

Hinckley & Bosworth Town and District Centres Study

Volume 2 — Plans & Appendices February 2017



on behalf of



Hinckley & Bosworth
Borough Council



gva.co.uk/planning

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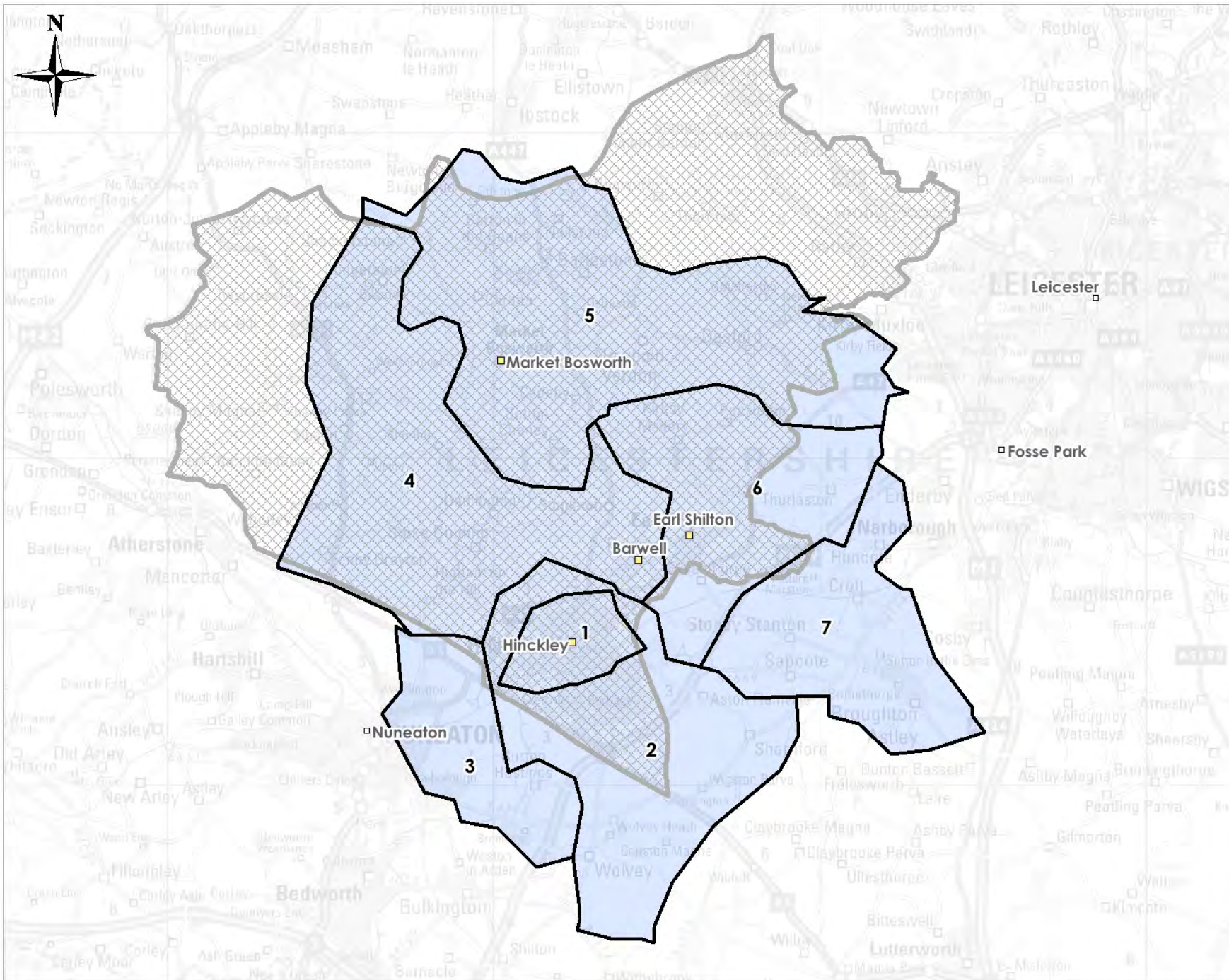
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For and on behalf of GVA Grimley Ltd



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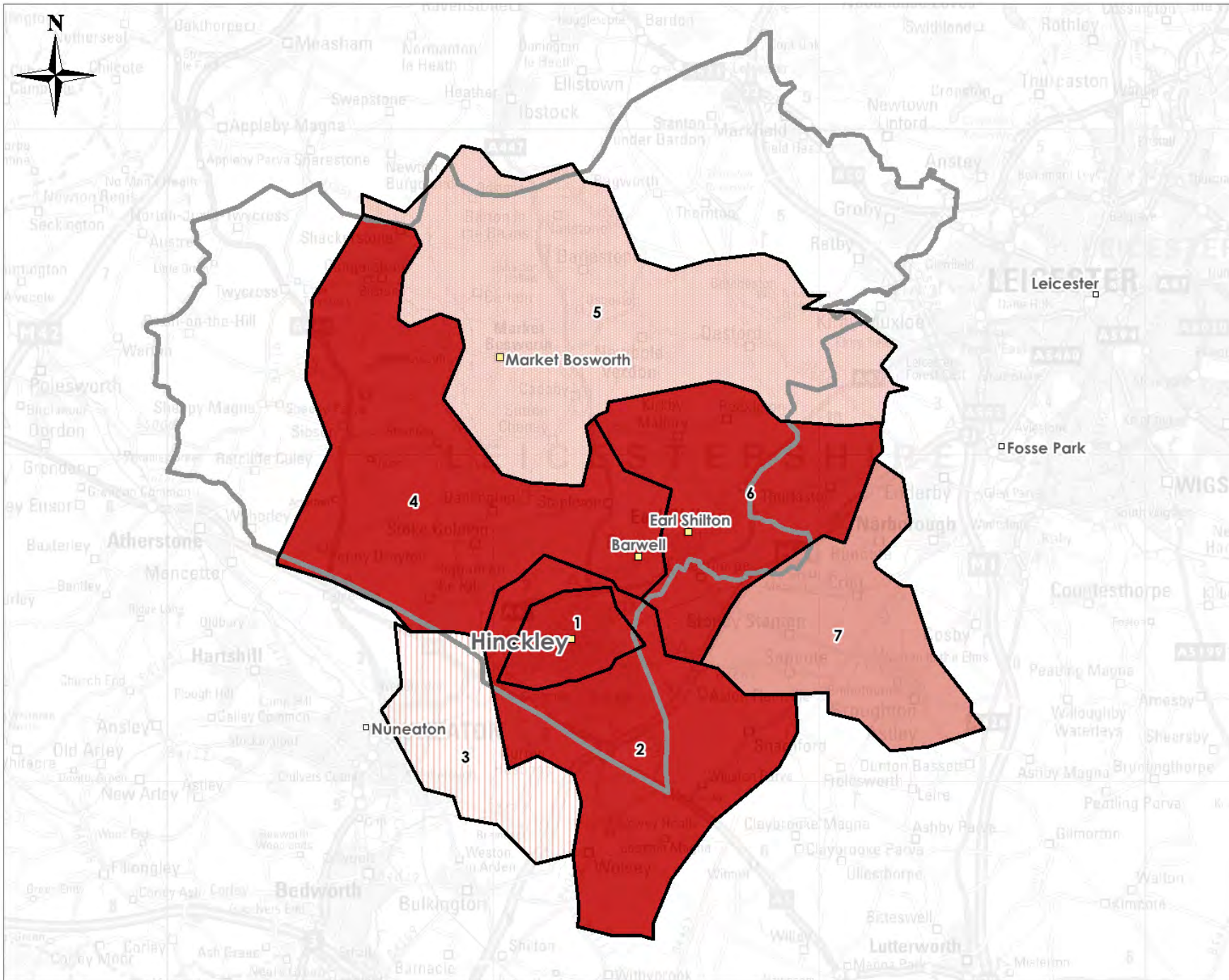
Key

-  Hinckley & Bosworth
-  Study Area
-  Survey Zone

Zone Postal Sectors

- 1 LE10 0/1
- 2 LE10 2/3
- 3 CV11 6
- 4 LE9 8, CV13 6
- 5 LE9 9, CV13 0
- 6 LE9 7
- 7 LE9 3/4/6

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Key

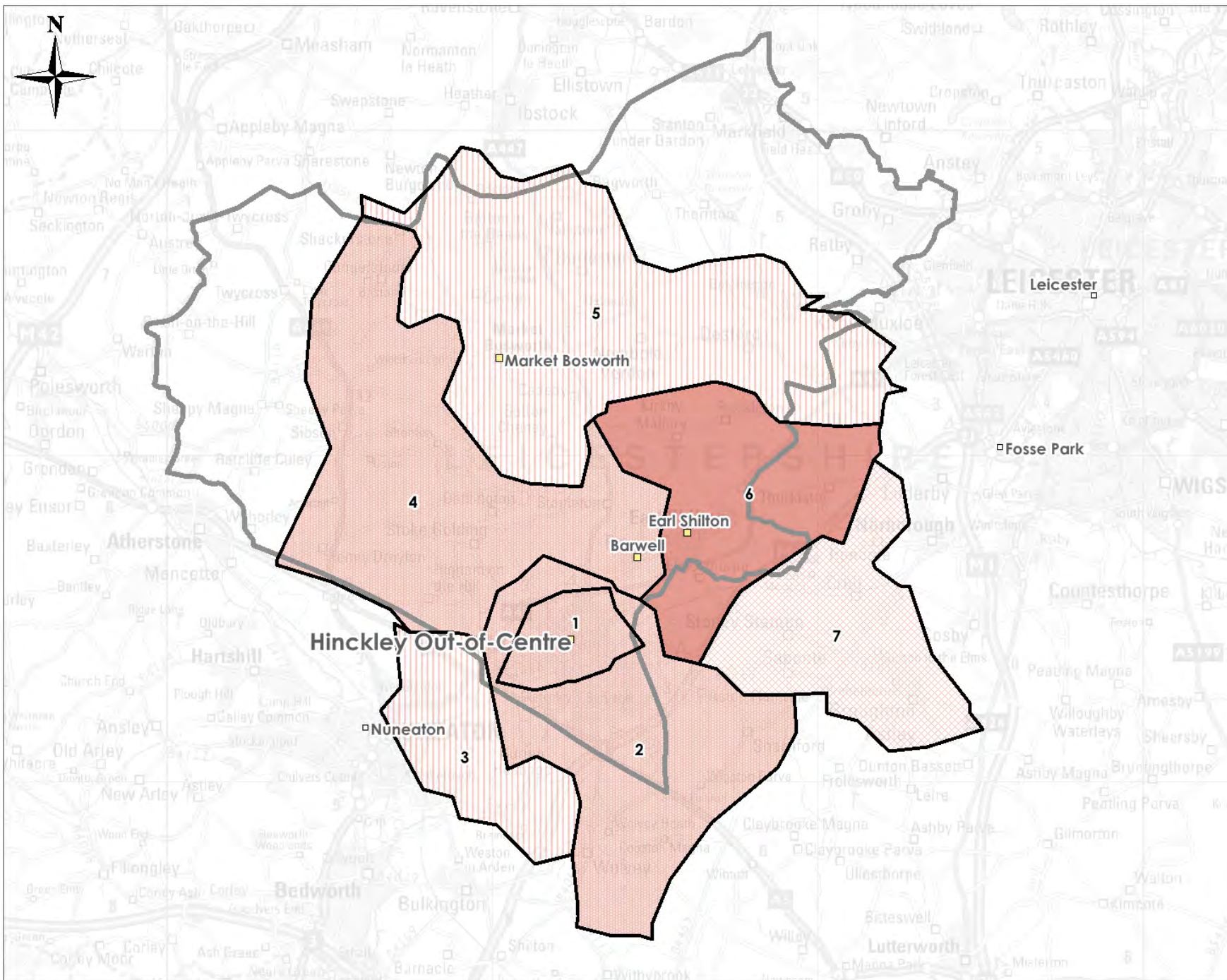
□ Hinckley & Bosworth District

Comparison goods market shares

- > 45%
- 30% - 45%
- 20% - 30%
- 15% - 20%
- 10% - 15%
- 5% - 10%
- 0.5% - 5%

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Plan 3: Hinckley Town Centre comparison goods market share



Hinckley & Bosworth Town and District Centres Study 2016

Key

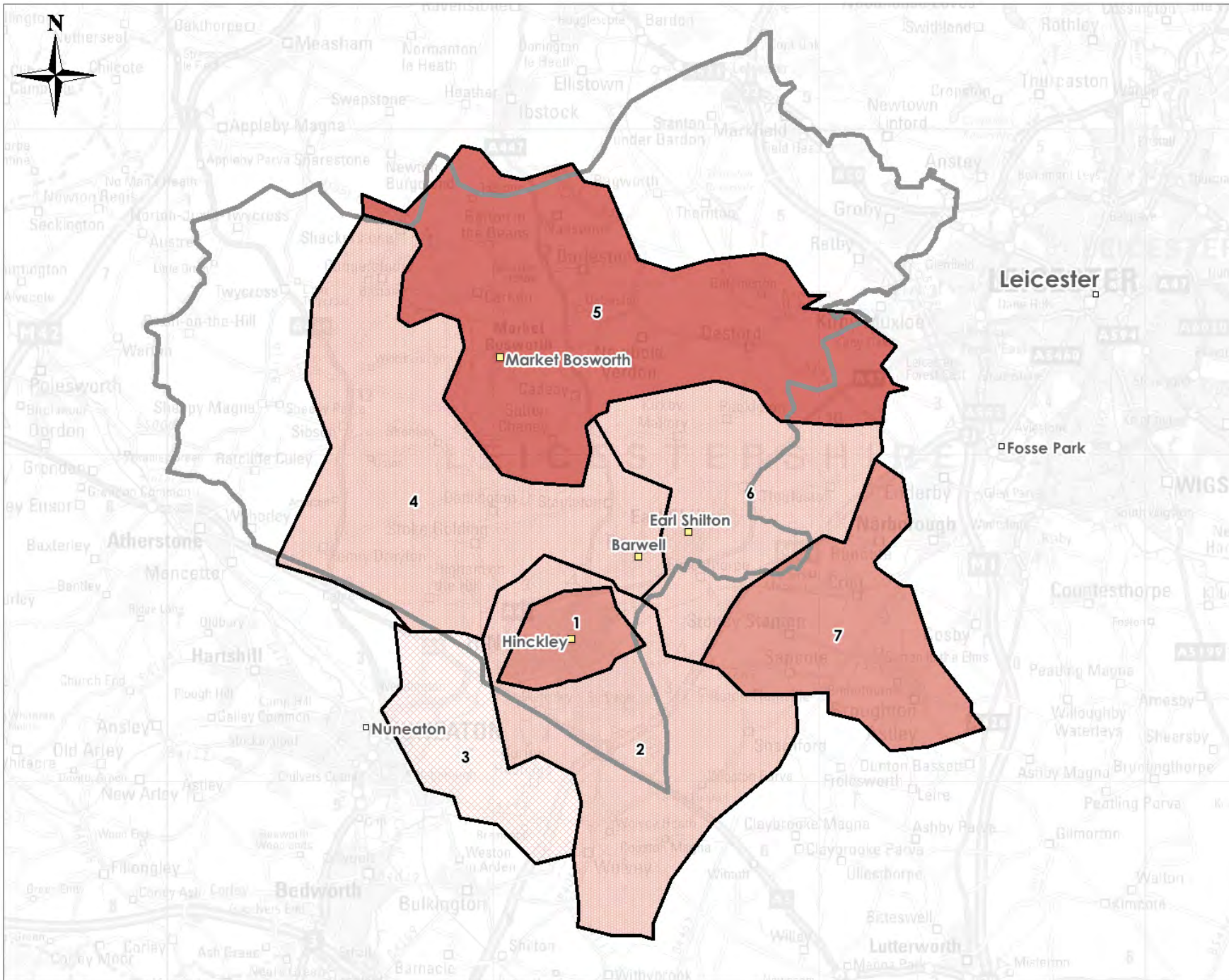
□ Hinckley & Bosworth District

Comparison goods market shares

- > 45%
- 30% - 45%
- 20% - 30%
- 15% - 20%
- 10% - 15%
- 5% - 10%
- 0.5% - 5%

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Plan 4: Hinckley Out-of-Centre comparison goods market share



Hinckley & Bosworth Town and District Centres Study 2016

Key

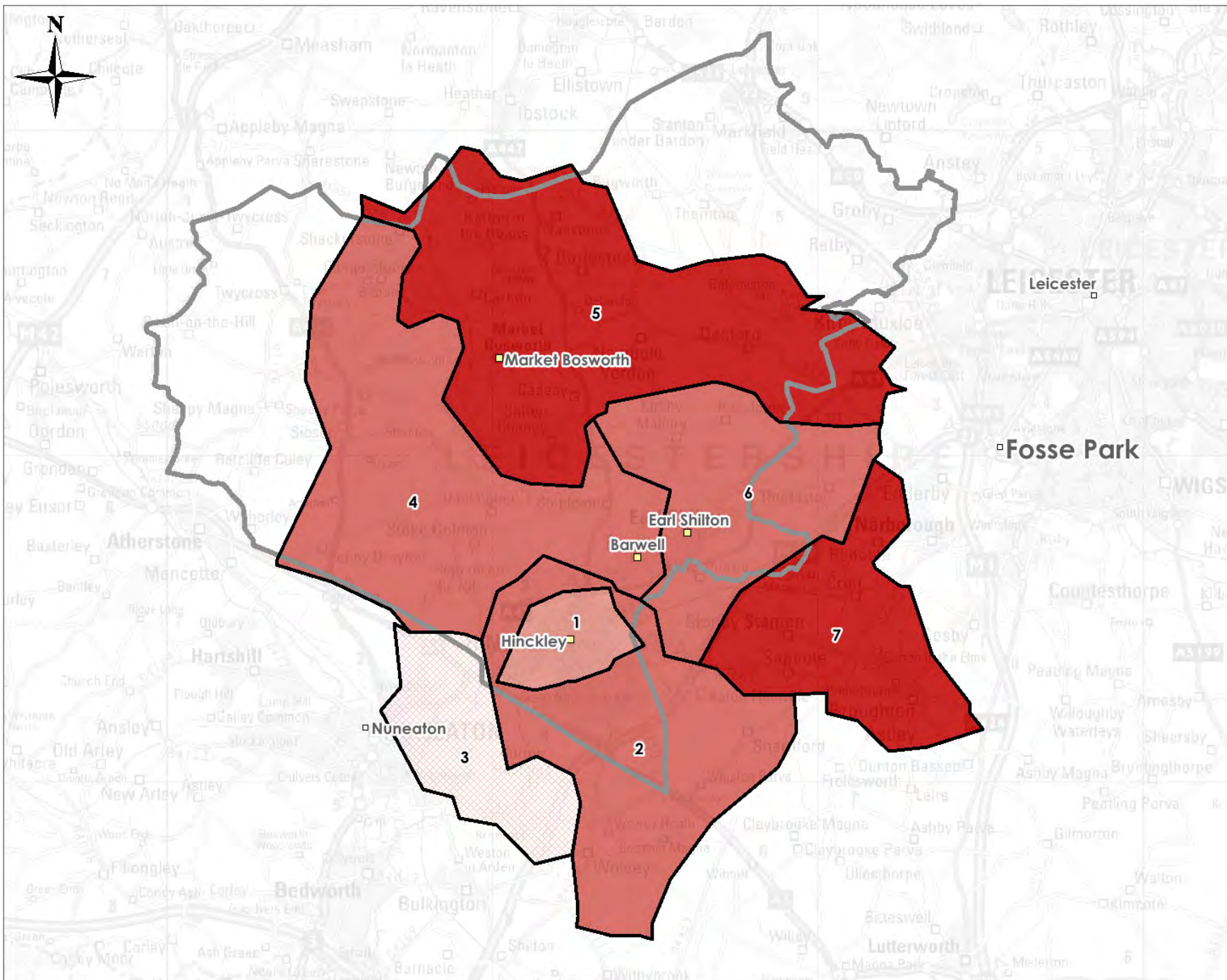
Hinckley & Bosworth District

Comparison goods market shares

- > 45%
- 30% - 45%
- 20% - 30%
- 15% - 20%
- 10% - 15%
- 5% - 10%
- 0.5% - 5%

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Plan 5: Leicester City Centre comparison goods market share



