	0.0	0.0	0.7	0.7	-11%	0.0	0.1	0.0	0.0	0.0	0.0	0.7	0.8	-10%
Other Stores, Zone 7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-Total Zone 7	0.0	0.1	0.0	0.0	0.0	0.0	0.7	0.7		0.0	0.1	0.0	0.0	0.0	0.0	0.7	0.8	
TOTAL WITHIN CATCHMENT AREA	18.6	10.5	0.9	6.2	1.3	2.2	3.0	42.7		19.1	10.8	0.9	6.3	1.3	2.3	3.1	43.7	
Outside Catchment Area																		
Asda, Newtown Road, Nuneaton, CV11 4FL	0.6	0.0	2.2	0.1	0.0	0.0	0.0	2.9		0.6	0.0	2.2	0.1	0.0	0.0	0.0	2.9	
Sainsbury's, Vicarage Street, Nuneaton, CV11 4XS	0.2	0.2	1.8	0.2	0.0	0.0	0.0	2.4		0.2	0.2	1.8	0.2	0.0	0.0	0.0	2.4	
Asda, Narborough Road South, Leicester, LE3 2LL	0.0	0.2	0.0	0.0	0.2	0.1	1.6	2.1		0.0	0.2	0.0	0.0	0.2	0.1	1.6	2.1	
Morrisons, Whitwick Road, Coalville, LE67 3JN	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.2		0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.2	
Tesco Express, Ryder Road, Kirby Frith, LE3 6UJ	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Other Stores, Coventry	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Other Stores, Leicester	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Other Stores, Nuneaton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Other Stores, Outside Catchment Area	0.0	0.0	0.0	0.0	0.1	0.0	0.2	0.4		0.0	0.0	0.0	0.0	0.1	0.0	0.2	0.4	
Internet	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
TOTAL OUTSIDE CATCHMENT AREA	0.8	0.4	3.9	0.4	0.5	0.1	1.8	8.0		0.8	0.5	4.0	0.4	0.5	0.1	1.9	8.2	
TOTAL	19.4	11.0	4.8	6.5	1.7	2.3	4.8	50.7		19.9	11.2	4.9	6.7	1.8	2.4	4.9	51.8	

Notes

(1) We have estimated the trade diversion from existing stores/centres to the committed schemes in the study area based on the existing market shares in 2010, with a weighting applied that uplifts the trade diversion from similar stores/centres (the With Commitments scenario). We have then estimated the trade diversion from existing and committed stores/centres to the application scheme in Hinckley, which are based on the market shares in 2015 under the With Commitments scenario, with a weighting applied that uplifts the trade diversion from similar stores/centres. The figures presented above represent the cumulative trade diversion of the commitments and the application scheme.

(3) All monetary values are held constant at 2007 prices.

Spreadsheet IP6 - Convenience Goods - Summary of Trade Impact

	2015					2021				
	Turnover from Study Area with No Development (£m)	Solus Diversion to Application Scheme (£m)	Cumulative Diversion to Commitments and Application Scheme (£m)	Solus Impact of Application Scheme (%)	Cumulative Impact of Commitments and Application Scheme (%)	Turnover from Study Area with No Development (£m)	Solus Diversion to Application Scheme (£m)	Cumulative Diversion to Commitments and Application Scheme (£m)	Solus Impact of Application Scheme (%)	Cumulative Impact of Commitments and Application Scheme (%)
Inside Catchment Area										
Zone 1										
Hinckley Town Centre	7.4	0.3	0.6	-5%	-8%	8.0	0.3	0.6	-4%	-7%
Sub-total for Hinckley Town Centre and Application Scheme	7.4	0.3	0.6	589%	586%	8.0	0.3	0.6	555%	552%
Asda, Barwell Lane, Hinckley, LE10 1SS	66.7	16.0	18.7	-24%	-28%	72.3	16.4	19.2	-23%	-27%
Morrisons, Stoke Road, Hinckley, LE10 1YA	46.0	11.4	13.2	-25%	-29%	49.9	11.6	13.5	-23%	-27%
Tesco, Hawley Road, Hinckley, LE10 0PR	15.6	5.2	5.8	-34%	-37%	16.9	5.4	6.0	-32%	-35%
Lidl, Hawley Road, Hinckley, LE10 0PR	3.3	1.0	1.1	-29%	-34%	3.6	1.0	1.1	-28%	-32%
Redevelopment for Tesco Express, London Road, Hinckley			0.3					0.3		
Other Stores, Zone 1	3.0	0.1	0.3	-4%	-10%	3.3	0.1	0.3	-4%	-9%
Sub-Total Zone 1	141.9	34.1	40.0	7%	4%	153.9	34.8	40.9	6%	4%
Zone 2										
Change to retail use, Lutterworth Road, Burbage			0.1					0.1		
Other Stores, Zone 2	3.1	0.1	0.3	-4%	-8%	3.4	0.1	0.3	-4%	-8%
Sub-Total Zone 2	3.1	0.1	0.4	-4%	25%	3.4	0.1	0.4	-4%	23%
Zone 3										
Somerfield, Horeston Grange, CV11 6GN	4.4	0.5	0.5	-11%	-11%	4.8	0.5	0.5	-10%	-10%
Co-op, St Nicholas Park Estate, CV11 6DG	1.5	0.0	0.0	0%	0%	1.7	0.0	0.0	0%	0%
Other stores, Zone 3	1.3	0.0	0.0	0%	0%	1.4	0.0	0.0	0%	0%
Sub-Total Zone 3	7.2	0.5	0.5	-6%	-6%	7.8	0.5	0.5	-6%	-6%
Zone 4										
Tesco Express, High Street, Barwell			0.0					0.0		
Co-op, Malt Mill Bank, Barwell, LE9 8GS	1.8	0.0	0.4	0%	-24%	1.9	0.0	0.4	0%	-22%
Other Stores, Barwell	1.0	0.0	0.3	0%	-27%	1.1	0.0	0.3	0%	-25%
Sub-Total Zone 4	2.8	0.0	0.7	0%	116%	3.0	0.0	0.7	0%	109%
Zone 5										
Co-op, Main Street, Market Bosworth, CV13 0JN	1.7	0.0	0.0	0%	0%	1.8	0.0	0.0	0%	0%
Co-op Supermarket, Newbold Verdon	1.6	0.0	0.0	0%	0%	1.7	0.0	0.0	0%	0%
Other Stores, Zone 5	1.7	0.0	0.0	0%	0%	1.8	0.0	0.0	0%	0%
Sub-Total Zone 5	4.9	0.0	0.0	0%	0%	5.3	0.0	0.0	0%	0%
Zone 6										
Co-op, Wood Street, Earl Shilton, LE9 7ND	7.1	0.4	0.5	-6%	-6%	7.7	0.4	0.5	-6%	-6%
Other Stores, Earl Shilton	0.3	0.0	0.0	0%	0%	0.3	0.0	0.0	0%	0%
Sub-Total Zone 6	7.4	0.4	0.5	-6%	-6%	8.0	0.4	0.5	-5%	-6%
Zone 7										
Extra Foodstore, Main Street, Broughton Astley	6.9	0.7	0.7	-11%	-11%	7.5	0.7	0.8	-10%	-10%
Other Stores, Zone 7	2.4	0.0	0.0	0%	0%	2.6	0.0	0.0	0%	0%
Sub-Total Zone 7	9.3	0.7	0.7	-8%	-8%	10.1	0.7	0.8	-7%	-7%
TOTAL WITHIN CATCHMENT AREA	176.7	35.8	42.7	4%	5%	191.6	36.6	43.7	4%	4%
Outside Catchment Area										
Asda, Newtown Road, Nuneaton, CV11 4FL	12.6	2.8	2.9			13.7	2.9	2.9		
Sainsbury's, Vicarage Street, Nuneaton, CV11 4XS	11.0	2.3	2.4			11.9	2.4	2.4		
Asda, Narborough Road South, Leicester, LE3 2LL	10.9	2.0	2.1			11.8	2.1	2.1		
Morrisons, Whitwick Road, Coalville, LE67 3JN	2.4	0.2	0.2			2.6	0.2	0.2		
Tesco Express, Ryder Road, Kirby Frith, LE3 6UJ	2.0	0.0	0.0			2.2	0.0	0.0		
Other Stores, Coventry	7.8	0.0	0.0			8.4	0.0	0.0		
Other Stores, Leicester	5.3	0.0	0.0			5.8	0.0	0.0		
Other Stores, Nuneaton	2.3	0.0	0.0			2.5	0.0	0.0		
Other Stores, Outside Catchment Area	10.0	0.4	0.4			10.9	0.4	0.4		
Internet	10.1	0.0	0.0			10.9	0.0	0.0		
TOTAL OUTSIDE CATCHMENT AREA	74.4	7.9	8.0			80.7	8.1	8.2		
TOTAL	251.0	43.7	50.7			272.3	44.7	51.8		

