Hinckley and Bosworth Retail and Leisure Study

ON BEHALF OF HINCKLEY AND BOSWORTH BOROUGH COUNCIL

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Executive Summary

This Retail and Town Centre Study has been commissioned by Hinckley and Bosworth Borough Council and has been prepared by Nexus Planning. The purpose of the Study is to provide an update to the 2017 Town and District centre Study, prepared by GVA Planning.

The Study aims to provide the Council with an up-to-date, objective assessment of the health of centres in the Council area and considers possible strategic policy responses to prevalent and emerging retail and town centre issues.

The Study begins with an overview of key national and local policies relating to retail and leisure, and of current and future retail trends.

The Study then provides detailed health check assessments for Hinckley Town Centre and the three existing district retail centres (Barwell, Market Bosworth, Earl Shilton). Health checks are recognised as important planning ‘tools’ for appraising and monitoring the changes in the overall vitality and viability of town centres and informing both plan-making and decision-taking at the local level. For each centre, the Study recommends place-specific interventions.

The Study then goes on to review existing market shares across the Study Area, as informed by the telephone Household Survey, which comprised 700 interviews split between seven zones. Overall, the Study summarises the key findings on internet shopping patterns, as well as a survey-derived market share analysis for convenience and comparison goods spending at ‘bricks and mortar’ locations. It also examines the level of take-up for various leisure activities and examines any locally identified deficiencies in provision.

Based on these market shares, we then forecast the level of capacity for additional convenience, comparison, and leisure floorspace up to 2045. Our analysis projects a moderate level of capacity for both convenience goods and comparison goods across the plan period to 2045. In terms of leisure provision, our analysis identified potential for additional food and beverage floorspace and potentially for a ten-pin bowling facility.

Year	Convenience Goods (sq. m)	Comparison Goods (sq. m)	Food/Beverage (sq. m)
2031	6,300	0	2,200
2036	6,900	2,600	4,600
2041	7,600	4,800	7,300
2045	8,400	6,800	9,200

Figure 1.1.1 **Summarised findings of convenience goods, comparison goods and food and beverage net floorspace capacity**

The Study concludes by providing guidance to inform the emerging Local Plan on the following matters: retail and leisure capacity and strategy; the hierarchy of centres; the spatial extent of centres; and the recommended planning policy approach. The Study suggests that additional consideration should be given to reviewing primary shopping frontages and retail impact threshold under the existing policies, as well as some recommended adjustments to centre boundaries. The Council should also be cognisant of the priority to fill vacant units, particularly within Hinckley town centre, though this is likely to be more of a matter for development management than policy-making.

1. Introduction

Overview

1.2 This Retail and Leisure Study has been commissioned by Hinckley and Bosworth Borough Council ('the Council'). The preparation of the Study has been led and coordinated by Nexus Planning ('Nexus').

1.3 The purpose of the Study is to provide an update to the previous Hinckley and Bosworth Town and District centre Study, which was produced in 2017. The Study aims to provide the Council with an up-to-date, objective assessment of the health of centres in the Council area. It considers possible strategic policy responses to prevalent and emerging retail and town centre issues.

1.4 The Study has been prepared to reflect the requirements of the National Planning Policy Framework ('the NPPF') and the Town Centres and Retail Planning Practice Guidance ('the Town Centres PPG').

Structure of the Study

1.5 This report is structured as follows:

- Section 2 provides a summary of the key national and local retail policy context relevant to the Study.
- Section 3 summarises key current and future retail trends and, in doing so, provides the overarching context for this Study and how it can be used to guide plan-making.
- Section 4 describes our health-check assessments of Hinckley Town Centre and district centres.
- Section 5 sets out our assessment of retail and leisure market shares and capacity.
- Section 6 provides guidance to inform the emerging Local Plan on retail and leisure capacity, strategy, and general policy direction.

2. Retail and Town Centres Policy

Revised National Planning Policy Framework

2.1 The updated 2024 Framework replaces the previous version of the National Planning Policy Framework published in December 2023. The NPPF reflects the fact that the traditional role of Town Centres has been somewhat undermined by structural changes in the retail sector, and that there may be a need to plan for a more diverse range of uses going forward. As such, the NPPF advocates a more flexible policy framework to support the future vitality and viability of Town Centres.