Hinckley & Bosworth Town and District Centres Study 2016

Key

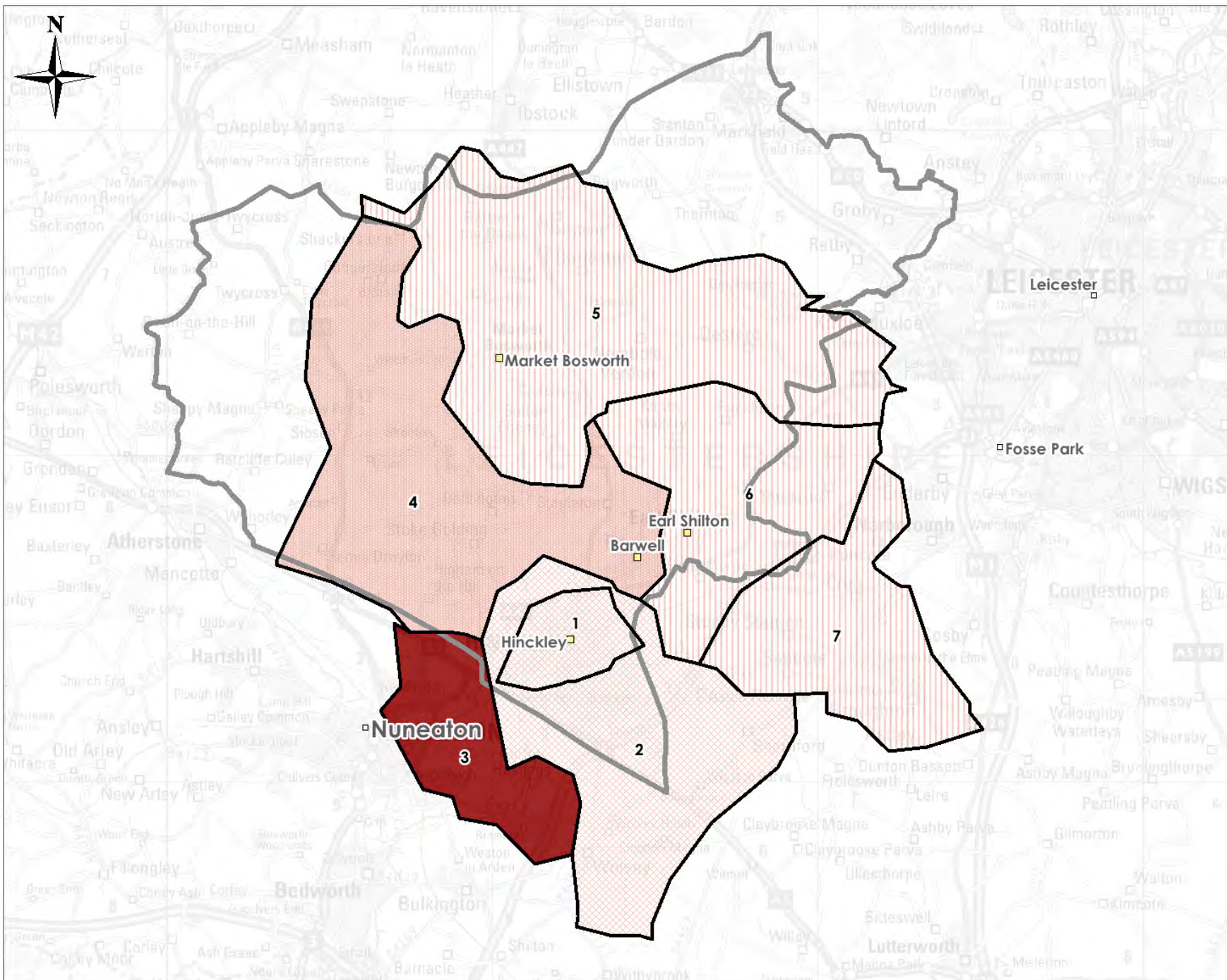
□ Hinckley & Bosworth District

Comparison goods market share

- > 45%
- 30% - 45%
- 20% - 30%
- 15% - 20%
- 10% - 15%
- 5% - 10%
- 0.5% - 5%

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Plan 6: Fosse Park comparison goods market share



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Key

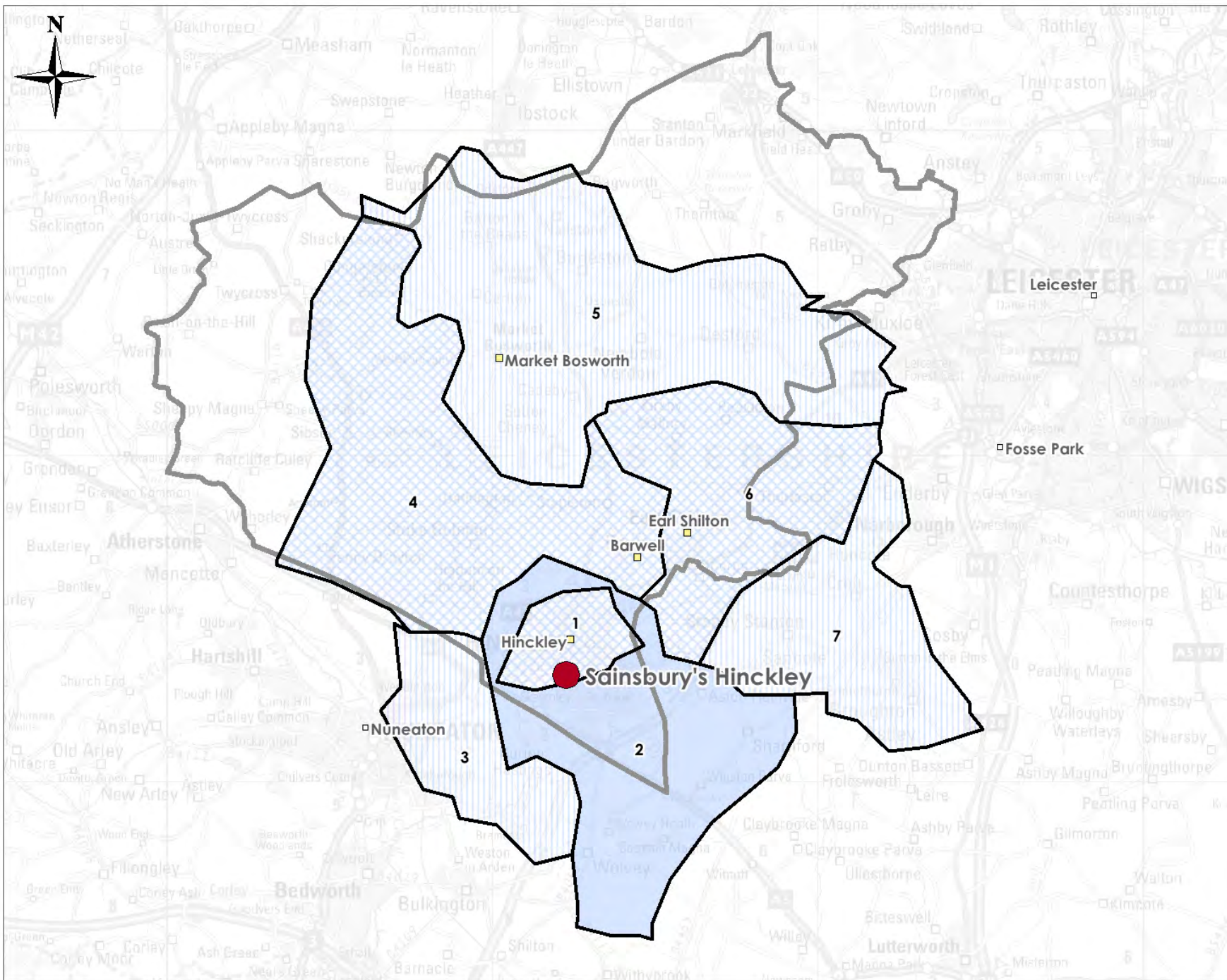
Hinckley & Bosworth District

Comparison goods market share

- > 45%
- 30% - 45%
- 20% - 30%
- 15% - 20%
- 10% - 15%
- 5% - 10%
- 0.5% - 5%

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Plan 7: Nuneaton comparison goods market share



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Key

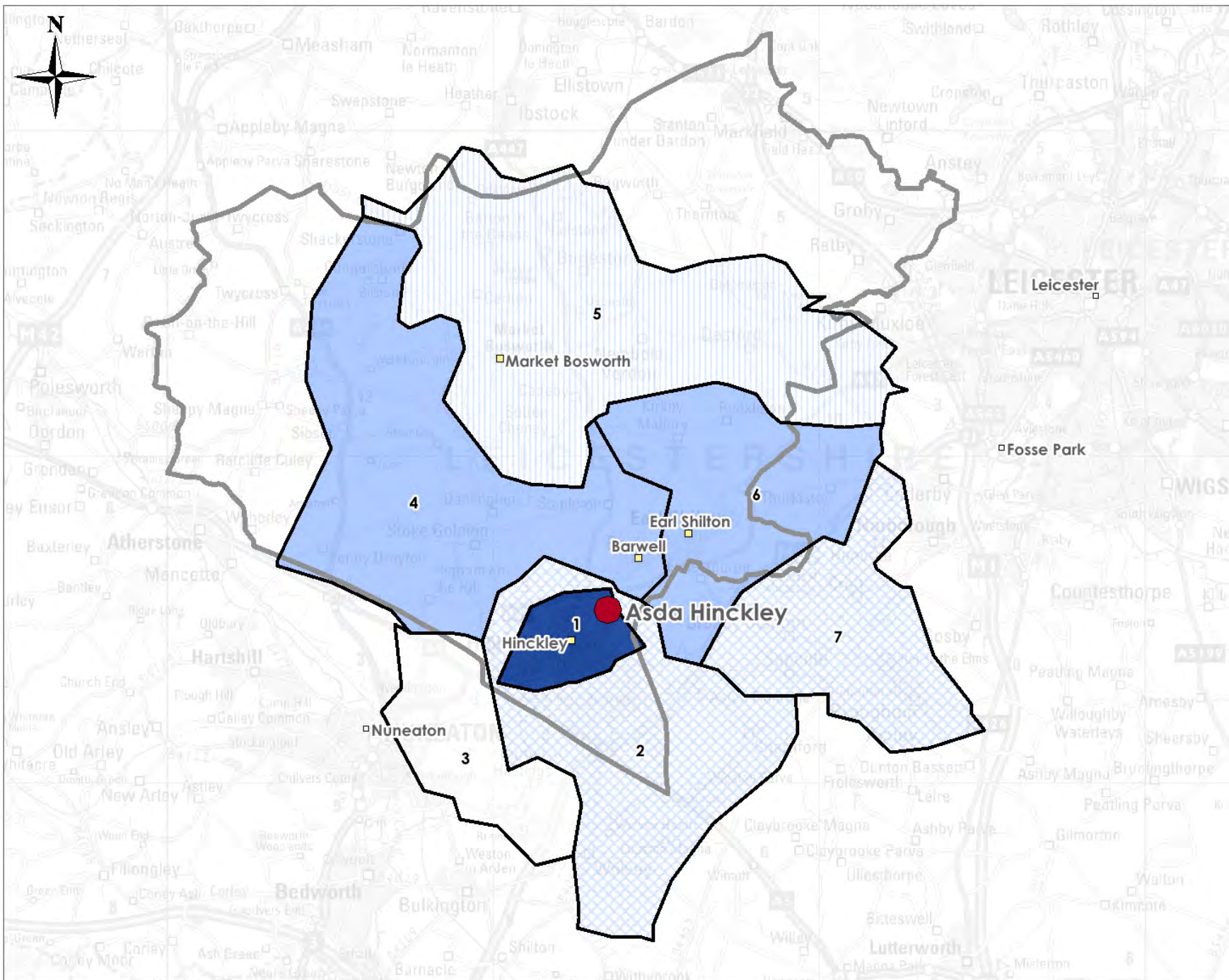
Hinckley & Bosworth District

Convenience goods market share

- 20% - 30%
- 15% - 20%
- 10% - 15%
- 5% - 10%
- 0.5% - 5%

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Plan 8: Sainsbury's Hinckley convenience goods market share



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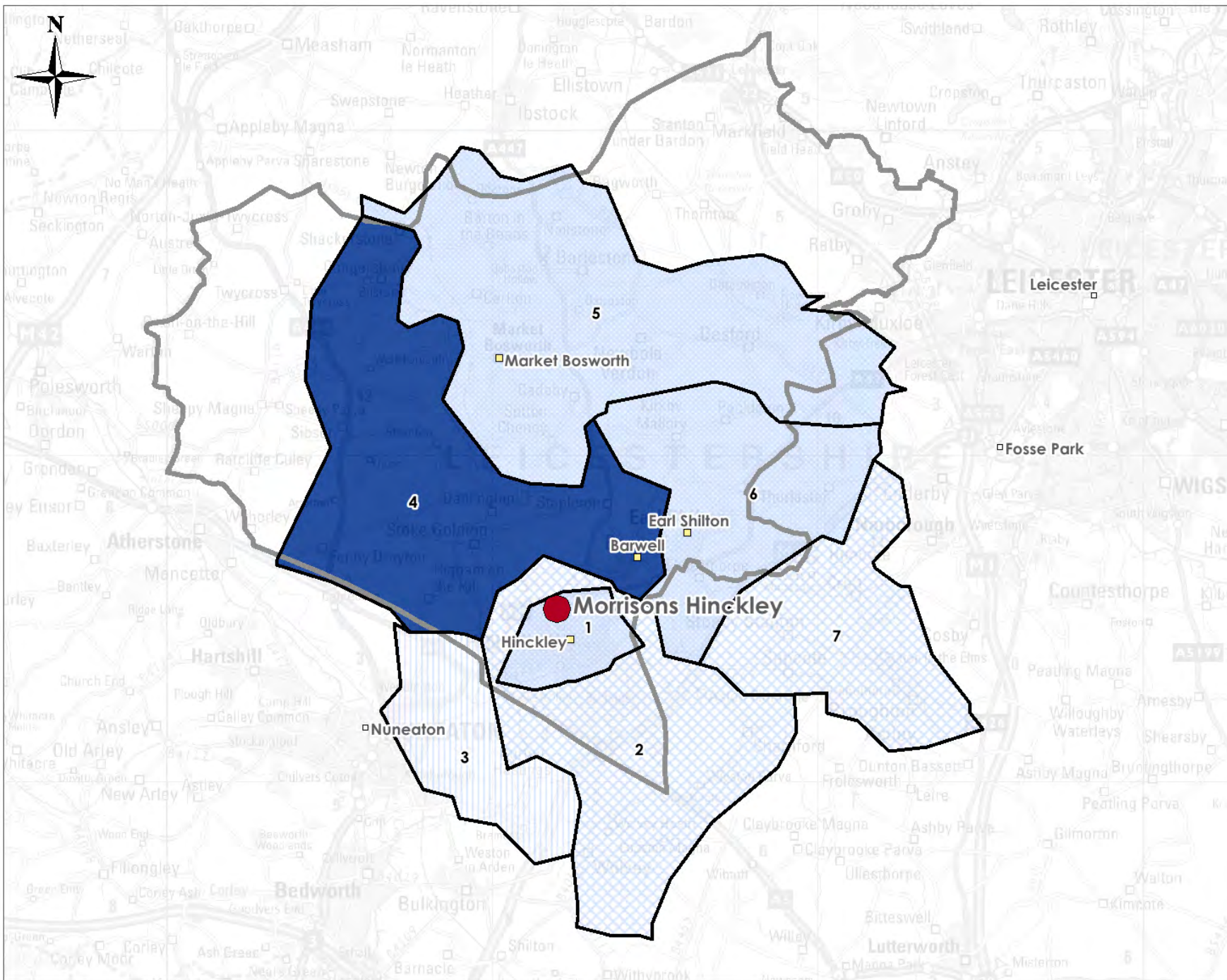
Key
 □ Hinckley & Bosworth District

Convenience goods market share

- 20% - 30%
- 15% - 20%
- 10% - 15%
- 5% - 10%
- 0.5% - 5%

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Plan 9: Asda Hinckley convenience goods market share