Notes
(1) The solus impact represents the turnover diversion from each centre/store in the study area to the application scheme compared to the forecast turnover of each centre/store with no development.
(2) The cumulative impact represents the combined turnover diversion from each centre/store in the study area to the commitments and the application scheme compared to the turnover of each centre/store under with no development.
(3) All monetary values are held constant at 2007 prices.

Spreadsheet IP7 - Comparison of Turnover Estimates with the Application Scheme and Benchmark Turnover Estimates for Main Foodstores in Catchment Area

	2015							2021						
Foodstore	Turnover from Study Area with No Development (£m)	Turnover from Study Area with Application Scheme (£m)	Turnover from Study Area with Commitments and Application Scheme (£m)	Benchmark Turnover (£m)	Level of Under/Over Trading With No Development (£m)	Level of Under/Over Trading with Application Scheme (£m)	Level of Under/Over Trading under with Commitments and Application Scheme (£m)	Turnover from Study Area with No Development (£m)	Turnover from Study Area with Application Scheme (£m)	Turnover from Study Area with Commitments and Application Scheme (£m)	Benchmark Turnover (£m)	Level of Under/Over Trading With No Development (£m)	Level of Under/Over Trading with Application Scheme (£m)	Level of Under/Over Trading under with Commitments and Application Scheme (£m)
Asda, Barwell Lane, Hinckley, LE10 1SS	66.7	50.6	47.9	27.5	39.2	23.2	20.4	72.3	55.9	53.1	28.1	44.2	27.8	25.1
Morrisons, Stoke Road, Hinckley, LE10 1YA	46.0	34.6	32.8	26.0	19.9	8.6	6.8	49.9	38.3	36.4	26.6	23.3	11.7	9.8
Lidl, Hawley Road, Hinckley, LE10 0PR	3.3	2.4	2.2	2.1	1.3	0.3	0.1	3.6	2.6	2.5	2.1	1.5	0.5	0.3
Somerfield, Horeston Grange, CV11 6GN	4.4	3.9	3.9	5.1	-0.7	-1.2	-1.2	4.8	4.3	4.3	5.2	-0.4	-0.9	-0.9
Co-op, Wood Street, Earl Shilton, LE9 7ND	7.1	6.7	6.7	4.5	2.6	2.1	2.1	7.7	7.3	7.3	4.6	3.1	2.6	2.6
Extra Foodstore, Main Street, Broughton Astley	6.9	6.2	6.2	3.1	3.9	3.1	3.1	7.5	6.8	6.8	3.1	4.4	3.6	3.6

Notes

(1) The Tesco store at Hawley Road, Hinckley was excluded from our benchmarking exercise. At the time of the household survey this store was trading as a Somerfield store and the turnover estimate is not representative of the Tesco store now in operation on this site.