2.2 NPPF policies are considered on a thematic basis below.

Plan-Making

2.3 Paragraph 20 of the NPPF indicates that development plans should set out an overall strategy for the pattern, scale, and quality of development, including policies to deliver retail, leisure, and other commercial development. Paragraph 31 states that the preparation and review of all policies should be underpinned by relevant and up-to-date evidence. This should be proportionate and take into account relevant market signals.

Building a Strong, Competitive Economy

2.4 Paragraph 85 of the NPPF indicates that planning policies and decisions should help create the conditions in which businesses can invest, expand, and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development.

Ensuring the Vitality of Town Centres

2.5 Paragraph 90 specifically relates to planning for Town Centres. It states that:

"Planning policies should:

- define a network and hierarchy of Town Centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allowing a suitable mix of uses (including housing) and reflecting their distinctive characters.
- define the extent of Town Centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
- retain and enhance existing markets and, where appropriate, reintroduce or create new ones;
- allocate a range of suitable sites in Town Centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office, and other main Town Centre uses over this period should not be compromised by limited site availability, so Town Centre boundaries should be kept under review where necessary.
- where suitable and viable Town Centre sites are not available for main Town Centre uses, allocate appropriate edge of centre sites that are well connected to the Town Centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the Town Centre; and

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

2.6 The requirement to plan to meet needs across a minimum fifteen-year period (Paragraph 22) represents a change from the previous NPPF, which required Town Centre needs to be met in full across the entire plan period.

2.7 In addition, it is notable that the NPPF Annex 2 Glossary does not make any reference to the designation of primary and secondary frontages. Page 32 of the Government Response to the 2018 Draft Revised National Planning Policy Framework Consultation indicated that, whilst the revised NPPF (2021, 2023 and 2025) has removed the expectation in national planning policy that such frontages must be defined, this does not necessarily preclude authorities from doing so where their use can be justified. However, it is evident that the general intention is to provide for more flexibility through a less prescriptive approach to land use.

2.8 Paragraph 91 of the NPPF states that it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail and leisure development that should be the subject of an impact assessment. Any such threshold policy applies only to the impact test. All planning applications for main Town Centre uses that are not in an existing centre and not in accordance with an up-to-date development plan will generally be the subject of the sequential test.

Promoting Healthy and Safe Communities

2.9 Paragraph 98 seeks to support the social, recreational, and cultural facilities and services that communities need. The guidance states that planning policies and decisions should:

- plan positively for the provision and use of shared spaces, community facilities (such as local shops, meeting places, sports venues, open space, cultural buildings, public houses, and places of worship), and other local services to enhance the sustainability of communities and residential environments;
- take into account and support the delivery of local strategies to improve health, social and cultural well-being for all sections of the community;
- guard against the unnecessary loss of valued facilities and services, particularly where this would reduce the community's ability to meet its day-to-day needs;
- ensure that established shops, facilities, and services can develop and modernise, and are retained for the benefit of the community; and
- ensure an integrated approach to considering the location of housing, economic uses and community facilities and services.

Ensuring the Vitality of Town Centres: Planning Practice Guidance

2.10 The Town Centres PPG was published in July 2019 and thereafter updated in September 2020. It provides additional direction in respect of how retail and Town Centre planning policy should be applied in respect of plan-making and decision-taking. The Town Centres PPG affirms the Government's aspiration to support Town Centres in order to generate employment, promote beneficial competition and create attractive, diverse places where people want to live, work and visit.

2.11 Paragraph 004 of the Town Centres PPG indicates that a local planning authority's strategy for their Town Centres should include:

- The realistic role, function, and hierarchy of Town Centres over the plan period. Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account. The vision for the future of each Town Centre, including, the most appropriate mix of uses to enhance overall vitality and viability.
- The ability of the Town Centre to accommodate the scale of assessed need for main Town Centre uses, and associated need for expansion, consolidation, restructuring or to enable new development or the redevelopment of under-utilised space.
- How existing land can be used more effectively – for example, the scope to group particular uses such as retail, restaurant, and leisure activities into hubs or for converting vacant space above shops.
- Opportunities for improvements to the accessibility and wider quality of Town Centre locations, including improvements to transport links in and around Town Centres, and enhancement of the public realm.
- What complementary strategies are necessary or appropriate to enhance the Town Centre and help deliver the vision for its future, and how these can be planned and delivered. For example, this may include consideration of how parking charges and enforcement can be made proportionate.
- The role that different stakeholders can play in delivering the vision. If appropriate, it can help establish the level of cross-boundary/strategic working or information sharing required between both public and private sector groups.
- Appropriate policies to address environmental issues facing Town Centres, including opportunities to conserve and enhance the historic environment.