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Key

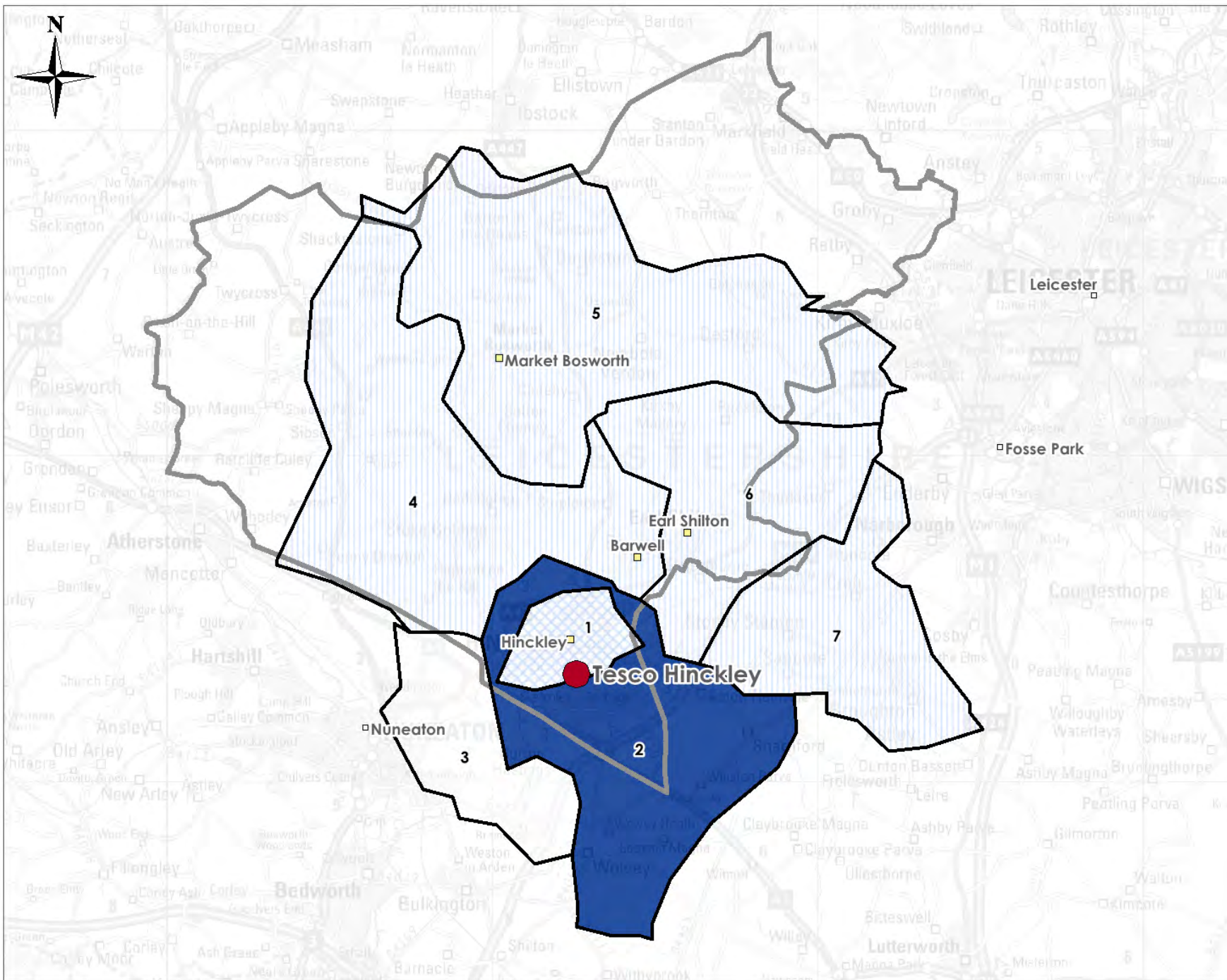
Hinckley & Bosworth District

Convenience goods market share

- 20% - 30%
- 15% - 20%
- 10% - 15%
- 5% - 10%
- 0.5% - 5%

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Plan 10: Morrisons Hinckley convenience goods market share



Hinckley & Bosworth Town and District Centres Study 2016

Key

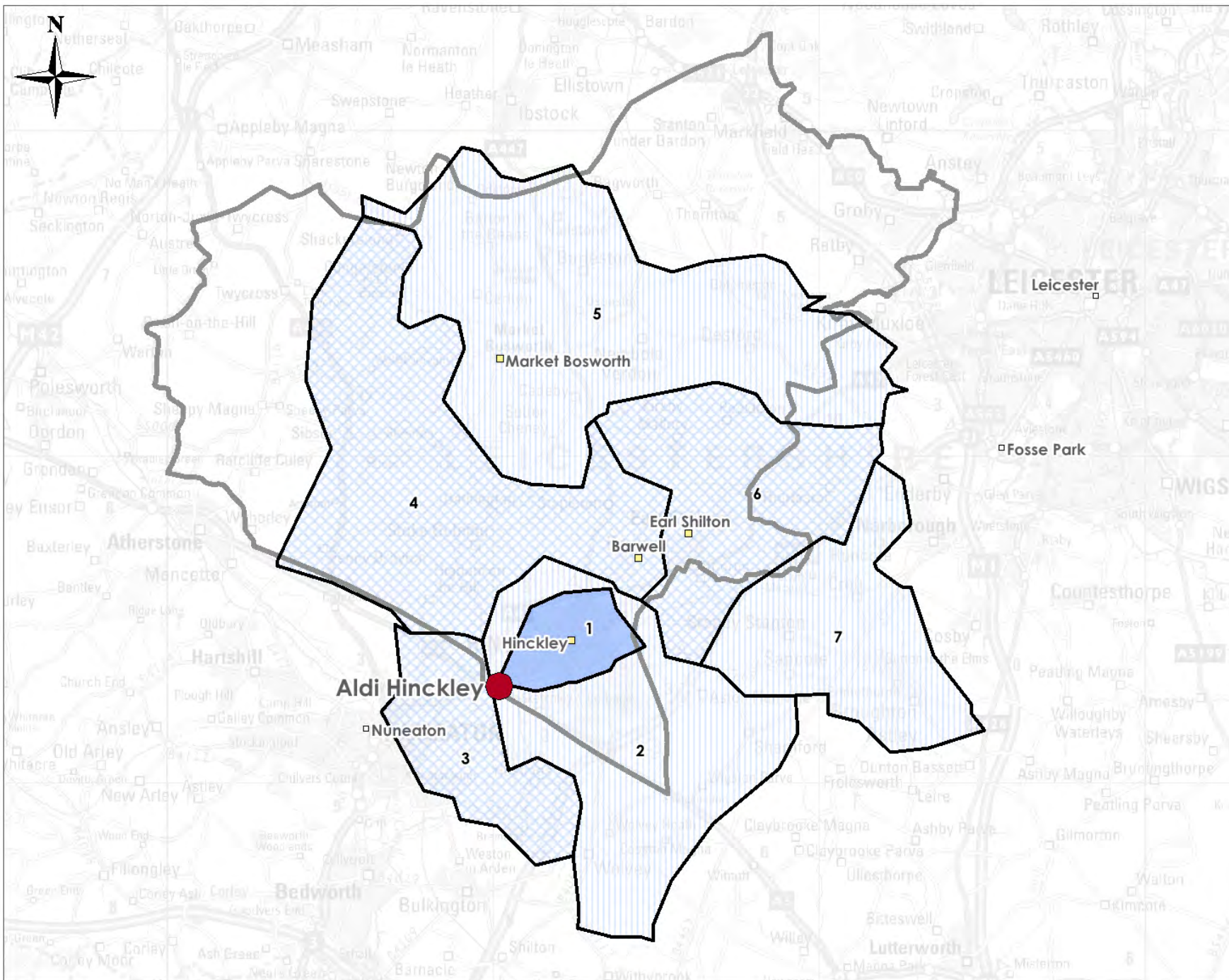
□ Hinckley & Bosworth District

Convenience goods market share

- 20% - 30%
- 15% - 20%
- 10% - 15%
- 5% - 10%
- 0.5% - 5%

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Plan 11: Tesco Hinckley convenience goods market share



Hinckley & Bosworth Town and District Centres Study 2016

Key

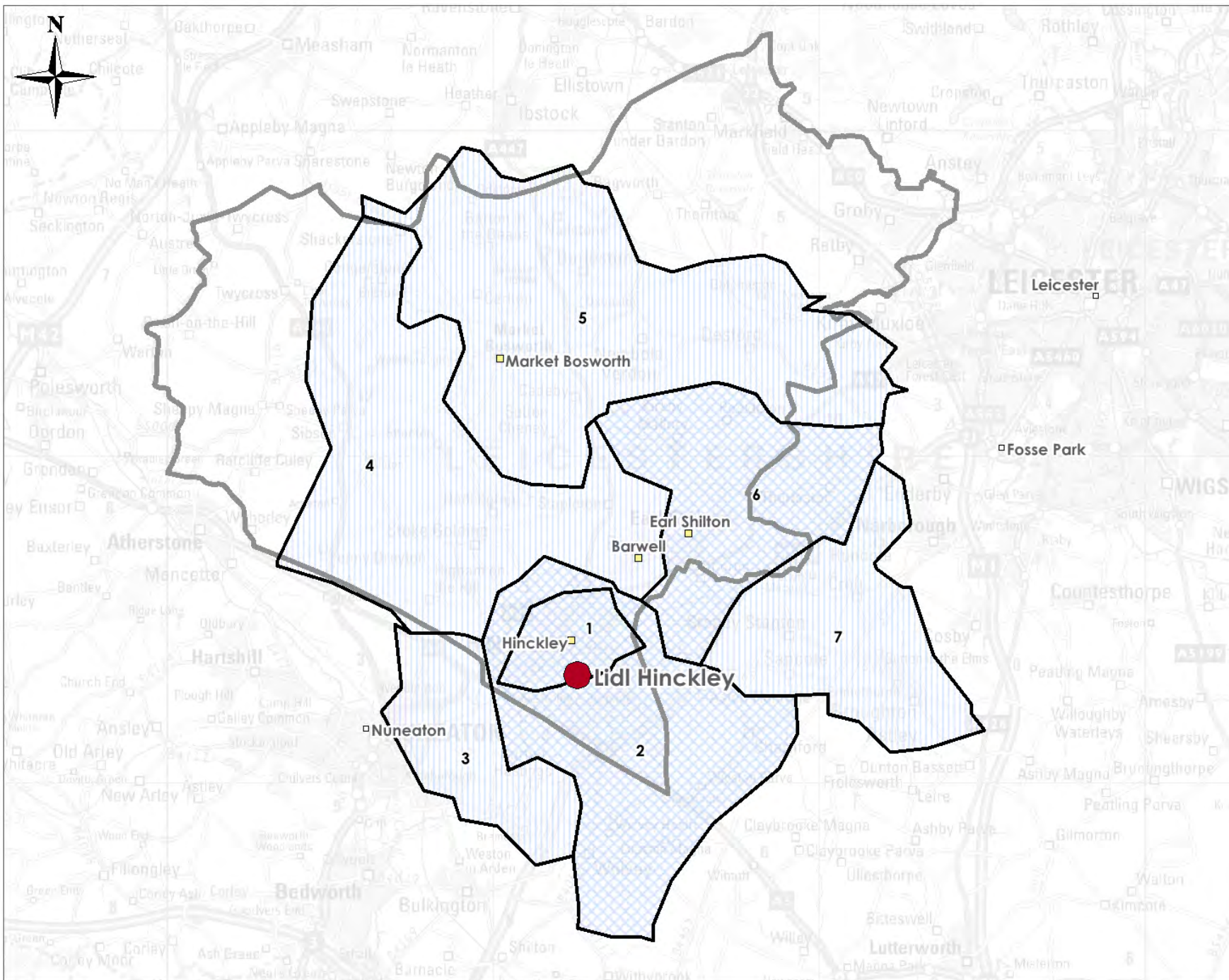
Hinckley & Bosworth District

Convenience goods market share

- 20% - 30%
- 15% - 20%
- 10% - 15%
- 5% - 10%
- 0.5% - 5%

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Plan 12: Aldi Hinckley convenience goods market share



Hinckley & Bosworth Town and District Centres Study 2016

Key

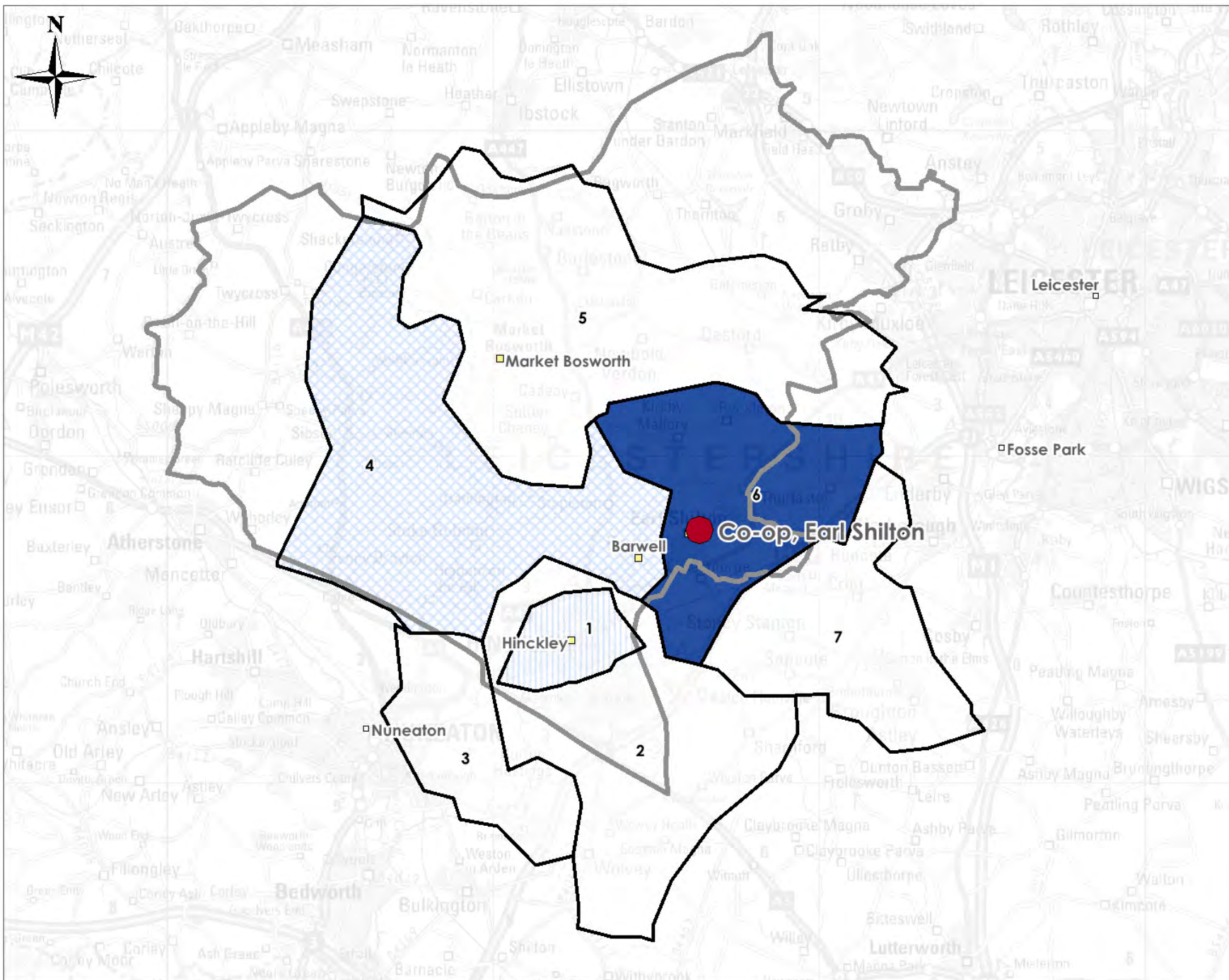
□ Hinckley & Bosworth District

Convenience goods market share

- 20% - 30%
- 15% - 20%
- 10% - 15%
- 5% - 10%
- 0.5% - 5%

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Plan 13: Lidl Hinckley convenience goods market share



Hinckley & Bosworth Town and District Centres Study 2016

Key

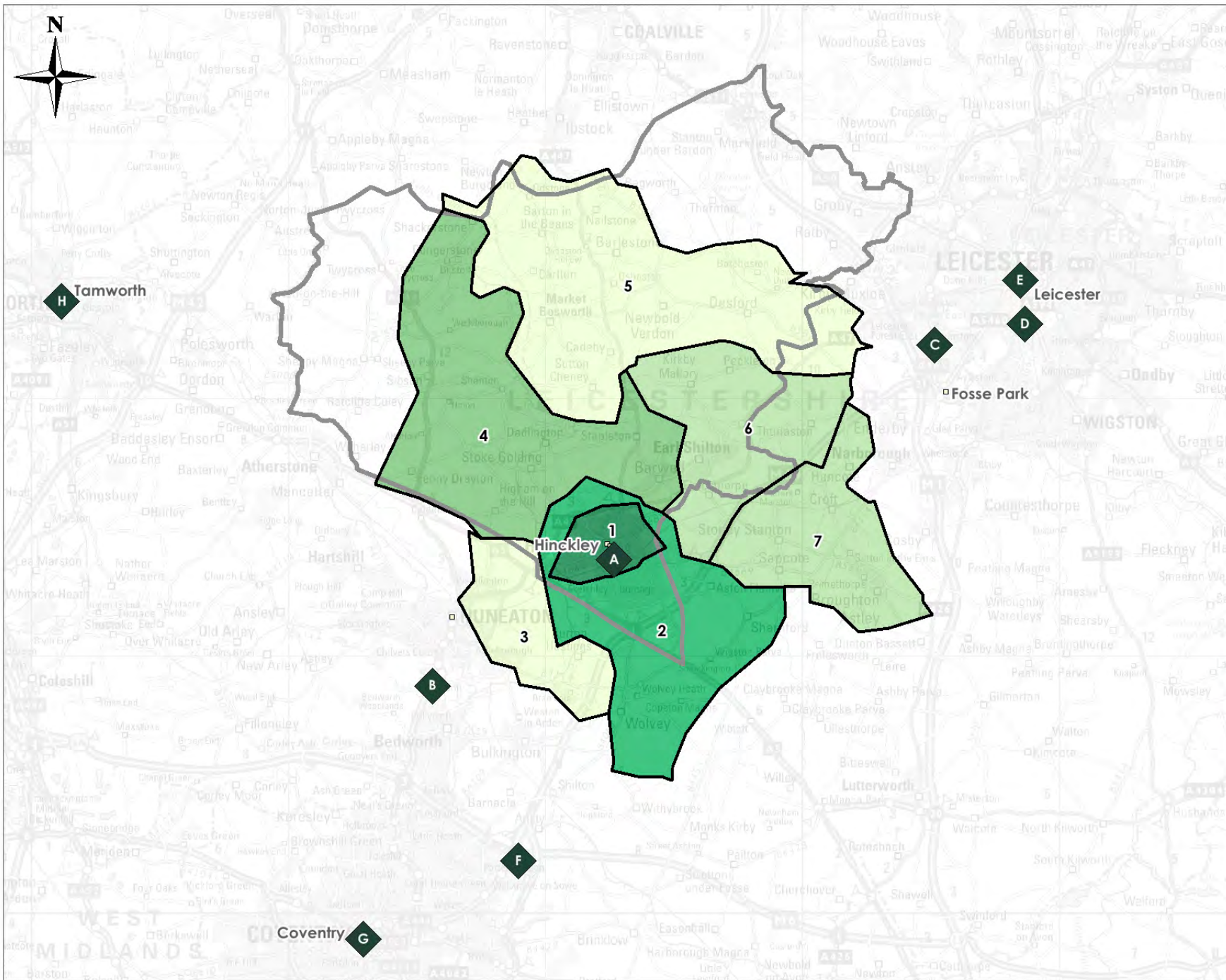
□ Hinckley & Bosworth District

Convenience goods market share

- 20% - 30%
- 15% - 20%
- 10% - 15%
- 5% - 10%
- 0.5% - 5%

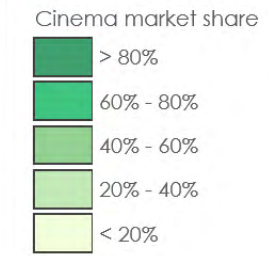
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Plan 14: Co-op Earl Shilton convenience goods market share