Spreadsheet IP8 - Comparison Goods Turnover and Trade Draw of Application Scheme

Comparison Goods Turnover of Application Scheme

	pplication Scheme Turnover £m	Existing Stores Turnover (Demolitions) £m	Net Uplift in Turnover £m
Total Turnover in 2010		2.3	
Total Turnover in 2015	43.0	2.4	40.6
Total Turnover in 2021	46.3	2.6	43.7

Comparison Goods Trade Draw of Application Scheme

	Zone							
	1	2	3	4	5	6	7	Total
Trade Draw of All Comparsion Stores in Hinckley Town Centre from Each Zone (%) (from household survey)	24%	23%	1%	19%	8%	15%	9%	100%
Trade Draw of Application Scheme from Each Zone (%)	24%	23%	1%	19%	8%	15%	9%	100%
Trade Draw of Application Scheme from Each Zone in 2015 (£m)	9.9	9.2	0.5	7.6	3.3	6.1	3.8	40.6
Trade Draw of Application Scheme from Each Zone in 2021 (£m)	10.7	9.9	0.6	8.2	3.6	6.6	4.1	43.7

Notes

(1) We have forecast the comparison goods turnover of existing stores on the site, and the application scheme, to increase by 1.18% between 2010 and 2015, and 1.25% between 2015 and 2021 to account for sales density growth. The sales density growth rates are based on our analysis of the historic relationship between sales density and expenditure growth.

(2) We have estimated the pattern of comparison goods trade draw from each zone to the application scheme based on the exisiting pattern of trade draw of Hinckley Town Centre, established from the results of the household survey.

(3) All monetary values are held constant at 2007 prices.

Spreadsheet IP9 - Comparison Goods Turnover and Trade Draw of Commitments

	Zone 1	2	3	4	5	6	7	Total
Redevelopment for four retail units, Castle Street, Hinckley								
Trade Draw of Hinckley Town Centre from Each Zone (%) (from household survey)	39%	21%	1%	13%	6%	9%	10%	100%
Trade Draw of Castle Street Scheme from Each Zone (%)	39%	21%	1%	13%	6%	9%	10%	100%
Trade Draw of Castle Street Scheme from Each Zone 2010 (£m)	0.3	0.2	0.0	0.1	0.1	0.1	0.1	0.9
Trade Draw of Castle Street Scheme from Each Zone 2015 (£m)	0.4	0.2	0.0	0.1	0.1	0.1	0.1	0.9
Trade Draw of Castle Street Scheme from Each Zone 2021 (£m)	0.4	0.2	0.0	0.1	0.1	0.1	0.1	1.0
Mixed use development including retail warehousing, Jarvis Porter Site, Coventry Road, Hinckley								
Trade Draw of Hinckley Retail Park from Each Zone (%) (from household survey)	29%	11%	1%	20%	11%	18%	9%	100%
Trade Draw of All Comparison Stores in Zone 2 from Each Zone (%) (from household survey)	32%	45%	1%	4%	3%	7%	9%	100%
Trade Draw of Coventry Road Scheme from Each Zone (%)	30%	35%	1%	4%	3%	9%	18%	100%
Trade Draw of Coventry Road Scheme from Each Zone 2010 (£m)	4.0	4.7	0.1	0.5	0.4	1.2	2.4	13.3
Trade Draw of Coventry Road Scheme from Each Zone 2015 (£m)	4.2	4.9	0.1	0.6	0.4	1.3	2.5	14.1
Trade Draw of Coventry Road Scheme from Each Zone 2021 (£m)	4.6	5.3	0.2	0.6	0.5	1.4	2.7	15.2
All Commitments								
Total Trade Draw From Each Zone 2010 (£m)	4.3	4.8	0.1	0.6	0.5	1.3	2.5	14.2
Total Trade Draw From Each Zone 2015 (£m)	4.6	5.1	0.2	0.7	0.5	1.4	2.6	15.0
Total Trade Draw From Each Zone 2021 (£m)	4.9	5.5	0.2	0.7	0.5	1.5	2.8	16.2

Notes

(1) We have estimated the patterns of comparison goods trade draw from each zone to the commitments for new floorspace at Hinckley Town Centre and the Jarvis Porter Site, Hinckley based on the exisiting pattern of trade draw of comparison stores in Hinckley Town Centre for the former; and Hinckley Retail Park and All Comparison Stores in Zone 2 for the latter, as established from the results of the household survey.

(2) We have assumed that the comparison goods turnover of the committed schemes in the study area will also increase by 1.18% between 2010 and 2015, and 1.25% between 2015 and 2021 to account for improvements in sales densities. The sales density growth rates are based on our analysis of the historic relationship between sales density and expenditure growth.

(3) All monetary values are held constant at 2007 prices.

Spreadsheet IP10 - Comparison Goods Spending Patterns Across the Study Area Zones with No Development