2.12 This Study seeks to provide a high-level retail and leisure strategy for the Town Centre, which will provide an overall context to the determination of planning applications for such uses and will support the Council's future development plan policy.

2.13 Paragraph 006 of the Town Centres PPG identifies a series of key indicators of relevance in assessing the health of a centre over time. The indicators allow the role, performance, and function of centres to be monitored and are considered in greater detail in Section 4 of this report, which specifically addresses the vitality and viability of Hinckley Town Centre and the district centres (Barwell, Market Bosworth and Earl Shilton).

Use Classes Order

2.14 Significant changes to the Use Classes Order have been enacted through the Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020, which came into force on 1 September 2020.

2.15 The amendments include the revocation of Parts A and D of the Schedule to the Use Classes Order 1987, and the introduction of three new Use Classes, these being Classes E, F1 and F2. The Government's objective is that the changes will support the revival of the high street and allow for greater flexibility in changing uses within Town Centres without the need for planning permission.

2.16 In addition to the three new Use Classes, the changes also result in some changes in respect of uses classified as sui generis. In practical terms, the changes comprise:

- **Use Class E** – Commercial, business and service use includes shops or retail; cafes or restaurants; financial services; professional services; any service appropriate to provide in a commercial, business, or service locality; indoor sports, recreation, or fitness; medical or health services; crèche, day nursery or day centre; and offices.

- **Use Class F1** – Learning and non-residential institutions include any non-residential use for the provision of education; display of works of art; museum; public library or public reading room; public hall or exhibition hall; for or in connection with public worship or religious instruction; or, as a law court.

- **Use Class F2** – Local community uses include: a shop selling mostly essential goods, including food, no larger than 280 sqm and where there is no other such facility within a 1,000-metre radius of the shop's location. A hall or meeting place for the local community, an area or place for outdoor sport or recreation and an indoor or outdoor swimming pool or skating rink.

- **Sui Generis** – Use within this Class now includes a public house, wine bar or drinking establishment; a drinking establishment with expanded food provision; a hot food takeaway for the sale of hot food where consumption of that food is mostly undertaken off the premises; a live music venue; cinema; concert hall; bingo hall; or dance hall.

2.17 The introduction of Class E is significant and places a wide range of uses, including retail, food, financial services, gyms, healthcare, nurseries, offices, and light industry into a single use class. Unless restrictive planning conditions extinguish the provisions of Class E, the ability to significantly change the commercial use of premises without planning permission allows centres to evolve flexibly.

2.18 However, the provisions of the Use Classes Order are not linked to any spatial considerations. As such, the expanded Use Class E applies equally to both Town Centres and out-of-centre locations, and there may be unintended consequences in providing for additional flexibility across Class E outside of Town Centres. Accordingly, it may be necessary for the Council to apply restrictive conditions to certain forms of development to restrict the authorised use to that which has been justified in the application submission. This will help ensure that unacceptable impacts do not arise from future Class E development.

Town Centre Use Permitted Development Rights

2.19 An amendment was made to the General Permitted Development (England) Order 2015 (the 'GPDO') in March 2021. This allows for the change of use from Class E properties to residential from August 2021 (extending a right that had previously been restricted to office uses). This permitted development right is subject to maximum size requirements, the property having been in use as Class E for two years, and the property having been vacant for three months. In addition to this, 'prior approval' for the change of use must be sought from the planning authority. Restrictions on this right apply in conservation areas and for nurseries, as well as in areas that are covered by an Article 4 direction.