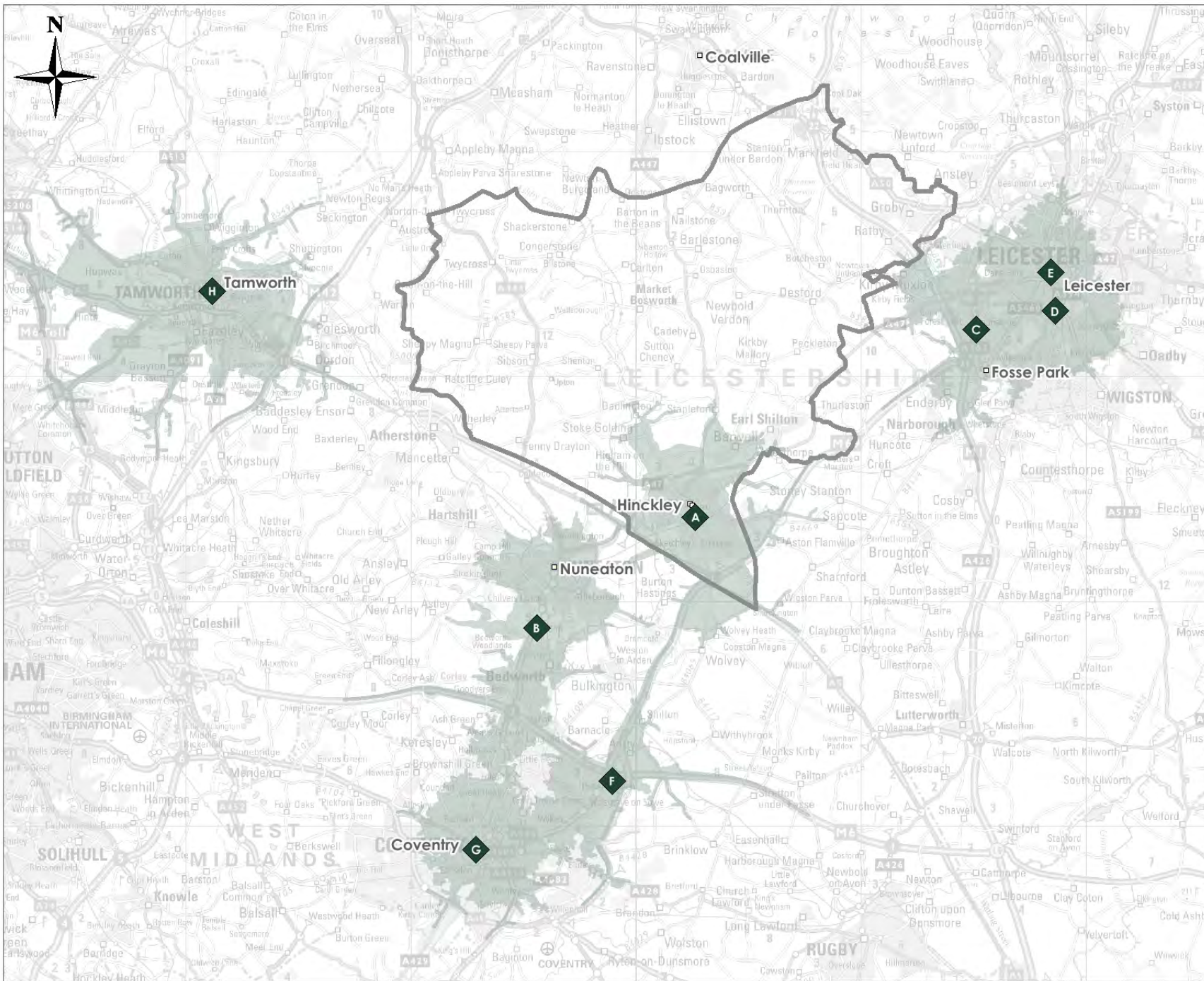
Hinckley & Bosworth Town and District Centres Study 2016

- Key**
- Hinckley & Bosworth District
 - Cinema
- A Cineworld, The Crescent, Hinckley
 - B Odeon, St Davids Way, Nuneaton
 - C Vue, Meridian Leisure Park, Leicester
 - D Odeon, Freemans Park, Leicester
 - E Showcase, Highcross, Leicester
 - F Showcase, Cross Point Business Park, Coventry
 - G Odeon, Skydome, Coventry
 - H Odeon, Bolebridge Street, Tamworth



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Plan 15: Cineworld, Hinckley cinema market share plan



Hinckley & Bosworth Town and District Centres Study 2016

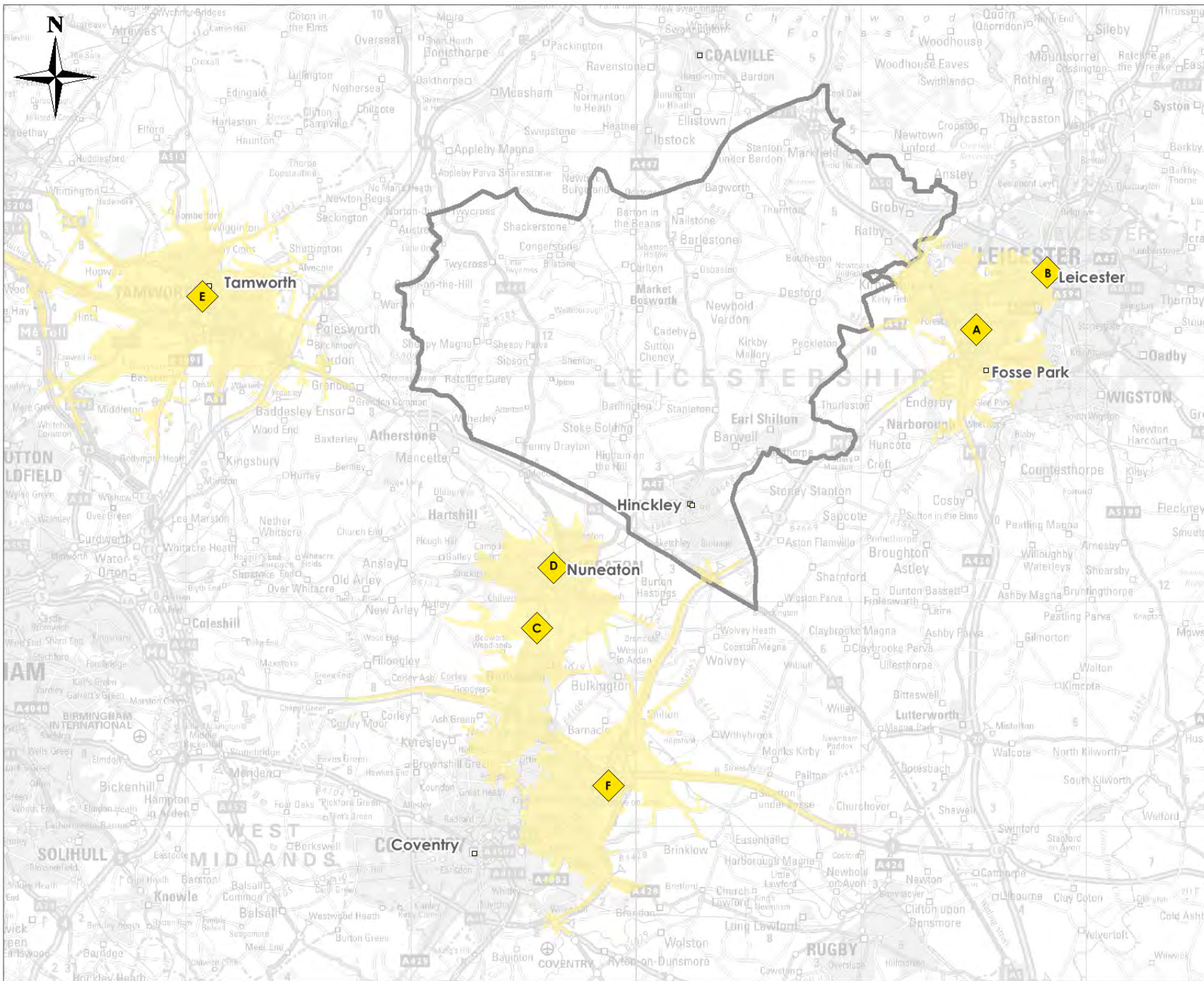
Key

-  Hinckley & Bosworth District
-  Cinema
-  10 Minute Drive-Time Catchment

Map Ref	Name	Market Share
A	Cineworld, Hinckley	51%
B	Odeon, Nuneaton	18%
C	Vue, Meridian Pk, Leicester	17%
D	Odeon, Freemans Pk, Leicester	1%
E	Showcase, Leicester	4%
F	Showcase, Coventry	4%
G	Odeon, Coventry	3%
H	Odeon, Tamworth	1%

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Plan 16 : Cinema Provision Plan



Hinckley & Bosworth Town and District Centres Study 2016

Key

- Hinckley & Bosworth District
- Family Entertainment Venue
- 10 Minute Drive-Time Catchment

Map Ref	Name	Market Share
A	Hollywood Bowl, Meridian Leisure Park, Leicester	39%
B	Leicester (other)	3%
C	MFA Superbowl, Nuneaton	24%
D	Nuneaton (other)	9%
E	Snowdome, Tamworth	2%
F	Tenpin, Coventry	7%

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Plan 17: Family Entertainment Provision Plan

COMPARISON GOODS MODELLING

Hinckley & Bosworth Borough Council — Town & District Centres Study 2016
 Comparison capacity modelling

Table 1: Population forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
2015	32,224	17,518	16,884	16,141	13,520	12,218	19,557	128,062
2016	32,436	17,610	16,975	16,270	13,600	12,307	19,694	128,892
2021	33,598	18,074	17,388	16,806	14,062	12,699	20,319	132,946
2026	34,664	18,450	17,708	17,286	14,463	13,040	20,898	136,509
2031	35,630	18,772	17,946	17,657	14,712	13,400	21,458	139,575
2036	37,181	19,300	18,348	18,206	14,997	13,940	22,373	144,345
Change 2016-36	4,745	1,690	1,373	1,936	1,397	1,633	2,679	15,453

Source: Experian Micromarketer, 2014-based population projections

Survey area postcode sectors

Zone	Postal Sectors
Zone 1	LE10 0 / LE10 1
Zone 2	LE10 2 / LE10 3
Zone 3	CV11 6
Zone 4	LE9 8 / CV13 6
Zone 5	LE9 9 / CV13 0
Zone 6	LE9 7
Zone 7	LE9 3 / LE9 4 / LE9 6

Hinckley & Bosworth Borough Council — Town & District Centres Study 2016
Comparison capacity modelling

Table 2: Comparison goods per capita expenditure by survey zone (2014 prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
	(£)	(£)	(£)	(£)	(£)	(£)	(£)
2014	3,235	3,725	3,960	3,354	3,774	3,154	3,563
2016	3,628	4,176	4,440	3,761	4,232	3,537	3,995
2016 Minus SFT at 13.2%	3,149	3,625	3,854	3,264	3,673	3,070	3,467
2021	4,072	4,780	5,083	4,305	4,844	4,048	4,572
2021 Minus SFT at 15.6%	3,436	4,035	4,290	3,633	4,088	3,417	3,859
2026	4,748	5,574	5,926	5,019	5,648	4,720	5,332
2026 Minus SFT at 16.1%	3,983	4,677	4,972	4,211	4,739	3,960	4,473
2031	5,557	6,525	6,937	5,876	6,611	5,525	6,241
2031 Minus SFT at 16.3%	4,652	5,461	5,807	4,918	5,534	4,625	5,224
2036	6,505	7,638	8,121	6,878	7,739	6,468	7,306
2036 Minus SFT at 16.5%	5,432	6,377	6,781	5,743	6,462	5,401	6,100

Expenditure growth rates: 2014-15: 5.5%pa; 2015-16: 5.3%pa; 2016-17: 3.2%pa; 2017-18: 2.9%pa; 2018-23: 3.0%pa; 2023-36: 3.2%pa

Source: Experian E-Marketer, October 2014. Growth rates and allowance for SFT are derived from Experian Retail Planner 12.1

Table 3: Total comparison goods expenditure available to survey area (2014 prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
2016	102.1	63.8	65.4	53.1	50.0	37.8	68.3	440.5
2021	115.5	72.9	74.6	61.1	57.5	43.4	78.4	503.3
2026	138.1	86.3	88.0	72.8	68.5	51.6	93.5	598.9
2031	165.7	102.5	104.2	86.8	81.4	62.0	112.1	714.8
2036	202.0	123.1	124.4	104.6	96.9	75.3	136.5	862.7
Change 2016-36	99.8	59.2	59.0	51.4	47.0	37.5	68.2	422.2

Source: Tables 1 & 2

Hinckley & Bosworth Borough Council — Town & District Centres Study 2016
Comparison capacity modelling

Table 4: Comparison goods allocation 2016 (% market share)

Zone Centre/Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)
Comparison goods floorspace in Hinckley & Bosworth							
Hinckley town centre							
Hinckley town centre (zone 1)	38.1%	40.5%	1.1%	27.6%	10.4%	34.3%	18.2%
Sainsbury's, Rugby Road, Hinckley (zone 1)	0.8%	1.0%	0.2%	2.8%	0.1%	1.6%	0.0%
Sub-total, Hinckley town centre	38.9%	41.5%	1.4%	30.4%	10.5%	35.9%	18.2%
Out-of-centre retail warehousing							
Out-of-centre retail warehousing, Hinckley (zone 1)	6.6%	4.1%	0.7%	3.9%	3.1%	5.4%	4.1%
Out-of-centre foodstores, Hinckley (zone 1)	6.2%	6.5%	0.2%	6.9%	1.4%	10.0%	3.3%
Sub-total, Hinckley out-of-centre floorspace	12.8%	10.6%	0.9%	10.8%	4.4%	15.3%	7.5%
Other locations in Hinckley & Bosworth Borough							
Barwell (zone 4)	0.1%	0.0%	0.0%	2.5%	0.0%	0.0%	0.1%
Earl Shilton (zone 6)	0.6%	0.2%	0.1%	1.4%	0.1%	7.1%	0.0%
Sub-total, other locations in Hinckley & Bosworth Borough	0.7%	0.2%	0.1%	3.9%	0.1%	7.1%	0.1%
Sub-total, comparison goods floorspace in H&B (A)	52.4%	52.2%	2.3%	45.1%	15.1%	58.3%	25.8%
Comparison goods floorspace outside Hinckley & Bosworth Borough /outside survey area							
Leicester							
Leicester city centre	17.1%	10.6%	5.7%	14.4%	27.7%	10.1%	19.6%
Fosse Park (incl. Sainsbury's / Asda foodstores)	18.1%	20.3%	7.9%	21.7%	33.3%	23.5%	42.4%
Other retail warehousing / foodstores, Leicester	0.0%	0.0%	0.2%	0.0%	3.4%	0.4%	1.2%
Sub-total, Leicester	35.3%	30.8%	13.9%	36.1%	64.5%	34.0%	63.2%
Nuneaton							
Nuneaton town centre	7.0%	4.6%	51.4%	11.0%	3.6%	2.5%	0.3%
Retail warehousing / foodstores, Nuneaton	0.3%	0.4%	8.1%	0.8%	0.0%	0.1%	0.2%
Sub-total, Nuneaton	7.3%	5.0%	59.5%	11.7%	3.6%	2.7%	0.5%
Coventry							
Coventry city centre	1.6%	2.4%	9.8%	2.1%	0.8%	0.4%	0.1%
Retail warehousing / foodstores, Coventry	0.3%	2.9%	5.1%	0.9%	0.0%	1.5%	0.4%
Sub-total, Coventry	1.9%	5.3%	14.9%	2.9%	0.8%	1.8%	0.5%
Other locations							
Birmingham	1.0%	0.4%	2.7%	0.6%	0.8%	0.0%	0.3%
Tamworth	0.7%	0.3%	2.3%	0.4%	2.1%	0.0%	0.2%
Coalville	0.0%	0.1%	0.0%	0.2%	5.3%	0.0%	0.0%
All other locations outside survey area	0.7%	1.8%	3.3%	2.4%	5.1%	2.9%	5.7%
Sub-total, other locations	2.4%	2.5%	8.3%	3.6%	13.3%	2.9%	6.3%
Sub-total, comparison goods floorspace outside survey area (B)	46.8%	43.7%	96.5%	54.3%	82.2%	41.5%	70.5%
Local / small shops in survey area (C)	0.8%	4.1%	1.2%	0.5%	2.7%	0.2%	3.7%
OVERALL TOTAL (A+B+C)	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NEMS Market Research Telephone Survey, July 2016

Hinckley & Bosworth Borough Council — Town & District Centres Study 2016
Comparison capacity modelling