	Spending in 2010 Across the Study Area Zones (%)						
	1	2	3	4	5	6	7
Inside Catchment Area							
Zone 1							
Hinckley Town Centre	44%	41%	2%	34%	15%	27%	17%
Hinckley Retail Park, Sword Drive, LE10 0GL	1%	1%	0%	2%	1%	2%	1%
Other Stores, Zone 1	1%	1%	0%	1%	2%	2%	1%
Sub-Total Zone 1	47%	43%	2%	36%	18%	32%	18%
Zone 2							
Burbage	1%	2%	0%	0%	0%	1%	0%
Other Stores, Zone 2	0%	0%	0%	0%	0%	0%	0%
Sub-Total Zone 2	1%	2%	0%	0%	0%	1%	0%
Zone 3							
Other Stores, Zone 3	0%	0%	0%	0%	0%	0%	0%
Sub-Total Zone 3	0%	0%	0%	0%	0%	0%	0%
Zone 4							
Other Stores, Zone 4	0%	0%	0%	1%	1%	1%	0%
Sub-Total Zone 4	0%	0%	0%	1%	1%	1%	0%
Zone 5							
Other Stores, Zone 5	0%	0%	0%	0%	2%	0%	0%
Sub-Total Zone 5	0%	0%	0%	0%	2%	0%	0%
Zone 6							
Earl Shilton	1%	0%	0%	1%	1%	5%	0%
Other Stores, Zone 6	0%	0%	0%	0%	0%	0%	0%
Sub-Total Zone 6	1%	0%	0%	1%	1%	5%	0%
Zone 7							
Other Stores, Zone 7	0%	0%	0%	0%	0%	1%	1%
Sub-Total Zone 7	0%	0%	0%	0%	0%	1%	1%
TOTAL WITHIN CATCHMENT AREA	48%	46%	3%	39%	21%	39%	20%
Outside Catchment Area							
Leicester City Centre	11%	11%	2%	13%	24%	21%	19%
Fosse Park, Fosse Park Avenue, Leicester	11%	13%	4%	12%	19%	13%	36%
Nuneaton Town Centre	9%	7%	48%	13%	3%	3%	1%
Coventry City Centre	2%	2%	8%	1%	0%	2%	1%
Coalville Town Centre	0%	0%	0%	0%	6%	1%	0%
Birmingham City Centre	1%	1%	3%	1%	0%	1%	1%
Rugby Town Centre	0%	1%	1%	0%	0%	0%	2%
Focus, Weadington Road, Nuneaton, CV10 0AD	0%	0%	5%	0%	0%	0%	0%
B&Q, Brandon Road, Binley Woods, CV3 2JD	0%	1%	2%	0%	0%	0%	1%
Currys, Bond Street, Nuneaton, CV11 4FX	1%	0%	2%	0%	0%	0%	0%
Other Stores, Outside Catchment	8%	9%	16%	14%	14%	9%	12%
Internet / mail order / catalogue	8%	9%	7%	6%	12%	11%	8%
TOTAL OUTSIDE CATCHMENT AREA	52%	54%	97%	61%	79%	61%	80%
TOTAL	100%	100%	100%	100%	100%	100%	100%

	Spending in 2010 Across the Study Area Zones (£m)							
	1	2	3	4	5	6	7	Total
Inside Catchment Area								
Zone 1								
Hinckley Town Centre	45.3	24.3	1.2	15.5	7.0	10.5	11.4	115.2
Hinckley Retail Park, Sword Drive, LE10 0GL	1.4	0.5	0.0	0.9	0.5	0.9	0.4	4.7
Other Stores, Zone 1	1.2	0.7	0.0	0.3	0.7	0.8	0.5	4.2
Sub-Total Zone 1	47.9	25.5	1.3	16.7	8.2	12.2	12.3	124.0
Zone 2								
Burbage	1.0	1.4	0.0	0.1	0.1	0.2	0.3	3.1
Other Stores, Zone 2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-Total Zone 2	1.0	1.4	0.0	0.1	0.1	0.2	0.3	3.1
Zone 3								
Other Stores, Zone 3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-Total Zone 3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 4								
Other Stores, Zone 4	0.2	0.1	0.0	0.4	0.3	0.3	0.0	1.3
Sub-Total Zone 4	0.2	0.1	0.0	0.4	0.3	0.3	0.0	1.3
Zone 5								
Other Stores, Zone 5	0.0	0.1	0.0	0.0	0.8	0.1	0.0	1.0
Sub-Total Zone 5	0.0	0.1	0.0	0.0	0.8	0.1	0.0	1.0
Zone 6								
Earl Shilton	0.5	0.1	0.0	0.4	0.3	1.9	0.1	3.4
Other Stores, Zone 6	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1
Sub-Total Zone 6	0.5	0.1	0.0	0.4	0.3	1.9	0.1	3.5
Zone 7								
Other Stores, Zone 7	0.0	0.0	0.0	0.1	0.0	0.3	0.8	1.2
Sub-Total Zone 7	0.0	0.0	0.0	0.1	0.0	0.3	0.8	1.2
TOTAL WITHIN CATCHMENT AREA	49.6	27.2	1.3	17.8	9.7	14.9	13.5	134.1
Outside Catchment Area								
Leicester City Centre	11.5	6.8	1.1	5.9	11.3	8.1	12.3	57.1
Fosse Park, Fosse Park Avenue, Leicester	11.1	7.6	2.0	5.3	9.1	4.9	23.6	63.6
Nuneaton Town Centre	9.1	4.4	24.6	6.2	1.4	1.3	0.8	47.8
Coventry City Centre	2.1	1.4	3.9	0.4	0.0	0.9	0.7	9.4
Coalville Town Centre	0.0	0.0	0.2	0.1	2.7	0.2	0.0	3.2
Birmingham City Centre	1.4	0.7	1.4	0.6	0.0	0.3	0.7	5.1
Rugby Town Centre	0.5	0.3	0.3	0.2	0.0	0.0	1.4	2.7
Focus, Weadington Road, Nuneaton, CV10 0AD	0.1	0.1	2.5	0.1	0.1	0.0	0.1	2.9
B&Q, Brandon Road, Binley Woods, CV3 2JD	0.4	0.8	1.1	0.1	0.2	0.0	0.5	3.0
Currys, Bond Street, Nuneaton, CV11 4FX	0.7	0.0	1.1	0.1	0.1	0.0	0.0	1.9
Other Stores, Outside Catchment	8.6	5.1	8.0	6.3	6.6	3.6	7.8	46.0
Internet / mail order / catalogue	7.8	5.3	3.4	2.8	5.7	4.3	5.1	34.4
TOTAL OUTSIDE CATCHMENT AREA	53.3	32.3	49.5	28.1	37.2	23.6	53.1	277.1
TOTAL	102.9	59.6	50.8	45.9	46.9	38.5	66.5	411.2

	Spending in 2015 Across the Study Area Zones (£m)							
	1	2	3	4	5	6	7	Total
Inside Catchment Area								
Zone 1								
Hinckley Town Centre	54.3	29.1	1.4	18.5	8.4	12.6	13.5	137.9
Hinckley Retail Park, Sword Drive, LE10 0GL	1.6	0.6	0.1	1.1	0.6	1.0	0.5	5.6
Other Stores, Zone 1	1.4	0.8	0.0	0.3	0.9	0.9	0.6	5.0
Sub-Total Zone 1	57.3	30.6	1.5	20.0	9.9	14.6	14.6	148.4
Zone 2								
Burbage	1.2	1.7	0.0	0.1	0.1	0.3	0.3	3.7
Other Stores, Zone 2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-Total Zone 2	1.2	1.7	0.0	0.1	0.1	0.3	0.3	3.7
Zone 3								
Other Stores, Zone 3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-Total Zone 3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 4								
Other Stores, Zone 4	0.2	0.1	0.0	0.5	0.3	0.3	0.0	1.6
Sub-Total Zone 4	0.2	0.1	0.0	0.5	0.3	0.3	0.0	1.6
Zone 5								
Other Stores, Zone 5	0.0	0.1	0.0	0.0	1.0	0.1	0.0	1.2
Sub-Total Zone 5	0.0	0.1	0.0	0.0	1.0	0.1	0.0	1.2
Zone 6								
Earl Shilton	0.7	0.1	0.0	0.5	0.4	2.3	0.1	4.1
Other Stores, Zone 6	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1
Sub-Total Zone 6	0.7	0.1	0.0	0.5	0.4	2.3	0.1	4.1
Zone 7								
Other Stores, Zone 7	0.0	0.0	0.0	0.1	0.0	0.3	0.9	1.4
Sub-Total Zone 7	0.0	0.0	0.0	0.1	0.0	0.3	0.9	1.4
TOTAL WITHIN CATCHMENT AREA	59.4	32.6	1.6	21.3	11.7	17.8	16.0	160.4
Outside Catchment Area								
Leicester City Centre	13.8	8.1	1.4	7.1	13.6	9.7	14.7	68.3
Fosse Park, Fosse Park Avenue, Leicester	13.2	9.1	2.4	6.4	10.9	5.9	28.2	76.0
Nuneaton Town Centre	10.9	5.3	29.4	7.4	1.7	1.6	1.0	57.3
Coventry City Centre	2.6	1.6	4.7	0.5	0.0	1.1	0.8	11.3
Coalville Town Centre	0.0	0.0	0.2	0.1	3.2	0.3	0.0	3.8
Birmingham City Centre	1.7	0.8	1.7	0.7	0.0	0.3	0.8	6.1
Rugby Town Centre	0.5	0.4	0.3	0.2	0.0	0.0	1.7	3.2
Focus, Weadington Road, Nuneaton, CV10 0AD	0.2	0.1	2.9	0.1	0.1	0.0	0.1	3.5
B&Q, Brandon Road, Binley Woods, CV3 2JD	0.4	0.9	1.3	0.1	0.2	0.0	0.6	3.6
Currys, Bond Street, Nuneaton, CV11 4FX	0.8	0.0	1.3	0.1	0.1	0.0	0.0	2.3
Other Stores, Outside Catchment	10.3	6.1	9.5	7.5	7.9	4.3	9.3	55.0
Internet / mail order / catalogue	9.3	6.3	4.1	3.4	6.9	5.1	6.1	41.2
TOTAL OUTSIDE CATCHMENT AREA	63.8	38.7	59.3	33.6	44.5	28.3	63.3	331.5
TOTAL	123.2	71.3	60.8	54.9	56.2	46.1	79.3	491.9

	Spending in 2021 Across the Study Area Zones (£m)							
	1	2	3	4	5	6	7	Total
Inside Catchment Area								
Zone 1								
Hinckley Town Centre	68.2	36.6	1.8	23.3	10.5	15.8	17.0	173.1
Hinckley Retail Park, Sword Drive, LE10 0GL	2.0	0.8	0.1	1.4	0.8	1.3	0.6	7.0
Other Stores, Zone 1	1.8	1.0	0.0	0.4	1.1	1.2	0.8	6.2
Sub-Total Zone 1	72.0	38.4	1.9	25.1	12.4	18.3	18.4	186.4
Zone 2								
Burbage	1.5	2.1	0.0	0.2	0.1	0.3	0.4	4.6
Other Stores, Zone 2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-Total Zone 2	1.5	2.1	0.0	0.2	0.1	0.3	0.4	4.6
Zone 3								
Other Stores, Zone 3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-Total Zone 3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 4								
Other Stores, Zone 4	0.3	0.2	0.0	0.6	0.4	0.4	0.1	2.0
Sub-Total Zone 4	0.3	0.2	0.0	0.6	0.4	0.4	0.1	2.0
Zone 5								
Other Stores, Zone 5	0.0	0.1	0.1	0.0	1.2	0.1	0.0	1.5
Sub-Total Zone 5	0.0	0.1	0.1	0.0	1.2	0.1	0.0	1.5
Zone 6								
Earl Shilton	0.8	0.2	0.0	0.7	0.4	2.9	0.1	5.1
Other Stores, Zone 6	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1
Sub-Total Zone 6	0.8	0.2	0.0	0.7	0.5	2.9	0.1	5.2
Zone 7								
Other Stores, Zone 7	0.0	0.1	0.0	0.2	0.0	0.4	1.2	1.8
Sub-Total Zone 7	0.0	0.1	0.0	0.2	0.0	0.4	1.2	1.8
TOTAL WITHIN CATCHMENT AREA	74.6	40.9	2.0	26.7	14.7	22.4	20.1	201.4
Outside Catchment Area								
Leicester City Centre	17.3	10.2	1.7	8.9	17.0	12.2	18.4	85.7
Fosse Park, Fosse Park Avenue, Leicester	16.6	11.4	3.0	8.0	13.6	7.4	35.4	95.4
Nuneaton Town Centre	13.7	6.6	37.0	9.3	2.1	2.0	1.2	71.9
Coventry City Centre	3.2	2.1	5.9	0.6	0.0	1.4	1.0	14.2
Coalville Town Centre	0.1	0.0	0.3	0.1	4.0	0.3	0.0	4.8
Birmingham City Centre	2.1	1.0	2.2	0.9	0.0	0.4	1.0	7.6
Rugby Town Centre	0.7	0.5	0.4	0.3	0.0	0.0	2.2	4.0
Focus, Weadington Road, Nuneaton, CV10 0AD	0.2	0.1	3.7	0.2	0.1	0.0	0.1	4.4
B&Q, Brandon Road, Binley Woods, CV3 2JD	0.6	1.1	1.7	0.2	0.2	0.0	0.8	4.5
Currys, Bond Street, Nuneaton, CV11 4FX	1.0	0.1	1.6	0.1	0.1	0.0	0.0	2.9
Other Stores, Outside Catchment	12.9	7.7	12.0	9.4	10.0	5.5	11.7	69.1
Internet / mail order / catalogue	11.7	7.9	5.1	4.2	8.6	6.5	7.6	51.8
TOTAL OUTSIDE CATCHMENT AREA	80.1	48.6	74.5	42.2	55.9	35.5	79.4	416.3
TOTAL	154.7	89.5	76.5	69.0	70.5	57.9	99.6	617.7