Table 5a: Comparison goods allocation 2016 - spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Total (£m)	Total (%)
Total available comparison goods spend — 2016	102.1	63.8	65.4	53.1	50.0	37.8	68.3	440.5	100.0
Comparison goods floorspace in Hinckley & Bosworth									
Hinckley town centre									
Hinckley town centre (zone 1)	38.9	25.8	0.7	14.7	5.2	13.0	12.4	110.7	25.1%
Sainsbury's, Rugby Road, Hinckley (zone 1)	0.9	0.6	0.2	1.5	0.1	0.6	0.0	3.8	0.9%
Sub-total, Hinckley town centre	39.7	26.5	0.9	16.2	5.3	13.6	12.4	114.5	26.0%
Out-of-centre retail warehousing									
Out-of-centre retail warehousing, Hinckley (zone 1)	6.7	2.6	0.5	2.1	1.5	2.0	2.8	18.3	4.1%
Out-of-centre foodstores, Hinckley (zone 1)	6.3	4.1	0.1	3.7	0.7	3.8	2.3	21.0	4.8%
Sub-total, Hinckley out-of-centre floorspace	13.1	6.8	0.6	5.7	2.2	5.8	5.1	39.3	8.9%
Other locations in Hinckley & Bosworth Borough									
Barwell (zone 4)	0.1	0.0	0.0	1.3	0.0	0.0	0.1	1.5	0.3%
Earl Shilton (zone 6)	0.6	0.1	0.0	0.8	0.1	2.7	0.0	4.3	1.0%
Sub-total, other locations in Hinckley & Bosworth Borough	0.7	0.1	0.0	2.1	0.1	2.7	0.1	5.8	1.3%
Sub-total, comparison goods floorspace in H&B (A)	53.5	33.4	1.5	24.0	7.6	22.0	17.6	159.6	36.2%
Comparison goods floorspace outside Hinckley & Bosworth Borough /outside survey area									
Leicester									
Leicester city centre	17.5	6.8	3.7	7.6	13.9	3.8	13.4	66.7	15.1%
Fosse Park (incl. Sainsbury's / Asda foodstores)	18.5	12.9	5.2	11.5	16.7	8.9	29.0	102.7	23.3%
Other retail warehousing / foodstores, Leicester	0.0	0.0	0.2	0.0	1.7	0.2	0.8	2.8	0.6%
Sub-total, Leicester	36.0	19.7	9.1	19.2	32.2	12.9	43.2	172.2	39.1%
Nuneaton									
Nuneaton town centre	7.2	2.9	33.6	5.8	1.8	1.0	0.2	52.5	11.9%
Retail warehousing / foodstores, Nuneaton	0.3	0.3	5.3	0.4	0.0	0.1	0.1	6.4	1.5%
Sub-total, Nuneaton	7.5	3.2	38.9	6.2	1.8	1.0	0.4	59.0	13.4%
Coventry									
Coventry city centre	1.6	1.5	6.4	1.1	0.4	0.1	0.1	11.3	2.6%
Retail warehousing / foodstores, Coventry	0.3	1.9	3.3	0.5	0.0	0.6	0.3	6.8	1.5%
Sub-total, Coventry	1.9	3.4	9.7	1.6	0.4	0.7	0.3	18.0	4.1%
Other locations									
Birmingham	1.0	0.2	1.8	0.3	0.4	0.0	0.2	4.0	0.9%
Tamworth	0.7	0.2	1.5	0.2	1.0	0.0	0.1	3.8	0.9%
Coalville	0.0	0.0	0.0	0.1	2.7	0.0	0.0	2.8	0.6%
All other locations outside survey area	0.7	1.2	2.2	1.3	2.5	1.1	3.9	12.8	2.9%
Sub-total, other locations	2.4	1.6	5.4	1.9	6.6	1.1	4.3	23.4	5.3%
Sub-total, comparison goods floorspace outside survey area (B)	47.8	27.9	63.1	28.9	41.0	15.7	48.2	272.6	61.9%
Local / small shops in survey area (C)	0.8	2.6	0.8	0.3	1.3	0.1	2.5	8.3	1.9%
OVERALL TOTAL (A+B+C)	102.1	63.8	65.4	53.1	50.0	37.8	68.3	440.5	100.0%

Source: Table 3, Table 4

Hinckley & Bosworth Borough Council — Town & District Centres Study 2016
Comparison capacity modelling

Table 5b: Comparison goods allocation 2021 - spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Total (£m)	Total (%)
Total available comparison goods spend — 2021	115.5	72.9	74.6	61.1	57.5	43.4	78.4	503.3	100.0
Comparison goods floorspace in Hinckley & Bosworth									
Hinckley town centre									
Hinckley town centre (zone 1)	43.9	29.5	0.8	16.9	6.0	14.9	14.3	126.3	25.1%
Sainsbury's, Rugby Road, Hinckley (zone 1)	1.0	0.7	0.2	1.7	0.1	0.7	0.0	4.4	0.9%
Sub-total, Hinckley town centre	44.9	30.2	1.0	18.6	6.1	15.6	14.3	130.7	26.0%
Out-of-centre retail warehousing									
Out-of-centre retail warehousing, Hinckley (zone 1)	7.6	3.0	0.5	2.4	1.8	2.3	3.2	20.9	4.1%
Out-of-centre foodstores, Hinckley (zone 1)	7.1	4.7	0.1	4.2	0.8	4.3	2.6	24.0	4.8%
Sub-total, Hinckley out-of-centre floorspace	14.8	7.7	0.7	6.6	2.6	6.7	5.9	44.8	8.9%
Other locations in Hinckley & Bosworth Borough									
Barwell (zone 4)	0.1	0.0	0.0	1.5	0.0	0.0	0.1	1.8	0.3%
Earl Shilton (zone 6)	0.7	0.1	0.0	0.9	0.1	3.1	0.0	4.9	1.0%
Sub-total, other locations in Hinckley & Bosworth Borough	0.8	0.1	0.0	2.4	0.1	3.1	0.1	6.6	1.3%
Sub-total, comparison goods floorspace in H&B (A)	60.5	38.1	1.7	27.6	8.7	25.3	20.2	182.1	36.2%
Comparison goods floorspace outside Hinckley & Bosworth Borough /outside survey area									
Leicester									
Leicester city centre	19.8	7.7	4.3	8.8	15.9	4.4	15.4	76.3	15.2%
Fosse Park (incl. Sainsbury's / Asda foodstores)	20.9	14.8	5.9	13.3	19.2	10.2	33.3	117.5	23.3%
Other retail warehousing / foodstores, Leicester	0.0	0.0	0.2	0.0	2.0	0.2	0.9	3.3	0.6%
Sub-total, Leicester	40.7	22.5	10.4	22.0	37.1	14.8	49.6	197.0	39.1%
Nuneaton									
Nuneaton town centre	8.1	3.4	38.3	6.7	2.1	1.1	0.3	59.9	11.9%
Retail warehousing / foodstores, Nuneaton	0.4	0.3	6.0	0.5	0.0	0.1	0.2	7.4	1.5%
Sub-total, Nuneaton	8.4	3.7	44.3	7.2	2.1	1.2	0.4	67.2	13.4%
Coventry									
Coventry city centre	1.9	1.8	7.3	1.3	0.5	0.2	0.1	12.8	2.6%
Retail warehousing / foodstores, Coventry	0.3	2.1	3.8	0.5	0.0	0.6	0.3	7.7	1.5%
Sub-total, Coventry	2.2	3.9	11.1	1.8	0.5	0.8	0.4	20.6	4.1%
Other locations									
Birmingham	1.2	0.3	2.0	0.3	0.5	0.0	0.3	4.5	0.9%
Tamworth	0.8	0.2	1.7	0.3	1.2	0.0	0.2	4.4	0.9%
Coalville	0.0	0.0	0.0	0.1	3.1	0.0	0.0	3.2	0.6%
All other locations outside survey area	0.8	1.3	2.5	1.4	2.9	1.3	4.5	14.7	2.9%
Sub-total, other locations	2.7	1.9	6.2	2.2	7.6	1.3	4.9	26.8	5.3%
Sub-total, comparison goods floorspace outside survey area (B)	54.1	31.9	72.0	33.2	47.2	18.0	55.3	311.6	61.9%
Local / small shops in survey area (C)	0.9	3.0	0.9	0.3	1.5	0.1	2.9	9.6	1.9%
OVERALL TOTAL (A+B+C)	115.5	72.9	74.6	61.1	57.5	43.4	78.4	503.3	100.0%

Source: Table 3, Table 4

Hinckley & Bosworth Borough Council — Town & District Centres Study 2016
Comparison capacity modelling

Table 5c: Comparison goods allocation 2026 - spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Total (£m)	Total (%)
Total available comparison goods spend — 2026	138.1	86.3	88.0	72.8	68.5	51.6	93.5	598.9	100.0
Comparison goods floorspace in Hinckley & Bosworth									
Hinckley town centre									
Hinckley town centre (zone 1)	52.6	34.9	1.0	20.1	7.1	17.7	17.0	150.5	25.1%
Sainsbury's, Rugby Road, Hinckley (zone 1)	1.2	0.9	0.2	2.0	0.1	0.8	0.0	5.2	0.9%
Sub-total, Hinckley town centre	53.7	35.8	1.2	22.1	7.2	18.6	17.0	155.6	26.0%
Out-of-centre retail warehousing									
Out-of-centre retail warehousing, Hinckley (zone 1)	9.1	3.5	0.6	2.8	2.1	2.8	3.9	24.8	4.1%
Out-of-centre foodstores, Hinckley (zone 1)	8.5	5.6	0.2	5.0	0.9	5.2	3.1	28.6	4.8%
Sub-total, Hinckley out-of-centre floorspace	17.7	9.1	0.8	7.9	3.0	7.9	7.0	53.4	8.9%
Other locations in Hinckley & Bosworth Borough									
Barwell (zone 4)	0.2	0.0	0.0	1.8	0.0	0.0	0.1	2.1	0.3%
Earl Shilton (zone 6)	0.8	0.2	0.1	1.0	0.1	3.7	0.0	5.8	1.0%
Sub-total, other locations in Hinckley & Bosworth Borough	1.0	0.2	0.1	2.9	0.1	3.7	0.1	7.9	1.3%
Sub-total, comparison goods floorspace in H&B (A)	72.4	45.1	2.0	32.9	10.4	30.1	24.1	217.0	36.2%
Comparison goods floorspace outside Hinckley & Bosworth Borough /outside survey area									
Leicester									
Leicester city centre	23.7	9.1	5.0	10.5	19.0	5.2	18.3	90.9	15.2%
Fosse Park (incl. Sainsbury's / Asda foodstores)	25.0	17.5	7.0	15.8	22.8	12.1	39.7	139.9	23.4%
Other retail warehousing / foodstores, Leicester	0.0	0.0	0.2	0.0	2.3	0.2	1.1	3.9	0.6%
Sub-total, Leicester	48.7	26.6	12.2	26.3	44.2	17.6	59.1	234.7	39.2%
Nuneaton									
Nuneaton town centre	9.7	4.0	45.3	8.0	2.5	1.3	0.3	71.0	11.8%
Retail warehousing / foodstores, Nuneaton	0.4	0.3	7.1	0.6	0.0	0.1	0.2	8.7	1.5%
Sub-total, Nuneaton	10.1	4.3	52.4	8.5	2.5	1.4	0.5	79.6	13.3%
Coventry									
Coventry city centre	2.2	2.1	8.6	1.5	0.5	0.2	0.1	15.2	2.5%
Retail warehousing / foodstores, Coventry	0.4	2.5	4.5	0.6	0.0	0.8	0.3	9.2	1.5%
Sub-total, Coventry	2.6	4.6	13.1	2.1	0.6	0.9	0.4	24.4	4.1%
Other locations									
Birmingham	1.4	0.3	2.4	0.4	0.6	0.0	0.3	5.4	0.9%
Tamworth	1.0	0.3	2.0	0.3	1.4	0.0	0.2	5.2	0.9%
Coalville	0.0	0.0	0.0	0.1	3.7	0.0	0.0	3.9	0.6%
All other locations outside survey area	0.9	1.6	2.9	1.7	3.5	1.5	5.4	17.4	2.9%
Sub-total, other locations	3.3	2.2	7.3	2.6	9.1	1.5	5.9	31.9	5.3%
Sub-total, comparison goods floorspace outside survey area (B)	64.7	37.7	85.0	39.6	56.3	21.4	65.9	370.6	61.9%
Local / small shops in survey area (C)	1.0	3.5	1.0	0.4	1.8	0.1	3.5	11.4	1.9%
OVERALL TOTAL (A+B+C)	138.1	86.3	88.0	72.8	68.5	51.6	93.5	598.9	100.0%

Source: Table 3, Table 4

Hinckley & Bosworth Borough Council — Town & District Centres Study 2016
Comparison capacity modelling

Table 5d: Comparison goods allocation 2031 - spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Total (£m)	Total (%)
Total available comparison goods spend — 2031	165.7	102.5	104.2	86.8	81.4	62.0	112.1	714.8	100.0
Comparison goods floorspace in Hinckley & Bosworth									
Hinckley town centre									
Hinckley town centre (zone 1)	63.1	41.5	1.2	24.0	8.5	21.3	20.4	179.9	25.2%
Sainsbury's, Rugby Road, Hinckley (zone 1)	1.4	1.0	0.2	2.4	0.1	1.0	0.0	6.2	0.9%
Sub-total, Hinckley town centre	64.5	42.5	1.4	26.4	8.6	22.3	20.4	186.1	26.0%
Out-of-centre retail warehousing									
Out-of-centre retail warehousing, Hinckley (zone 1)	11.0	4.2	0.7	3.4	2.5	3.3	4.6	29.7	4.2%
Out-of-centre foodstores, Hinckley (zone 1)	10.3	6.7	0.2	6.0	1.1	6.2	3.7	34.2	4.8%
Sub-total, Hinckley out-of-centre floorspace	21.2	10.9	0.9	9.4	3.6	9.5	8.4	63.9	8.9%
Other locations in Hinckley & Bosworth Borough									
Barwell (zone 4)	0.2	0.0	0.0	2.2	0.0	0.0	0.1	2.5	0.4%
Earl Shilton (zone 6)	1.0	0.2	0.1	1.2	0.1	4.4	0.0	7.0	1.0%
Sub-total, other locations in Hinckley & Bosworth Borough	1.2	0.2	0.1	3.4	0.1	4.4	0.1	9.5	1.3%
Sub-total, comparison goods floorspace in H&B (A)	86.9	53.6	2.4	39.2	12.3	36.2	28.9	259.4	36.3%
Comparison goods floorspace outside Hinckley & Bosworth Borough /outside survey area									
Leicester									
Leicester city centre	28.4	10.8	6.0	12.5	22.6	6.3	22.0	108.5	15.2%
Fosse Park (incl. Sainsbury's / Asda foodstores)	30.0	20.8	8.3	18.9	27.1	14.6	47.6	167.2	23.4%
Other retail warehousing / foodstores, Leicester	0.0	0.0	0.3	0.0	2.8	0.3	1.3	4.6	0.6%
Sub-total, Leicester	58.4	31.6	14.5	31.3	52.5	21.1	70.9	280.3	39.2%
Nuneaton									
Nuneaton town centre	11.6	4.7	53.6	9.5	2.9	1.6	0.4	84.3	11.8%
Retail warehousing / foodstores, Nuneaton	0.5	0.4	8.4	0.7	0.0	0.1	0.2	10.3	1.4%
Sub-total, Nuneaton	12.1	5.1	62.0	10.2	2.9	1.7	0.6	94.6	13.2%
Coventry									
Coventry city centre	2.7	2.5	10.2	1.8	0.6	0.2	0.1	18.1	2.5%
Retail warehousing / foodstores, Coventry	0.5	3.0	5.3	0.8	0.0	0.9	0.4	10.9	1.5%
Sub-total, Coventry	3.2	5.4	15.5	2.5	0.7	1.1	0.5	29.0	4.1%
Other locations									
Birmingham	1.7	0.4	2.8	0.5	0.7	0.0	0.4	6.4	0.9%
Tamworth	1.2	0.3	2.4	0.4	1.7	0.0	0.2	6.2	0.9%
Coalville	0.0	0.1	0.0	0.2	4.4	0.0	0.0	4.6	0.6%
All other locations outside survey area	1.1	1.9	3.4	2.1	4.1	1.8	6.4	20.8	2.9%
Sub-total, other locations	3.9	2.6	8.6	3.1	10.8	1.8	7.0	37.9	5.3%
Sub-total, comparison goods floorspace outside survey area (B)	77.6	44.8	100.6	47.2	66.9	25.7	79.0	441.8	61.8%
Local / small shops in survey area (C)	1.2	4.2	1.2	0.5	2.2	0.1	4.1	13.5	1.9%
OVERALL TOTAL (A+B+C)	165.7	102.5	104.2	86.8	81.4	62.0	112.1	714.8	100.0%

Source: Table 3, Table 4

Hinckley & Bosworth Borough Council — Town & District Centres Study 2016
Comparison capacity modelling

Table 5e: Comparison goods allocation 2036 - spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Total (£m)	Total (%)
Total available comparison goods spend — 2036	202.0	123.1	124.4	104.6	96.9	75.3	136.5	862.7	100.0
Comparison goods floorspace in Hinckley & Bosworth									
Hinckley town centre									
Hinckley town centre (zone 1)	76.9	49.8	1.4	28.9	10.1	25.8	24.8	217.8	25.2%
Sainsbury's, Rugby Road, Hinckley (zone 1)	1.7	1.2	0.3	2.9	0.1	1.2	0.0	7.5	0.9%
Sub-total, Hinckley town centre	78.6	51.0	1.7	31.8	10.2	27.1	24.8	225.2	26.1%
Out-of-centre retail warehousing									
Out-of-centre retail warehousing, Hinckley (zone 1)	13.3	5.0	0.9	4.0	3.0	4.0	5.7	36.0	4.2%
Out-of-centre foodstores, Hinckley (zone 1)	12.5	8.0	0.2	7.2	1.3	7.5	4.6	41.4	4.8%
Sub-total, Hinckley out-of-centre floorspace	25.8	13.0	1.1	11.3	4.3	11.5	10.2	77.3	9.0%
Other locations in Hinckley & Bosworth Borough									
Barwell (zone 4)	0.2	0.0	0.0	2.6	0.0	0.0	0.1	3.0	0.3%
Earl Shilton (zone 6)	1.2	0.2	0.1	1.5	0.1	5.3	0.0	8.4	1.0%
Sub-total, other locations in Hinckley & Bosworth Borough	1.4	0.2	0.1	4.1	0.1	5.3	0.1	11.4	1.3%
Sub-total, comparison goods floorspace in H&B (A)	105.8	64.3	2.9	47.2	14.7	43.9	35.2	314.0	36.4%
Comparison goods floorspace outside Hinckley & Bosworth Borough /outside survey area									
Leicester									
Leicester city centre	34.6	13.0	7.1	15.0	26.9	7.6	26.8	131.1	15.2%
Fosse Park (incl. Sainsbury's / Asda foodstores)	36.6	24.9	9.9	22.7	32.3	17.7	57.9	202.0	23.4%
Other retail warehousing / foodstores, Leicester	0.0	0.0	0.3	0.0	3.3	0.3	1.6	5.5	0.6%
Sub-total, Leicester	71.2	38.0	17.3	37.7	62.5	25.6	86.3	338.6	39.2%
Nuneaton									
Nuneaton town centre	14.1	5.7	63.9	11.5	3.5	1.9	0.5	101.1	11.7%
Retail warehousing / foodstores, Nuneaton	0.6	0.5	10.0	0.8	0.0	0.1	0.3	12.3	1.4%
Sub-total, Nuneaton	14.8	6.2	74.0	12.3	3.5	2.0	0.7	113.4	13.1%
Coventry									
Coventry city centre	3.3	3.0	12.1	2.2	0.8	0.3	0.1	21.7	2.5%
Retail warehousing / foodstores, Coventry	0.6	3.6	6.4	0.9	0.0	1.1	0.5	13.1	1.5%
Sub-total, Coventry	3.8	6.5	18.5	3.1	0.8	1.4	0.6	34.8	4.0%
Other locations									
Birmingham	2.0	0.5	3.3	0.6	0.8	0.0	0.5	7.7	0.9%
Tamworth	1.4	0.4	2.9	0.5	2.0	0.0	0.3	7.4	0.9%
Coalville	0.0	0.1	0.0	0.2	5.2	0.0	0.0	5.5	0.6%
All other locations outside survey area	1.3	2.2	4.1	2.5	4.9	2.2	7.8	25.1	2.9%
Sub-total, other locations	4.8	3.1	10.3	3.7	12.9	2.2	8.6	45.6	5.3%
Sub-total, comparison goods floorspace outside survey area (B)	94.6	53.8	120.1	56.8	79.6	31.2	96.2	532.4	61.7%
Local / small shops in survey area (C)	1.5	5.0	1.5	0.5	2.6	0.1	5.0	16.3	1.9%
OVERALL TOTAL (A+B+C)	202.0	123.1	124.4	104.6	96.9	75.3	136.5	862.7	100.0%

Source: Table 3, Table 4

Hinckley & Bosworth Borough Council — Town & District Centres Study 2016
 Comparison capacity modelling

Table 6: Schedule of comparison goods floorspace

In-centre floorspace	Comparison goods floorspace (sq.m net)
Hinckley town centre	24,652
Earl Shilton	1,724
Total in-centre floorspace	26,376

Edge/Out-of-centre floorspace	Comparison goods floorspace (sq.m net)
Hawley Road Retail Park, Hinckley	2,083
Hinckley Retail Park, Stoke Road (Halfords / Wickes)	2,407
B&Q, New Buildings, Hinckley	2,048
Total out-of-centre floorspace	6,538

Overall total (sq.m net)	32,914
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Source: Experian Goad Category Reports. Note: no Experian data available for Barwell.
 Retail park floorspace data sourced from planning applications / Promap
 Foodstore floorspace data sourced from IGD

Hinckley & Bosworth Borough Council — Town & District Centres Study 2016
Comparison capacity modelling

Table 7: Commitments for new comparison goods floorspace

Proposed development	Net Comparison Floorspace (sq.m)	Company Average Sales (£/sq.m net)	Average turnover 2021 (£m)	Average turnover 2026 (£m)	Average turnover 2031 (£m)	Average turnover 2036 (£m)
(No commitments)	-	-	0.0	0.0	0.0	0.0
Total	-	-	0.0	0.0	0.0	0.0

Source: Hinckley & Bosworth Borough Council planning application monitoring

Hinckley & Bosworth Borough Council — Town & District Centres Study 2016
Comparison capacity modelling

Table 8: District-wide comparison goods floorspace capacity (REDUCED MARKET SHARE)

	2016	2021	2026	2031*	2036*
Total Available Expenditure (£m)	440.5	503.3	598.9	714.8	862.7
Market Share from Survey Area (%)	36	36	36	36	36
Comparison goods spending in Hinckley town centre (£m) (adjusted for Castle Acres)	114.5	129.0	153.8	184.1	223.1
Comparison goods spending in other centres (£m)	5.8	6.6	7.9	9.5	11.4
Comparison goods spending in retail parks / out-of-centre foodstores (£m) (adjusted for Castle Acres)	39.3	44.7	53.2	63.7	77.1
Total comparison goods spending (£m)	159.6	180.3	215.0	257.3	311.7
Existing Retail Floorspace (sq.m net)	32,914	32,914	32,914	32,914	32,914
Sales per sq.m net (£)	4,849	5,198	5,572	5,572	5,973
Sales from Existing Floorspace (£m)	159.6	171.1	183.4	183.4	196.6
Sales from Committed Floorspace (£m)	0.0	0.0	0.0	0.0	0.0
Residual Spending to support new floorspace (£000)	0.0	9.2	31.6	73.9	115.1
Sales per sq.m net in new shops (£)	6,000	6,432	6,895	7,391	7,923
Capacity for new floorspace (sq.m net)	0	1,434	4,581	9,996	14,529
Capacity for new floorspace (sq.m net, rounded)	0	1,400	4,600	10,000	14,500

Assumes growth in sales efficiency of 1.4% per annum to 2036 (source: Experian Retail Planner 14)

*indicative forecasts, should be subject to further review throughout Local Plan period.

CONVENIENCE GOODS MODELLING

Hinckley & Bosworth Borough Council — Town & District Centres Study 2016
 Convenience goods capacity forecasts

Table 1: Population forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
2015	32,224	17,518	16,884	16,141	13,520	12,218	19,557	128,062
2016	32,436	17,610	16,975	16,270	13,600	12,307	19,694	128,892
2021	33,598	18,074	17,388	16,806	14,062	12,699	20,319	132,946
2026	34,664	18,450	17,708	17,286	14,463	13,040	20,898	136,509
2031	35,630	18,772	17,946	17,657	14,712	13,400	21,458	139,575
2033	37,181	19,300	18,348	18,206	14,997	13,940	22,373	144,345
Change 2016-33	4,745	1,690	1,373	1,936	1,397	1,633	2,679	15,453

Source: Experian Micromarketer, 2014-based population projections

Survey area postcode sectors

Zone	Postal Sectors
Zone 1	LE10 0 / LE10 1
Zone 2	LE10 2 / LE10 3
Zone 3	CV11 6
Zone 4	LE9 8 / CV13 6
Zone 5	LE9 9 / CV13 0
Zone 6	LE9 7
Zone 7	LE9 3 / LE9 4 / LE9 6

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Table 2: Convenience goods per capita expenditure by survey zone (2014 prices)

	Zone 1 (£)	Zone 2 (£)	Zone 3 (£)	Zone 4 (£)	Zone 5 (£)	Zone 6 (£)	Zone 7 (£)	Zone 8 (£)
2014	2,081	2,224	2,349	2,171	2,301	2,080	2,077	2,319
2016	2,023	2,163	2,283	2,111	2,237	2,022	2,020	2,255
2016 Minus SFT at 3.0%	1,962	2,098	2,215	2,048	2,170	1,961	1,959	2,187
2021	2,000	2,139	2,258	2,088	2,212	2,000	1,997	2,230
2021 Minus SFT at 3.9%	1,922	2,055	2,170	2,006	2,126	1,922	1,919	2,143
2026	2,006	2,145	2,265	2,094	2,219	2,006	2,003	2,237
2026 Minus SFT at 4.6%	1,914	2,047	2,161	1,998	2,117	1,913	1,911	2,134
2031	2,017	2,156	2,276	2,105	2,230	2,016	2,013	2,248
2031 Minus SFT at 5.0%	1,916	2,048	2,163	1,999	2,119	1,915	1,913	2,135
2036	2,027	2,167	2,288	2,115	2,241	2,026	2,024	2,259
2036 Minus SFT at 5.3%	1,919	2,052	2,167	2,003	2,123	1,918	1,916	2,139

Expenditure growth rates: 2014-15: -1.8% / 2015-16: -0.2% / 2016-17: +0.1% / 2017-18: +0.3% / 2018-36: +0.1% per annum

Source: Experian E-Marketer, October 2014. Growth rates and allowance for SFT are derived from Experian Retail Planner 12.1

Table 3: Total convenience goods expenditure available to survey area (2014 prices)

	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Total (£m)
2016	63.6	36.9	37.6	33.3	29.5	24.1	38.6	263.7
2021	64.6	37.1	37.7	33.7	29.9	24.4	39.0	266.5
2026	66.4	37.8	38.3	34.5	30.6	24.9	39.9	272.4
2031	68.3	38.4	38.8	35.3	31.2	25.7	41.0	278.7
2036	71.4	39.6	39.8	36.5	31.8	26.7	42.9	288.6
Change 2016-36	7.7	2.7	2.2	3.2	2.3	2.6	4.3	24.9

Source: Tables 1 & 2

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Table 4: Convenience goods allocation 2016 (% market share)

Zone Centre/Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)
Convenience goods floorspace in Hinckley & Bosworth Borough							
Hinckley town centre foodstores							
Sainsbury's, Rugby Road, Hinckley (zone 1)	8.0%	11.4%	1.8%	6.1%	3.2%	6.1%	4.1%
Iceland, Waterloo Road, Hinckley (zone 1)	1.0%	0.9%	0.0%	0.0%	0.4%	1.9%	0.1%
Other stores, Hinckley town centre (zone 1)	5.4%	4.9%	0.2%	2.0%	2.4%	3.6%	0.3%
Sub-total, Hinckley town centre foodstores	14.5%	17.2%	2.1%	8.1%	6.0%	11.6%	4.5%
Edge/out-of-centre foodstores in Hinckley							
Asda, Barwell Lane, Hinckley (zone 1)	28.1%	7.3%	0.0%	19.6%	4.9%	18.4%	8.7%
Morrisons, Normandy Way, Hinckley (zone 1)	13.8%	6.0%	2.4%	29.7%	12.2%	14.0%	5.5%
Tesco, Station Yard, Hinckley (zone 1)	9.0%	29.7%	0.0%	1.1%	1.6%	4.5%	2.8%
Aldi, Watling Street, Hinckley (zone 2)	17.1%	3.2%	5.7%	6.4%	2.7%	8.4%	1.9%
Lidl, Hawley Road, Hinckley (zone 1)	5.8%	9.3%	0.5%	3.6%	1.0%	5.4%	2.7%
Sainsbury's Local, Clifton Way, Hinckley (zone 1)	5.6%	0.2%	0.3%	1.4%	0.8%	0.6%	0.6%
Tesco Express, London Road, Hinckley (zone 1)	1.8%	2.3%	0.0%	0.5%	0.0%	0.7%	0.6%
Sub-total, edge/out-of-centre stores in Hinckley	81.3%	57.9%	8.9%	62.3%	23.2%	52.0%	22.7%
Barwell & Earl Shilton foodstores							
Co-Op, Wood Street, Earl Shilton (zone 6)	0.8%	0.0%	0.0%	8.3%	0.2%	27.1%	0.0%
Other stores, Earl Shilton (zone 6)	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%
Other stores, Barwell (zone 4)	0.0%	0.5%	0.0%	6.4%	0.3%	0.6%	0.0%
Sub-total, Barwell & Earl Shilton foodstores	0.8%	0.5%	0.0%	14.7%	0.4%	30.3%	0.0%
Market Bosworth foodstores							
Co-Op, Main Street, Market Bosworth (zone 5)	0.0%	0.0%	0.0%	0.3%	6.8%	0.0%	0.0%
Sub-total, Market Bosworth foodstores	0.0%	0.0%	0.0%	0.3%	6.8%	0.0%	0.0%
Other foodstores							
Co-Op, Boystade Road, Burbage, Hinckley (zone 2)	0.6%	9.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-Op, 23 Newbold Road, Desford, Leicester (zone 5)	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%	0.0%
Co-Op, West End, Barlestone (zone 5)	0.0%	0.0%	0.2%	1.4%	4.3%	0.0%	0.0%
Co-Op, Main Street, Newbold Verdon (zone 5)	0.0%	0.0%	0.0%	0.0%	4.1%	1.0%	1.2%
Sub-total, other foodstores	0.6%	9.6%	0.2%	1.4%	13.2%	1.0%	1.2%
Sub-total, convenience goods floorspace in Hinckley & Bosworth (A)	97.1%	85.2%	11.2%	86.6%	49.7%	94.9%	28.5%
Convenience goods floorspace outside Hinckley & Bosworth (outside survey area)							
Nuneaton foodstores	0.7%	3.2%	71.3%	5.2%	2.8%	1.2%	2.2%
Leicester foodstores	0.3%	1.7%	1.6%	0.9%	18.3%	3.0%	29.8%
Bedworth foodstores	0.0%	0.0%	9.9%	0.0%	0.0%	0.0%	0.0%
Coalville / Ibstock foodstores	0.0%	0.0%	0.6%	0.5%	20.3%	0.0%	0.0%
Lutterworth foodstores	0.7%	0.4%	0.0%	0.0%	0.0%	0.0%	8.5%
Blaby foodstores	0.3%	0.0%	0.0%	0.0%	0.0%	0.4%	5.1%
All other locations outside survey area	0.0%	4.6%	3.4%	3.7%	4.5%	0.0%	4.8%
Sub-total, convenience goods floorspace outside survey area (B)	2.0%	9.9%	86.8%	10.3%	45.8%	4.6%	50.5%
Local / small shops in survey area (C)	0.9%	4.9%	2.0%	3.1%	4.5%	0.5%	21.1%
OVERALL TOTAL (A+B+C)	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NEMS Market Research Telephone Survey, April 2016

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Table 5a: Convenience goods allocation 2016 - Spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Total (£m)	Total (%)
Total available convenience goods spend — 2016	63.6	36.9	37.6	33.3	29.5	24.1	38.6	263.7	100.0
Convenience goods floorspace in Hinckley & Bosworth Borough									
Hinckley town centre foodstores									
Sainsbury's, Rugby Road, Hinckley (zone 1)	5.1	4.2	0.7	2.0	0.9	1.5	1.6	16.0	6.1%
Iceland, Waterloo Road, Hinckley (zone 1)	0.7	0.3	0.0	0.0	0.1	0.5	0.1	1.6	0.6%
Other stores, Hinckley town centre (zone 1)	3.4	1.8	0.1	0.7	0.7	0.9	0.1	7.7	2.9%
Sub-total, Hinckley town centre foodstores	9.2	6.3	0.8	2.7	1.8	2.8	1.7	25.3	9.6%
Edge/out-of-centre foodstores in Hinckley									
Asda, Barwell Lane, Hinckley (zone 1)	17.9	2.7	0.0	6.5	1.5	4.4	3.4	36.4	13.8%
Morrisons, Normandy Way, Hinckley (zone 1)	8.8	2.2	0.9	9.9	3.6	3.4	2.1	30.9	11.7%
Tesco, Station Yard, Hinckley (zone 1)	5.7	11.0	0.0	0.4	0.5	1.1	1.1	19.7	7.5%
Aldi, Watling Street, Hinckley (zone 2)	10.9	1.2	2.2	2.1	0.8	2.0	0.7	19.9	7.6%
Lidl, Hawley Road, Hinckley (zone 1)	3.7	3.4	0.2	1.2	0.3	1.3	1.0	11.2	4.2%
Sainsbury's Local, Clifton Way, Hinckley (zone 1)	3.5	0.1	0.1	0.5	0.2	0.1	0.2	4.8	1.8%
Tesco Express, London Road, Hinckley (zone 1)	1.2	0.9	0.0	0.2	0.0	0.2	0.2	2.6	1.0%
Sub-total, edge/out-of-centre stores in Hinckley	51.7	21.4	3.4	20.7	6.9	12.5	8.8	125.4	47.6%
Barwell & Earl Shilton foodstores									
Co-Op, Wood Street, Earl Shilton (zone 6)	0.5	0.0	0.0	2.8	0.0	6.5	0.0	9.9	3.7%
Other stores, Earl Shilton (zone 6)	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.6	0.2%
Other stores, Barwell (zone 4)	0.0	0.2	0.0	2.1	0.1	0.2	0.0	2.5	1.0%
Sub-total, Barwell & Earl Shilton foodstores	0.5	0.2	0.0	4.9	0.1	7.3	0.0	13.0	4.9%
Market Bosworth foodstores									
Co-Op, Main Street, Market Bosworth (zone 5)	0.0	0.0	0.0	0.1	2.0	0.0	0.0	2.1	0.8%
Sub-total, Market Bosworth foodstores	0.0	0.0	0.0	0.1	2.0	0.0	0.0	2.1	0.8%
Other foodstores									
Co-Op, Boystade Road, Burbage, Hinckley (zone 2)	0.4	3.6	0.0	0.0	0.0	0.0	0.0	3.9	1.5%
Co-Op, 23 Newbold Road, Desford, Leicester (zone 5)	0.0	0.0	0.0	0.0	1.4	0.0	0.0	1.4	0.5%
Co-Op, West End, Barlestone (zone 5)	0.0	0.0	0.1	0.5	1.3	0.0	0.0	1.8	0.7%
Co-Op, Main Street, Newbold Verdon (zone 5)	0.0	0.0	0.0	0.0	1.2	0.2	0.5	1.9	0.7%
Sub-total, other foodstores	0.4	3.6	0.1	0.5	3.9	0.2	0.5	9.1	3.4%
Sub-total, convenience goods floorspace in Hinckley & Bosworth (A)	61.8	31.5	4.2	28.9	14.7	22.9	11.0	174.9	66.3%
Convenience goods floorspace outside Hinckley & Bosworth Borough (outside survey area)									
Nuneaton foodstores	0.4	1.2	26.8	1.7	0.8	0.3	0.9	32.1	12.2%
Leicester foodstores	0.2	0.6	0.6	0.3	5.4	0.7	11.5	19.4	7.3%
Bedworth foodstores	0.0	0.0	3.7	0.0	0.0	0.0	0.0	3.7	1.4%
Coalville / Ibstock foodstores	0.0	0.0	0.2	0.2	6.0	0.0	0.0	6.4	2.4%
Lutterworth foodstores	0.5	0.2	0.0	0.0	0.0	0.0	3.3	3.9	1.5%
Blaby foodstores	0.2	0.0	0.0	0.0	0.0	0.1	2.0	2.2	0.8%
All other locations outside survey area	0.0	1.7	1.3	1.2	1.3	0.0	1.8	7.4	2.8%
Sub-total, convenience goods floorspace outside survey area (B)	1.3	3.7	32.6	3.4	13.5	1.1	19.5	75.1	28.5%
Local / small shops in survey area (C)	0.6	1.8	0.8	1.0	1.3	0.1	8.1	13.7	5.2%
OVERALL TOTAL (A+B+C)	63.6	36.9	37.6	33.3	29.5	24.1	38.6	263.7	100.0%