Notes

(1) We have assumed that the pattern of spending on comparison goods in 2010 remains as identified from the 2007 telephone survey of households undertaken as part of the Hinckley and Bosworth Borough Retail Capacity Study.

(2) The spending patterns in the forecast years are calculated by multiplying the total comparison goods expenditure in 2015 and 2021 by the market share at 2010. The figures in the 'Total' column are the sum of the expenditure attracted to each centre/store from each zone.

(3) All monetary values are held constant at 2007 prices.

Spreadsheet IP11 - Comparison Goods Spending Patterns Across the Study Area Zones with Application Scheme

	Application Scheme Trade Draw Weighting	Application Scheme Trade Diversion 2015 (£m)									Application Scheme Trade Diversion 2021 (£m)								
		1	2	3	4	5	6	7	Total	Solus Impact	1	2	3	4	5	6	7	Total	Solus Impact
Inside Catchment Area																			
Zone 1																			
Hinckley Town Centre	0.75	4.4	3.9	0.0	2.6	0.5	1.8	0.6	13.9	-10%	4.8	4.2	0.0	2.8	0.6	2.0	0.7	15.0	-9%
Hinckley Retail Park, Sword Drive, LE10 0GL	0.75	0.1	0.1	0.0	0.2	0.0	0.1	0.0	0.6	-10%	0.1	0.1	0.0	0.2	0.0	0.2	0.0	0.6	-9%
Other Stores, Zone 1	0.25	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	-3%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	-3%
Sub-Total Zone 1		4.6	4.0	0.0	2.7	0.6	2.0	0.7	14.7		5.0	4.4	0.0	2.9	0.6	2.2	0.7	15.8	
Zone 2																			
Burbage	0.20	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	-3%	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	-2%
Other Stores, Zone 2	0.20	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-Total Zone 2		0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1		0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	
Zone 3																			
Other Stores, Zone 3	0.20	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-Total Zone 3		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Zone 4																			
Other Stores, Zone 4	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-Total Zone 4		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Zone 5																			
Other Stores, Zone 5	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-Total Zone 5		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Zone 6																			
Earl Shilton	0.20	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1	-3%	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1	-3%
Other Stores, Zone 6	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-Total Zone 6		0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1		0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1	
Zone 7																			
Other Stores, Zone 7	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-Total Zone 7		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
TOTAL WITHIN CATCHMENT AREA		4.7	4.1	0.0	2.8	0.6	2.1	0.7	14.9		5.0	4.4	0.0	3.0	0.6	2.3	0.7	16.0	
Outside Catchment Area																			
Leicester City Centre	1.00	1.5	1.5	0.0	1.3	1.1	1.9	0.9	8.2		1.6	1.6	0.0	1.4	1.2	2.0	1.0	8.8	
Fosse Park, Fosse Park Avenue, Leicester	1.00	1.4	1.6	0.0	1.2	0.9	1.1	1.7	8.0		1.6	1.8	0.0	1.3	1.0	1.2	1.9	8.7	
Nuneaton Town Centre	1.00	1.2	0.9	0.3	1.4	0.1	0.3	0.1	4.3		1.3	1.0	0.4	1.5	0.2	0.3	0.1	4.7	
Coventry City Centre	1.00	0.3	0.3	0.1	0.1	0.0	0.2	0.0	1.0		0.3	0.3	0.1	0.1	0.0	0.2	0.1	1.1	
Coalville Town Centre	1.00	0.0	0.0	0.0	0.0	0.3	0.1	0.0	0.3		0.0	0.0	0.0	0.0	0.3	0.1	0.0	0.4	
Birmingham City Centre	1.00	0.2	0.1	0.0	0.1	0.0	0.1	0.0	0.6		0.2	0.2	0.0	0.1	0.0	0.1	0.1	0.6	
Rugby Town Centre	1.00	0.1	0.1	0.0	0.0	0.0	0.0	0.1	0.3		0.1	0.1	0.0	0.0	0.0	0.0	0.1	0.3	
Focus, Weadington Road, Nuneaton, CV10 0AD	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
B&Q, Brandon Road, Binley Woods, CV3 2JD	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Currys, Bond Street, Nuneaton, CV11 4FX	0.20	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Other Stores, Outside Catchment	0.50	0.6	0.5	0.1	0.7	0.3	0.4	0.3	2.9		0.6	0.6	0.1	0.7	0.4	0.5	0.3	3.1	
Internet / mail order / catalogue	0.00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
TOTAL OUTSIDE CATCHMENT AREA		5.3	5.1	0.5	4.8	2.8	4.0	3.2	25.7		5.7	5.5	0.6	5.2	3.0	4.3	3.4	27.6	
TOTAL		9.9	9.2	0.5	7.6	3.3	6.1	3.8	40.6		10.7	9.9	0.6	8.2	3.6	6.6	4.1	43.7	

Notes

(1) We have estimated the trade draw from existing stores/centres to the application scheme in Hinckley based on the existing market shares in 2010, with a weighting applied, which uplifts the trade draw from similar stores/centres.