Source: Table 3, Table 4

Hinckley & Bosworth Borough Council — Town & District Centres Study 2016
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Table 5b: Convenience goods allocation 2021 - Spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Total (£m)	Total (%)
Total available convenience goods spend — 2021	64.6	37.1	37.7	33.7	29.9	24.4	39.0	266.5	100.0
Convenience goods floorspace in Hinckley & Bosworth Borough									
Hinckley town centre foodstores									
Sainsbury's, Rugby Road, Hinckley (zone 1)	5.2	4.2	0.7	2.1	1.0	1.5	1.6	16.2	6.1%
Iceland, Waterloo Road, Hinckley (zone 1)	0.7	0.3	0.0	0.0	0.1	0.5	0.1	1.6	0.6%
Other stores, Hinckley town centre (zone 1)	3.5	1.8	0.1	0.7	0.7	0.9	0.1	7.8	2.9%
Sub-total, Hinckley town centre foodstores	9.3	6.4	0.8	2.7	1.8	2.8	1.8	25.6	9.6%
Edge/out-of-centre foodstores in Hinckley									
Asda, Barwell Lane, Hinckley (zone 1)	18.2	2.7	0.0	6.6	1.5	4.5	3.4	36.9	13.8%
Morrisons, Normandy Way, Hinckley (zone 1)	8.9	2.2	0.9	10.0	3.6	3.4	2.2	31.3	11.7%
Tesco, Station Yard, Hinckley (zone 1)	5.8	11.0	0.0	0.4	0.5	1.1	1.1	19.8	7.4%
Aldi, Watling Street, Hinckley (zone 2)	11.1	1.2	2.2	2.2	0.8	2.1	0.7	20.2	7.6%
Lidl, Hawley Road, Hinckley (zone 1)	3.8	3.4	0.2	1.2	0.3	1.3	1.1	11.3	4.2%
Sainsbury's Local, Clifton Way, Hinckley (zone 1)	3.6	0.1	0.1	0.5	0.2	0.1	0.2	4.9	1.8%
Tesco Express, London Road, Hinckley (zone 1)	1.2	0.9	0.0	0.2	0.0	0.2	0.2	2.6	1.0%
Sub-total, edge/out-of-centre stores in Hinckley	52.5	21.5	3.4	21.0	6.9	12.7	8.9	126.9	47.6%
Barwell & Earl Shilton foodstores									
Co-Op, Wood Street, Earl Shilton (zone 6)	0.5	0.0	0.0	2.8	0.0	6.6	0.0	10.0	3.7%
Other stores, Earl Shilton (zone 6)	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.6	0.2%
Other stores, Barwell (zone 4)	0.0	0.2	0.0	2.1	0.1	0.2	0.0	2.6	1.0%
Sub-total, Barwell & Earl Shilton foodstores	0.5	0.2	0.0	4.9	0.1	7.4	0.0	13.2	4.9%
Market Bosworth foodstores									
Co-Op, Main Street, Market Bosworth (zone 5)	0.0	0.0	0.0	0.1	2.0	0.0	0.0	2.1	0.8%
Sub-total, Market Bosworth foodstores	0.0	0.0	0.0	0.1	2.0	0.0	0.0	2.1	0.8%
Other foodstores									
Co-Op, Boystade Road, Burbage, Hinckley (zone 2)	0.4	3.6	0.0	0.0	0.0	0.0	0.0	3.9	1.5%
Co-Op, 23 Newbold Road, Desford, Leicester (zone 5)	0.0	0.0	0.0	0.0	1.4	0.0	0.0	1.4	0.5%
Co-Op, West End, Barlestone (zone 5)	0.0	0.0	0.1	0.5	1.3	0.0	0.0	1.8	0.7%
Co-Op, Main Street, Newbold Verdon (zone 5)	0.0	0.0	0.0	0.0	1.2	0.2	0.5	2.0	0.7%
Sub-total, other foodstores	0.4	3.6	0.1	0.5	3.9	0.2	0.5	9.2	3.4%
Sub-total, convenience goods floorspace in Hinckley & Bosworth (A)	62.7	31.7	4.2	29.2	14.9	23.2	11.1	177.0	66.4%
Convenience goods floorspace outside Hinckley & Bosworth (outside survey area)									
Nuneaton foodstores	0.4	1.2	26.9	1.8	0.8	0.3	0.9	32.3	12.1%
Leicester foodstores	0.2	0.6	0.6	0.3	5.5	0.7	11.6	19.6	7.3%
Bedworth foodstores	0.0	0.0	3.7	0.0	0.0	0.0	0.0	3.7	1.4%
Coalville / Ibstock foodstores	0.0	0.0	0.2	0.2	6.1	0.0	0.0	6.4	2.4%
Lutterworth foodstores	0.5	0.2	0.0	0.0	0.0	0.0	3.3	4.0	1.5%
Blaby foodstores	0.2	0.0	0.0	0.0	0.0	0.1	2.0	2.2	0.8%
All other locations outside survey area	0.0	1.7	1.3	1.3	1.3	0.0	1.9	7.5	2.8%
Sub-total, convenience goods floorspace outside survey area (B)	1.3	3.7	32.7	3.5	13.7	1.1	19.7	75.7	28.4%
Local / small shops in survey area (C)	0.6	1.8	0.8	1.0	1.3	0.1	8.2	13.9	5.2%
OVERALL TOTAL (A+B+C)	64.6	37.1	37.7	33.7	29.9	24.4	39.0	266.5	100.0%

Source: Table 3, Table 4

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Table 5c: Convenience goods allocation 2026 - Spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Total (£m)	Total (%)
Total available convenience goods spend — 2026	66.4	37.8	38.3	34.5	30.6	24.9	39.9	272.4	100.0
Convenience goods floorspace in Hinckley & Bosworth Borough									
Hinckley town centre foodstores									
Sainsbury's, Rugby Road, Hinckley (zone 1)	5.3	4.3	0.7	2.1	1.0	1.5	1.7	16.6	6.1%
Iceland, Waterloo Road, Hinckley (zone 1)	0.7	0.3	0.0	0.0	0.1	0.5	0.1	1.7	0.6%
Other stores, Hinckley town centre (zone 1)	3.6	1.9	0.1	0.7	0.7	0.9	0.1	8.0	2.9%
Sub-total, Hinckley town centre foodstores	9.6	6.5	0.8	2.8	1.8	2.9	1.8	26.2	9.6%
Edge/out-of-centre foodstores in Hinckley									
Asda, Barwell Lane, Hinckley (zone 1)	18.7	2.8	0.0	6.8	1.5	4.6	3.5	37.8	13.9%
Morrisons, Normandy Way, Hinckley (zone 1)	9.2	2.3	0.9	10.3	3.7	3.5	2.2	32.0	11.8%
Tesco, Station Yard, Hinckley (zone 1)	6.0	11.2	0.0	0.4	0.5	1.1	1.1	20.3	7.4%
Aldi, Watling Street, Hinckley (zone 2)	11.4	1.2	2.2	2.2	0.8	2.1	0.7	20.7	7.6%
Lidl, Hawley Road, Hinckley (zone 1)	3.9	3.5	0.2	1.2	0.3	1.3	1.1	11.5	4.2%
Sainsbury's Local, Clifton Way, Hinckley (zone 1)	3.7	0.1	0.1	0.5	0.2	0.1	0.2	5.0	1.8%
Tesco Express, London Road, Hinckley (zone 1)	1.2	0.9	0.0	0.2	0.0	0.2	0.2	2.6	1.0%
Sub-total, edge/out-of-centre stores in Hinckley	53.9	21.9	3.4	21.5	7.1	13.0	9.1	129.9	47.7%
Barwell & Earl Shilton foodstores									
Co-Op, Wood Street, Earl Shilton (zone 6)	0.5	0.0	0.0	2.9	0.0	6.8	0.0	10.2	3.7%
Other stores, Earl Shilton (zone 6)	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.6	0.2%
Other stores, Barwell (zone 4)	0.0	0.2	0.0	2.2	0.1	0.2	0.0	2.6	1.0%
Sub-total, Barwell & Earl Shilton foodstores	0.5	0.2	0.0	5.1	0.1	7.6	0.0	13.5	4.9%
Market Bosworth foodstores									
Co-Op, Main Street, Market Bosworth (zone 5)	0.0	0.0	0.0	0.1	2.1	0.0	0.0	2.2	0.8%
Sub-total, Market Bosworth foodstores	0.0	0.0	0.0	0.1	2.1	0.0	0.0	2.2	0.8%
Other foodstores									
Co-Op, Boystade Road, Burbage, Hinckley (zone 2)	0.4	3.6	0.0	0.0	0.0	0.0	0.0	4.0	1.5%
Co-Op, 23 Newbold Road, Desford, Leicester (zone 5)	0.0	0.0	0.0	0.0	1.5	0.0	0.0	1.5	0.5%
Co-Op, West End, Barlestone (zone 5)	0.0	0.0	0.1	0.5	1.3	0.0	0.0	1.9	0.7%
Co-Op, Main Street, Newbold Verdon (zone 5)	0.0	0.0	0.0	0.0	1.3	0.2	0.5	2.0	0.7%
Sub-total, other foodstores	0.4	3.6	0.1	0.5	4.0	0.2	0.5	9.4	3.4%
Sub-total, convenience goods floorspace in Hinckley & Bosworth (A)	64.4	32.2	4.3	29.9	15.2	23.7	11.4	181.1	66.5%
Convenience goods floorspace outside Hinckley & Bosworth (outside survey area)									
Nuneaton foodstores	0.4	1.2	27.3	1.8	0.9	0.3	0.9	32.8	12.0%
Leicester foodstores	0.2	0.6	0.6	0.3	5.6	0.8	11.9	20.0	7.4%
Bedworth foodstores	0.0	0.0	3.8	0.0	0.0	0.0	0.0	3.8	1.4%
Coalville / Ibstock foodstores	0.0	0.0	0.2	0.2	6.2	0.0	0.0	6.6	2.4%
Lutterworth foodstores	0.5	0.2	0.0	0.0	0.0	0.0	3.4	4.1	1.5%
Blaby foodstores	0.2	0.0	0.0	0.0	0.0	0.1	2.0	2.3	0.8%
All other locations outside survey area	0.0	1.7	1.3	1.3	1.4	0.0	1.9	7.6	2.8%
Sub-total, convenience goods floorspace outside survey area (B)	1.3	3.7	33.2	3.6	14.0	1.1	20.2	77.1	28.3%
Local / small shops in survey area (C)	0.6	1.8	0.8	1.1	1.4	0.1	8.4	14.2	5.2%
OVERALL TOTAL (A+B+C)	66.4	37.8	38.3	34.5	30.6	24.9	39.9	272.4	100.0%

Source: Table 3, Table 4

Hinckley & Bosworth Borough Council — Town & District Centres Study 2016
 Convenience goods capacity forecasts

Table 5d: Convenience goods allocation 2031 - Spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Total (£m)	Total (%)
Total available convenience goods spend — 2031	68.3	38.4	38.8	35.3	31.2	25.7	41.0	278.7	100.0
Convenience goods floorspace in Hinckley & Bosworth Borough									
Hinckley town centre foodstores									
Sainsbury's, Rugby Road, Hinckley (zone 1)	5.5	4.4	0.7	2.2	1.0	1.6	1.7	17.0	6.1%
Iceland, Waterloo Road, Hinckley (zone 1)	0.7	0.3	0.0	0.0	0.1	0.5	0.1	1.7	0.6%
Other stores, Hinckley town centre (zone 1)	3.7	1.9	0.1	0.7	0.8	0.9	0.1	8.1	2.9%
Sub-total, Hinckley town centre foodstores	9.9	6.6	0.8	2.8	1.9	3.0	1.9	26.8	9.6%
Edge/out-of-centre foodstores in Hinckley									
Asda, Barwell Lane, Hinckley (zone 1)	19.2	2.8	0.0	6.9	1.5	4.7	3.6	38.8	13.9%
Morrisons, Normandy Way, Hinckley (zone 1)	9.4	2.3	0.9	10.5	3.8	3.6	2.3	32.8	11.8%
Tesco, Station Yard, Hinckley (zone 1)	6.1	11.4	0.0	0.4	0.5	1.2	1.1	20.7	7.4%
Aldi, Watling Street, Hinckley (zone 2)	11.7	1.2	2.2	2.3	0.8	2.2	0.8	21.2	7.6%
Lidl, Hawley Road, Hinckley (zone 1)	4.0	3.6	0.2	1.3	0.3	1.4	1.1	11.8	4.2%
Sainsbury's Local, Clifton Way, Hinckley (zone 1)	3.8	0.1	0.1	0.5	0.2	0.2	0.2	5.1	1.8%
Tesco Express, London Road, Hinckley (zone 1)	1.3	0.9	0.0	0.2	0.0	0.2	0.2	2.7	1.0%
Sub-total, edge/out-of-centre stores in Hinckley	55.5	22.3	3.5	22.0	7.2	13.3	9.3	133.1	47.8%
Barwell & Earl Shilton foodstores									
Co-Op, Wood Street, Earl Shilton (zone 6)	0.5	0.0	0.0	2.9	0.0	7.0	0.0	10.5	3.8%
Other stores, Earl Shilton (zone 6)	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.7	0.2%
Other stores, Barwell (zone 4)	0.0	0.2	0.0	2.2	0.1	0.2	0.0	2.7	1.0%
Sub-total, Barwell & Earl Shilton foodstores	0.5	0.2	0.0	5.2	0.1	7.8	0.0	13.8	5.0%
Market Bosworth foodstores									
Co-Op, Main Street, Market Bosworth (zone 5)	0.0	0.0	0.0	0.1	2.1	0.0	0.0	2.2	0.8%
Sub-total, Market Bosworth foodstores	0.0	0.0	0.0	0.1	2.1	0.0	0.0	2.2	0.8%
Other foodstores									
Co-Op, Boystade Road, Burbage, Hinckley (zone 2)	0.4	3.7	0.0	0.0	0.0	0.0	0.0	4.1	1.5%
Co-Op, 23 Newbold Road, Desford, Leicester (zone 5)	0.0	0.0	0.0	0.0	1.5	0.0	0.0	1.5	0.5%
Co-Op, West End, Barlestone (zone 5)	0.0	0.0	0.1	0.5	1.3	0.0	0.0	1.9	0.7%
Co-Op, Main Street, Newbold Verdon (zone 5)	0.0	0.0	0.0	0.0	1.3	0.3	0.5	2.0	0.7%
Sub-total, other foodstores	0.4	3.7	0.1	0.5	4.1	0.3	0.5	9.5	3.4%
Sub-total, convenience goods floorspace in Hinckley & Bosworth (A)	66.3	32.8	4.4	30.6	15.5	24.4	11.7	185.5	66.6%
Convenience goods floorspace outside Hinckley & Bosworth (outside survey area)									
Nuneaton foodstores	0.4	1.2	27.7	1.9	0.9	0.3	0.9	33.3	11.9%
Leicester foodstores	0.2	0.7	0.6	0.3	5.7	0.8	12.2	20.5	7.4%
Bedworth foodstores	0.0	0.0	3.8	0.0	0.0	0.0	0.0	3.8	1.4%
Coalville / Ibstock foodstores	0.0	0.0	0.2	0.2	6.3	0.0	0.0	6.7	2.4%
Lutterworth foodstores	0.5	0.2	0.0	0.0	0.0	0.0	3.5	4.2	1.5%
Blaby foodstores	0.2	0.0	0.0	0.0	0.0	0.1	2.1	2.4	0.8%
All other locations outside survey area	0.0	1.8	1.3	1.3	1.4	0.0	2.0	7.8	2.8%
Sub-total, convenience goods floorspace outside survey area (B)	1.4	3.8	33.7	3.6	14.3	1.2	20.7	78.6	28.2%
Local / small shops in survey area (C)	0.6	1.9	0.8	1.1	1.4	0.1	8.6	14.5	5.2%
OVERALL TOTAL (A+B+C)	68.3	38.4	38.8	35.3	31.2	25.7	41.0	278.7	100.0%

Source: Table 3, Table 4

Hinckley & Bosworth Borough Council — Town & District Centres Study 2016
 Convenience goods capacity forecasts

Table 5e: Convenience goods allocation 2036 - Spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Total (£m)	Total (%)
Total available convenience goods spend — 2036	71.4	39.6	39.8	36.5	31.8	26.7	42.9	288.6	100.0
Convenience goods floorspace in Hinckley & Bosworth Borough									
Hinckley town centre foodstores									
Sainsbury's, Rugby Road, Hinckley (zone 1)	5.7	4.5	0.7	2.2	1.0	1.6	1.8	17.6	6.1%
Iceland, Waterloo Road, Hinckley (zone 1)	0.7	0.4	0.0	0.0	0.1	0.5	0.1	1.8	0.6%
Other stores, Hinckley town centre (zone 1)	3.9	1.9	0.1	0.7	0.8	1.0	0.1	8.5	2.9%
Sub-total, Hinckley town centre foodstores	10.3	6.8	0.8	2.9	1.9	3.1	1.9	27.8	9.6%
Edge/out-of-centre foodstores in Hinckley									
Asda, Barwell Lane, Hinckley (zone 1)	20.1	2.9	0.0	7.2	1.6	4.9	3.7	40.4	14.0%
Morrisons, Normandy Way, Hinckley (zone 1)	9.8	2.4	0.9	10.8	3.9	3.7	2.4	34.0	11.8%
Tesco, Station Yard, Hinckley (zone 1)	6.4	11.7	0.0	0.4	0.5	1.2	1.2	21.5	7.4%
Aldi, Watling Street, Hinckley (zone 2)	12.2	1.3	2.3	2.3	0.9	2.3	0.8	22.0	7.6%
Lidl, Hawley Road, Hinckley (zone 1)	4.2	3.7	0.2	1.3	0.3	1.4	1.2	12.3	4.2%
Sainsbury's Local, Clifton Way, Hinckley (zone 1)	4.0	0.1	0.1	0.5	0.3	0.2	0.3	5.3	1.8%
Tesco Express, London Road, Hinckley (zone 1)	1.3	0.9	0.0	0.2	0.0	0.2	0.2	2.8	1.0%
Sub-total, edge/out-of-centre stores in Hinckley	58.0	22.9	3.5	22.7	7.4	13.9	9.7	138.2	47.9%
Barwell & Earl Shilton foodstores									
Co-Op, Wood Street, Earl Shilton (zone 6)	0.6	0.0	0.0	3.0	0.0	7.3	0.0	10.9	3.8%
Other stores, Earl Shilton (zone 6)	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.7	0.2%
Other stores, Barwell (zone 4)	0.0	0.2	0.0	2.3	0.1	0.2	0.0	2.8	1.0%
Sub-total, Barwell & Earl Shilton foodstores	0.6	0.2	0.0	5.3	0.1	8.1	0.0	14.4	5.0%
Market Bosworth foodstores									
Co-Op, Main Street, Market Bosworth (zone 5)	0.0	0.0	0.0	0.1	2.2	0.0	0.0	2.3	0.8%
Sub-total, Market Bosworth foodstores	0.0	0.0	0.0	0.1	2.2	0.0	0.0	2.3	0.8%
Other foodstores									
Co-Op, Boystade Road, Burbage, Hinckley (zone 2)	0.4	3.8	0.0	0.0	0.0	0.0	0.0	4.2	1.5%
Co-Op, 23 Newbold Road, Desford, Leicester (zone 5)	0.0	0.0	0.0	0.0	1.5	0.0	0.0	1.5	0.5%
Co-Op, West End, Barlestone (zone 5)	0.0	0.0	0.1	0.5	1.4	0.0	0.0	2.0	0.7%
Co-Op, Main Street, Newbold Verdon (zone 5)	0.0	0.0	0.0	0.0	1.3	0.3	0.5	2.1	0.7%
Sub-total, other foodstores	0.4	3.8	0.1	0.5	4.2	0.3	0.5	9.8	3.4%
Sub-total, convenience goods floorspace in Hinckley & Bosworth (A)	69.3	33.7	4.5	31.6	15.8	25.4	12.2	192.5	66.7%
Convenience goods floorspace outside Hinckley & Bosworth (outside survey area)									
Nuneaton foodstores	0.5	1.3	28.3	1.9	0.9	0.3	0.9	34.2	11.8%
Leicester foodstores	0.2	0.7	0.6	0.3	5.8	0.8	12.8	21.3	7.4%
Bedworth foodstores	0.0	0.0	3.9	0.0	0.0	0.0	0.0	3.9	1.4%
Coalville / Ibstock foodstores	0.0	0.0	0.2	0.2	6.5	0.0	0.0	6.9	2.4%
Lutterworth foodstores	0.5	0.2	0.0	0.0	0.0	0.0	3.7	4.3	1.5%
Blaby foodstores	0.2	0.0	0.0	0.0	0.0	0.1	2.2	2.5	0.9%
All other locations outside survey area	0.0	1.8	1.4	1.4	1.4	0.0	2.0	8.0	2.8%
Sub-total, convenience goods floorspace outside survey area (B)	1.4	3.9	34.5	3.8	14.6	1.2	21.6	81.0	28.1%
Local / small shops in survey area (C)	0.6	1.9	0.8	1.1	1.4	0.1	9.0	15.1	5.2%
OVERALL TOTAL (A+B+C)	71.4	39.6	39.8	36.5	31.8	26.7	42.9	288.6	100.0%

Source: Table 3, Table 4

Table 6: Performance assessment of convenience goods floorspace

	Total net floorspace (sq.m)	Net Conv Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sqm net)	Average Turnover 2016 (£m)	Actual Turnover 2016 (£m) (Table 5a)	Difference from Avg Turnover 2016 (£m)
Hinckley town centre foodstores							
Sainsbury's, Rugby Road, Hinckley (zone 1)	3,493	70%	2,445	12,181	29.8	16.0	-13.8
Iceland, Waterloo Road, Hinckley (zone 1)	400	97%	388	7,312	2.8	1.6	-1.2
Other stores, Hinckley town centre (zone 1)	-	-	-	-	-	7.7	-
Sub-total, Hinckley town centre foodstores	3,893	-	2,834	-	32.6	25.3	-15.0
Edge/out-of-centre foodstores in Hinckley							
Asda, Barwell Lane, Hinckley (zone 1)	3,233	67%	2,166	13,350	28.9	36.4	7.5
Morrisons, Normandy Way, Hinckley (zone 1)	2,787	80%	2,230	12,857	28.7	30.9	2.2
Tesco, Station Yard, Hinckley (zone 1)	1,790	85%	1,522	11,619	17.7	19.7	2.0
Aldi, Watling Street, Hinckley (zone 2)	1,044	80%	835	9,704	8.1	19.9	11.8
Lidl, Hawley Road, Hinckley (zone 1)	935	80%	748	5,000	3.7	11.2	7.4
Sainsbury's Local, Clifton Way, Hinckley (zone 1)	250	95%	238	12,181	2.9	4.8	1.9
Tesco Express, London Road, Hinckley (zone 1)	355	90%	320	11,619	3.7	2.6	-1.2
Sub-total, edge/out-of-centre stores in Hinckley	10,394	-	8,057	-	93.7	125.4	31.7
Barwell & Earl Shilton foodstores							
Co-Op, Wood Street, Earl Shilton (zone 6)	880	87%	768	7,823	6.0	9.9	3.9
Other stores, Earl Shilton (zone 6)	-	-	-	-	-	0.6	-
Other stores, Barwell (zone 4)	-	-	-	-	-	2.5	-
Sub-total, Barwell & Earl Shilton foodstores	880	-	768	-	6.0	13.0	3.9
Market Bosworth foodstores							
Co-Op, Main Street, Market Bosworth (zone 5)	150	97%	146	7,823	1.1	2.1	1.0
Sub-total, Market Bosworth foodstores	150	-	146	-	1.1	2.1	1.0
Other foodstores							
Co-Op, Boyslade Road, Burbage, Hinckley (zone 2)	282	95%	268	7,823	2.1	3.9	1.8
Co-Op, 23 Newbold Road, Desford, Leicester (zone 5)	91	97%	88	7,823	0.7	1.4	0.7
Co-Op, West End, Barlestone (zone 5)	79	97%	77	7,823	0.6	1.8	1.2
Co-Op, Main Street, Newbold Verdon (zone 5)	216	95%	205	7,823	1.6	1.9	0.3
Sub-total, other foodstores	668	-	638	-	5.0	9.1	4.1
Overall total	15,985	-	12,443	11,129	138.5	174.9	25.6

Floorspace source: IGD / Promap / Hinckley & Bosworth Borough Council

Company average convenience goods floorspace ratios sourced from Verdict, but adjusted based on own observations where necessary.

Company average sales densities sourced from Mintel UK Retail Rankings

Hinckley & Bosworth Borough Council — Town & District Centres Study 2016
Convenience goods capacity forecasts

Table 7: Commitments for new convenience goods floorspace

Proposed development	Net Convenience Goods Floorspace (sq.m)	Company Average Sales (£/sq.m net)	Average turnover 2021 (£m)	Average turnover 2026 (£m)	Average turnover 2031 (£m)	Average turnover 2033 (£m)
No commitments	-	-	0.0	0.0	0.0	0.0
Total	0	-	0.0	0.0	0.0	0.0

Source: Hinckley & Bosworth Borough Council planning application monitoring

Hinckley & Bosworth Borough Council — Town & District Centres Study 2016

Convenience goods capacity forecasts

Table 8: Borough-wide floorspace capacity

	2016	2021	2026	2031*	2036*
Residents Spending in Hinckley & Bosworth Borough main stores (£m)	174.9	177.0	181.1	185.5	192.5
Existing main stores floorspace within Borough (sq.m net)	12,443	12,443	12,443	12,443	12,443
Sales per sq.m net (£)	14,058	11,129	11,129	11,129	11,129
Sales from existing floorspace (£m)	174.9	138.5	138.5	138.5	138.5
Sales from committed floorspace (£m)	0.0	0.0	0.0	0.0	0.0
Residual spending to support new convenience goods floorspace (£m)	0.0	38.5	42.6	47.0	54.0
Sales per sq.m net in new shops (£) <i>Based on large store format</i>	12,000	12,181	12,365	12,551	12,741
Capacity for new floorspace (sq.m net)	0	3,159	3,446	3,748	4,241
Capacity for new floorspace (sq.m net, rounded)	0	3,200	3,400	3,700	4,200

Assumes growth in sales efficiency of 0.3% per annum to 2036 (source: Experian Retail Planner 14)

*indicative forecasts, should be subject to further review throughout Local Plan period.

OPERATOR DEMAND REPORT

1 INTRODUCTION

- 1.1 Hinckley is a thriving market town with a diverse mix of multiple and independent retailers, with a popular and award winning traditional market trading on the main pedestrianised area of the town centre every Monday, Friday and Saturday. The town centre has the benefit of high occupancy rates - and is focused around a pleasant pedestrianised heart with excellent car, bus and train access.
- 1.2 Retailing in Hinckley is concentrated on the pedestrianised, prime pitch of Castle Street which hosts a majority of national retailers together with discounters B&M, Dunelm and The Works. Access to Britannia Shopping Centre is from the north side of Castle Street and it is anchored by a large Wilkinsons (Wilko's) and a number of other discount retailers, including Peacocks, Pound World, Pound Base Plus. As set out in Volume 1 of this report, the town centre retail and leisure offer has recently been enhanced through the recent opening of The Crescent, anchored by a large Sainsbury's store and a Cineworld cinema, alongside a range of other retail and leisure operators including TK Maxx, Superdrug, Costa and Prezzo.
- 1.3 Hinckley Town Centre is encapsulated as a Business Improvement District (BID). Projects delivered by the BID are designed to drive footfall into the town centre, market and promote the local business community and provide business support and cost saving initiatives to the benefit of BID members. Investment has been made by the BID to advance Hinckley as a 'Digital High Street' offering initiatives such as centre-wide free Wi-Fi.
- 1.4 Hinckley Town Centre Partnership working closely with Hinckley & Bosworth Borough Council organises the Town Centre events calendar throughout the year, attracting some 40,000 additional visitors annually.
- 1.5 The centre of Hinckley retains much of its character with many buildings reflecting key periods from its history, some of which are listed as being of national importance. These include the medieval Castle Mound, the original Framework Knitters Museum through to the Arts & Crafts influenced Free Library dating back to 1887.

Transport Links

- 1.6 Hinckley is ideally located in South West Leicestershire with easy access to the motorway network, with Junction 22 of the M1 and with Junction 1 and 2 of the M69 passing through the Borough. It is bordered to the north by the M1, to the east by the M69, to the west the M42 and to the south by the main A5.
- 1.7 Local train services operate from Hinckley to Leicester, Birmingham and Coventry . Trains to Leicester continue on to Nottingham and the North. There are more than 30 trains a day to London via Nuneaton or Leicester.
- 1.8 Birmingham International Airport and East Midlands Airport are both only 30 minutes away from the centre of Hinckley Town Centre.

Development

- 1.9 Hinckley is undergoing a £1bn programme of transformational new investment, £200m of which is in the town centre. This will create over 3,000 jobs. A number of these projects include the new College of FE campus, and the £5m restoration and conversion of The Atkins Building into a creative industry business centre, both of which have recently completed.
- 1.10 Other major projects include the £80 million Crescent Leisure and Retail scheme. The Crescent is a new development of retail, leisure and restaurant outlets in Hinckley town centre. Sainsbury's (including Snap fitness and Timpsons), Cineworld, TK Maxx, Prezzo, Wed2B, Costa, Tarro Lounge, Elbow Room, FAB, Burger King, Simply Gym, Mobility & Lifestyle, Poundland, GHM! and Rossini are all open and trading with the final few occupiers due to be announced shortly by the developer.
- 1.11 The Council is looking to work with partners to build on the success of the Hinckley Town Centre Renaissance Masterplan whilst broadening the scope to other town and key village centres at Market Bosworth, Barwell and Earl Shilton. This will build on the £1 billion regeneration programme of transformational new investment being facilitated across the Borough which will create over 7,000 jobs.

Catchment Area Stats

- The Catchment Area for Hinckley as outlined by Experian has a population of 363,475 with 147,632 households.

- The population of the borough of Hinckley & Bosworth is 104,800, with the largest proportion – 37,210 living in Hinckley.
- Along with Loughborough, Hinckley is the largest secondary centre in the county of Leicestershire.
- Hinckley sits within the East Midlands but also benefits from the economies of the West Midlands region as the border is close by.

2 SOFT MARKET TESTING

- 2.1 We approached 96 national retail and leisure operators in order to ascertain a good cross section of responses to the question as to whether or not they either had a new requirement to gain representation in Hinckley Town Centre or needed to relocate within the town centre in order to obtain a larger store.
- 2.2 As stated above there are a number of national retailers and leisure operators already represented in the Town Centre (both on Castle Street, the Britannia Centre and within the new Crescent Development) several of whom are major discounters (eg Wilkinsons, Poundland, B&M) and therefore we were careful when preparing our list of parties to approach to bear in mind the current mix of uses and traders in the town.
- 2.3 Similarly we are aware that most of the major foodstore operators have a representation in and around Hinckley including Aldi, Lidl, Morrisons, Asda, Tesco and Sainsbury's. Experience tells us that Hinckley would not have the right demographic for a Waitrose.
- 2.4 In order to ascertain worthwhile responses we contacted either the companies directly (39) or, their solely retained agents (58), by email which was followed up with two further reminder emails and a number of telephone approaches. We received 49 direct responses which is above average in these circumstances.
- 2.5 Of particular interest are nine parties who responded positively and have a requirement as listed below:-

Bargain Booze	1250-1500 sq.ft
The Co Operative (Food)	3000-5000 sq.ft
Farm Foods	6000-8000 sq.ft
Halfords	4000 sq.ft
Heron Foods	3000-4000 sq.ft
Superdrug	4000 sq.ft
TJ Hughes	15,000-35,000 sq.ft
Warren James Jewellers	800-1000 sq.ft
Wetherspoons (relocation)	5000 sq.ft ground, 4000 sq.ft ancillary

- 2.6 We also received the following 'no requirement' responses:

Operator	Response
All Bar One/ Miller & Carter	Unfortunately we don't have a requirement for Hinckley at the moment.
All Stars Lane	We're just focusing on London and the major cities so no requirement for Hinckley. Requirement generally is 15-30k sqft.
Café Rouge	No requirement.
Boots	We currently operate a Boots the Chemists and a Boot Opticians format in Hinckley. Currently we do not have an outstanding requirement for additional space in the town.
Brantano	At present, Brantano nor Jones Bootmaker have a retail requirement for Hinckley, Earl Shilton, Barwell or Market Bosworth.
Jones Bootmaker	At present, Brantano nor Jones Bootmaker have a retail requirement for Hinckley, Earl Shilton, Barwell or Market Bosworth.
Easy Gym	Hinckley Town is not on his target list at this moment in time. We typically look for units that are between 15,000 – 20,000 sq.ft.

Eat	No requirement.
Fitness First	FF are only looking in Central London at the moment.
JD Sports	We don't currently have a requirement for additional representation in Hinckley town centre.
Maplin	Hinckley borough is not on our target list.
Marstons	We have no town centre requirement in Hinckley.
McDonalds	McDonald's do not have a requirement for space in Hinckley town centre.
Nandos	Nando's have considered the town most recently in regard to the newly opened leisure scheme. They have concluded that Hinckley is not a requirement town.
Pure Gym	Telephone message to confirm no requirement.
Sainsbury's	Currently we do not have a requirement for additional space in the town centre. Our supermarket opened in October last year.
Sports Direct	No requirement for the town I am afraid
Bella Italia	Bella have considered the town most recently in regard to the newly opened leisure scheme. They have concluded that Hinckley is not a requirement town.
Bodycare Health & Beauty	They don't have a requirement to upsize.
EAT	No EAT requirement.
Everything Everywhere	EE have no requirements for an out of town store in Hinckley.
Fitness 4 Less	Fitness 4 Less are focused on Greater London and the South East of England at this point in time and will not consider any sites further north than Milton Keynes.
Forever 21	Forever 21 do not have a requirement
Greggs	<p>Greggs have two units in Hinckley and doubt they have a requirement for more.</p> <p>However, Greggs will consider opportunities as they arise, and have been busy over the last 3 years re-siting units, for a number of operational reasons. Clearly this can come down to timings.</p> <p>Currently their requirements are for units of at least 1,000sqft ground floor, but ideally 1,250 – 1,500sqft with the ability to have outside seating.</p>
Handmade Burger Co	Handmade burger co do not have a current requirement for Hinckley.
LA Fitness	With Simply Gym going into The Crescent none of my health and Fitness guys would go in competition given size of catchment.
Lakeland	Hinckley is too small for us in afraid
Lambretta	Lambretta don't have a requirement for Hinckley.
Poundworld	In the town centre and no reqt.
Sport Store	No requirement
Perfume Shop	The perfume shop don't have a requirement.
Sweat	Town is too small we target 100,000 + but we take 15,000 to 25,000 sq.ft.
The Food Warehouse Iceland	No requirement.
The White Company	No requirement for The White Company.
Toys R Us	Toys R Us do not have a requirement for Hinckley
Virgin Active	Virgin Active do not have a requirement for Hinckley
WH Smtih	Already there – they wouldn't want more space
Xercise4Less	Catchment isn't large enough for X4L
Slug and Lettuce	No requirement.

3 CONCLUSION

- 3.1 Whilst it was expected that a number of national retailers or leisure operators would not have a requirement for the town it is encouraging that nine parties have responded positively.
- 3.2 Between them they have a space requirement for between 42,000 sq.ft - 67,500 sq.ft, of which 17,000 sq.ft is for convenience foods; up to 35,000 sq.ft for a department store; and that Wetherspoons require a relocation in the town centre.
- 3.3 Notwithstanding the above we would point out that the Co-operative, Farmfoods, and Heron Foods would prefer locations where there is the opportunity for customer car parking and therefore maybe more appropriate for edge of town sites rather than town centre.
- 3.4 Perhaps surprisingly both Nando's and Bella Italia have considered the town recently (The Crescent scheme) and have concluded that Hinckley is not a requirement.
- 3.5 Whilst we asked all parties to comment on both Hinckley Town Centre and the town Centre's of Earl Shilton, Barwell and Market Bosworth we are not surprised that most of the parties responded with regard to Hinckley Town Centre in particular as the other three centres are more likely to attract independent operators rather than national's.