(2) The patterns of trade diversion in the forecast years under the With Application Scheme scenario are calculated by multiplying the trade draw of the application scheme from each zone in 2015 and 2021 (calculated in Spreadsheet IP1) by the estimated pattern of trade draw from each centre/store. The figures in the 'Total' column are the sum of the expenditure diverted from each centre/store to the application scheme.

(3) All monetary values are held constant at 2007 prices.

Spreadsheet IP12 - Comparison Goods Spending Patterns Across the Study Area Zones with Commitments and Application Scheme

	Commitments and Application Scheme Trade Diversion 2015 (£m)									Commitments and Application Scheme Trade Diversion 2021 (£m)								
	1	2	3	4	5	6	7	Total	Cumulative Impact	1	2	3	4	5	6	7	Total	Cumulative Impact
Inside Catchment Area																		
Zone 1																		
Hinckley Town Centre	6.8	6.4	0.0	2.8	0.6	2.3	1.2	20.2	-15%	7.3	6.9	0.0	3.1	0.7	2.5	1.3	21.7	-13%
Four retail units, Castle Street, Hinckley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	
Hinckley Retail Park, Sword Drive, LE10 0GL	0.2	0.1	0.0	0.2	0.0	0.2	0.0	0.8	-14%	0.2	0.1	0.0	0.2	0.0	0.2	0.0	0.9	-12%
Other Stores, Zone 1	0.1	0.1	0.0	0.0	0.0	0.1	0.0	0.2	-4%	0.1	0.1	0.0	0.0	0.0	0.1	0.0	0.2	-4%
Sub-Total Zone 1	7.1	6.6	0.0	3.1	0.7	2.5	1.2	21.3		7.7	7.2	0.0	3.3	0.7	2.7	1.3	22.9	
Zone 2																		
Mixed use development, Jarvis Porter Site, Coventry Road, Hinckley	0.1	0.2	0.0	0.0	0.0	0.1	0.0	0.4		0.1	0.2	0.0	0.0	0.0	0.1	0.0	0.4	
Burbage	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.2	-4%	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.2	-4%
Other Stores, Zone 2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-Total Zone 2	0.1	0.3	0.0	0.0	0.0	0.1	0.0	0.6		0.1	0.3	0.0	0.0	0.0	0.1	0.0	0.6	
Zone 3																		
Other Stores, Zone 3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-Total Zone 3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Zone 4																		
Other Stores, Zone 4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-1%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-1%
Sub-Total Zone 4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Zone 5																		
Other Stores, Zone 5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-Total Zone 5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Zone 6																		
Earl Shilton	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.2	-4%	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.2	-4%
Other Stores, Zone 6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-Total Zone 6	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.2		0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.2	
Zone 7																		
Other Stores, Zone 7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-1%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-1%
Sub-Total Zone 7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
TOTAL WITHIN CATCHMENT AREA	7.3	6.9	0.0	3.1	0.7	2.7	1.3	22.0		7.8	7.5	0.0	3.3	0.8	2.9	1.4	23.7	
Outside Catchment Area																		
Leicester City Centre	2.1	2.1	0.0	1.4	1.3	2.2	1.5	10.7		2.3	2.3	0.0	1.5	1.4	2.4	1.6	11.5	
Fosse Park, Fosse Park Avenue, Leicester	2.0	2.4	0.0	1.3	1.0	1.3	2.9	11.0		2.2	2.6	0.0	1.4	1.1	1.4	3.1	11.8	
Nuneaton Town Centre	1.7	1.4	0.4	1.5	0.2	0.4	0.1	5.6		1.8	1.5	0.5	1.6	0.2	0.4	0.1	6.0	
Coventry City Centre	0.4	0.4	0.1	0.1	0.0	0.3	0.1	1.3		0.4	0.5	0.1	0.1	0.0	0.3	0.1	1.4	
Coalville Town Centre	0.0	0.0	0.0	0.0	0.3	0.1	0.0	0.4		0.0	0.0	0.0	0.0	0.3	0.1	0.0	0.4	
Birmingham City Centre	0.3	0.2	0.0	0.1	0.0	0.1	0.1	0.8		0.3	0.2	0.0	0.2	0.0	0.1	0.1	0.9	
Rugby Town Centre	0.1	0.1	0.0	0.0	0.0	0.0	0.2	0.4		0.1	0.1	0.0	0.0	0.0	0.0	0.2	0.4	
Focus, Weadington Road, Nuneaton, CV10 0AD	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
B&Q, Brandon Road, Binley Woods, CV3 2JD	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	
Currys, Bond Street, Nuneaton, CV11 4FX	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	
Other Stores, Outside Catchment	0.7	0.7	0.1	0.7	0.3	0.5	0.4	3.3		0.7	0.7	0.1	0.8	0.4	0.5	0.4	3.6	
Internet / mail order / catalogue	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
TOTAL OUTSIDE CATCHMENT AREA	7.2	7.4	0.7	5.2	3.1	4.8	5.2	33.5		7.8	8.0	0.7	5.6	3.4	5.1	5.6	36.1	
TOTAL	14.5	14.3	0.7	8.3	3.8	7.5	6.5	55.6		15.6	15.4	0.7	8.9	4.1	8.1	7.0	59.9	

Notes

(1) We have estimated the trade diversion from existing stores/centres to the committed schemes in the study area based on the existing market shares in 2010, with a weighting applied that uplifts the trade diversion from similar stores/centres (the With Commitments scenario). We have then estimated the trade diversion from existing and committed stores/centres to the application scheme in Hinckley, which are based on the market shares in 2015 under the With Commitments scenario, with a weighting applied that uplifts the trade diversion from similar stores/centres. The figures presented above represent the cumulative trade diversion of the commitments and the application scheme.

(3) All monetary values are held constant at 2007 prices.

Spreadsheet IP13 - Comparison Goods Trade Impact of Application Scheme on Spending Patterns Across the Study Area Zones

	2015 Turnover from Study Area with No Development (£m)	2015 Solus Diversion to Application Scheme (£m)	2015 Cumulative Diversion to Commitments and Application Scheme (£m)	2015 Solus Impact of Application Scheme (%)	2015 Cumulative Impact of Commitments and Application Scheme (%)	2021 Turnover from Study Area with No Development (£m)	2021 Solus Diversion to Application Scheme (£m)	2021 Cumulative Diversion to Commitments and Application Scheme (£m)	2021 Solus Impact of Application Scheme (%)	2021 Cumulative Impact of Commitments and Application Scheme (%)
Inside Catchment Area										
Zone 1										
Hinckley Town Centre	137.9	13.9	20.2	-10%	-15%	173.1	15.0	21.7	-9%	-13%
Four retail units, Castle Street, Hinckley			0.1					0.1		
Sub-total for Hinckley Town Centre, 4 Retail Units and Application Scheme	137.9	13.9	20.3	19%	15%	173.1	15.0	21.9	17%	13%
Hinckley Retail Park, Sword Drive, LE10 0GL	5.6	0.6	0.8	-10%	-14%	7.0	0.6	0.9	-9%	-12%
Other Stores, Zone 1	5.0	0.2	0.2	-3%	-4%	6.2	0.2	0.2	-3%	-4%
Sub-Total Zone 1	148.4	14.7	21.3	17%	14%	186.4	15.8	22.9	15%	12%
Zone 2										
Mixed use development, Jarvis Porter Site, Coventry Road, Hinckley			0.4					0.4		
Burbage	3.7	0.1	0.2	-3%	-4%	4.6	0.1	0.2	-2%	-4%
Other Stores, Zone 2	0.0	0.0	0.0	0%	0%	0.0	0.0	0.0	0%	0%
Sub-Total Zone 2	3.7	0.1	0.6	-3%	368%	4.6	0.1	0.6	-2%	316%
Zone 3										
Other Stores, Zone 3	0.0	0.0	0.0	0%	0%	0.0	0.0	0.0	0%	0%
Sub-Total Zone 3	0.0	0.0	0.0	0%	0%	0.0	0.0	0.0	0%	0%
Zone 4										
Other Stores, Zone 4	1.6	0.0	0.0	0%	-1%	2.0	0.0	0.0	0%	-1%
Sub-Total Zone 4	1.6	0.0	0.0	0%	-1%	2.0	0.0	0.0	0%	-1%
Zone 5										
Other Stores, Zone 5	1.2	0.0	0.0	0%	0%	1.5	0.0	0.0	0%	0%
Sub-Total Zone 5	1.2	0.0	0.0	0%	0%	1.5	0.0	0.0	0%	0%
Zone 6										
Earl Shilton	4.1	0.1	0.2	-3%	-4%	5.1	0.1	0.2	-3%	-4%
Other Stores, Zone 6	0.1	0.0	0.0	0%	0%	0.1	0.0	0.0	0%	0%
Sub-Total Zone 6	4.1	0.1	0.2	-3%	-4%	5.2	0.1	0.2	-3%	-3%
Zone 7										
Other Stores, Zone 7	1.4	0.0	0.0	0%	-1%	1.8	0.0	0.0	0%	-1%
Sub-Total Zone 7	1.4	0.0	0.0	0%	-1%	1.8	0.0	0.0	0%	-1%
TOTAL WITHIN CATCHMENT AREA	160.4	14.9	22.0	16%	21%	201.4	16.0	23.7	14%	18%
Outside Catchment Area										
Leicester City Centre	68.3	8.2	10.7			85.7	8.8	11.5		
Fosse Park, Fosse Park Avenue, Leicester	76.0	8.0	11.0			95.4	8.7	11.8		
Nuneaton Town Centre	57.3	4.3	5.6			71.9	4.7	6.0		
Coventry City Centre	11.3	1.0	1.3			14.2	1.1	1.4		
Coalville Town Centre	3.8	0.3	0.4			4.8	0.4	0.4		
Birmingham City Centre	6.1	0.6	0.8			7.6	0.6	0.9		
Rugby Town Centre	3.2	0.3	0.4			4.0	0.3	0.4		
Focus, Weadington Road, Nuneaton, CV10 0AD	3.5	0.0	0.0			4.4	0.0	0.0		
B&Q, Brandon Road, Binley Woods, CV3 2JD	3.6	0.0	0.1			4.5	0.0	0.1		
Currys, Bond Street, Nuneaton, CV11 4FX	2.3	0.0	0.1			2.9	0.0	0.1		
Other Stores, Outside Catchment	55.0	2.9	3.3			69.1	3.1	3.6		
Internet / mail order / catalogue	41.2	0.0	0.0			51.8	0.0	0.0		
TOTAL OUTSIDE CATCHMENT AREA	331.5	25.7	33.5	-8%	-10%	416.3	27.6	36.1	-7%	-9%
TOTAL	491.9	40.6	55.6	0%	0%	617.7	43.7	59.9	0%	0%

Notes

(1) The Solus Impact of the Application Scheme is calculated as the turnover diversion from each centre/store in the study area to the application scheme under the With Scheme scenario as a percentage of the turnover of each centre/store under the No Development scenario.

(2) The Cumulative Impact of the Application Scheme is calculated as the turnover diversion from each centre/store in the study area to the application scheme under the With Commitments and Scheme scenario as a percentage of the turnover of each centre/store under the No Development scenario.

(3) All monetary values are held constant at 2007 prices.