Emerging Policy

2.20 Draft NPPF 2025 was released for consultation in December 2025. At the time of writing this report, any proposed changes to the NPPF remain in draft form. There are some changes proposed to town centres policy through which are worth summarising here, as they shape the intended direction for policy in England.

2.21 Under draft Policy TC1, there is still a requirement in plan-making to define a hierarchy of centres. However, whilst there is still a need to define a town centre boundary, there are no longer any references to the primary shopping area (in the plan-making policy), suggesting that delineating this area is no longer preferred.

2.22 Accordingly, the glossary makes a significant change to the definition of 'edge of centre'. In the current NPPF, the application of 'edge of centre' was use dependent and was measured as being from the primary shopping area for a retail use, but 300m from the town centre boundary for any other main town centre use. Now the draft glossary has clarified that 'edge of centre' is a location that is well connected and within 300 metres of a <u>town centre boundary for all main town centre uses</u>. This would mean that the designation of a primary shopping area, whilst still an option, is no longer required for the application of the sequential test.

2.23 Draft Policy TC2 still promotes supporting the overall vitality and viability of centres, but introduces the concept of 'diversification of uses, intensification and provision of retail accommodation', aligning the national retail policy with the introduction of Use Class E to create more flexibility in centres.

2.24 Draft Policy TC3 retains flexibility in the application of the sequential test but now brings wording from the Planning Practice Guidance into the NPPF, requiring different scales and forms of development to be considered. Crucially, it also introduces a requirement to consider whether proposals could be accommodated across multiple sites, marking a return to the concept of 'disaggregation' that was removed from national policy in 2012.

2.25 Draft Policy TC4 maintains the application of a retail impact assessment subject to the default floorspace threshold of 2,500 sq. m, unless varied by a development plan.

Local Planning Policy Context

2.26 The local development scheme provides information on development plans. Development Plan Documents are planning strategies that contain policies for the use, protection, and/or development of land.

2.27 The statutory development plan for Hinckley Bosworth Borough Council comprises the following: Core Strategy (Adopted December 2009), Site Allocations & Development Management Policies (Adopted July 2016), Hinckley Town Centre Area Action Plan (HTCAAP), and the Earl Shilton and Barwell Area Actions Plan.

Core Strategy (Adopted December 2009)

2.28 **Spatial Objective 2**: The objective of the core strategy seeks to deliver the regeneration of Hinckley town centre, as a vibrant, thriving sub-regional centre, which provides opportunities for retail, leisure, and commercial activities, whilst supporting the vibrancy and vitality of Earl Shilton, Barwell and Burbage as important urban local centres.

2.29 **Policy 2 (Development in Earl Shilton):** Policy 2 supports the regeneration of Earl Shilton through the allocation of land for the development of a mixed-use Sustainable Urban Extension, including homes, shops, and community facilities. Development in Earl Shilton should support employment opportunities, leisure facilities, transport improvements, be respectful of the character and appearance of the Conservation area, support the development of the tourism industry and improve the existing green infrastructure and cycle networks. With respect of town centre policies, Policy 2 states development within the local centre should include public realm improvements, the development of a focal civic space and the provision of additional retail floor space within the defined Earl Shilton local centre that does not compete with the Hinckley Town Centre as the sub-regional centre.

2.30 **Policy 3 (Development in Barwell):** Policy 3 supports the regeneration of Barwell through the allocation of land for the development of a mixed-use Sustainable Urban Extension, including homes, shops, and community facilities. Development in Barwell should support employment opportunities, leisure facilities, transport improvements, be respectful of the character and appearance of the Conservation area, support the development of the tourism industry and improve the existing green infrastructure and cycle networks. With respect of town centre policies, Policy 3 states development within the local centre should include public realm improvements, traffic calming measures, and the provision of additional retail floor space within the defined Barwell local centre that does not compete with the Hinckley Town Centre as the sub-regional centre.

2.31 **Policy 4 (Development in Burbage):** Policy 4 recognises the role Burbage local centre plays in supporting Hinckley's role as a sub-regional centre. Policy 4 includes the allocation of land for new residential development and employment land to support employment opportunities within Burbage and in proximity to Hinckley. Policy 4 supports the provision of additional retail floorspace within the defined Burbage local centre, and additional car parking to enable residents to shop close to home, provided that the retail development does not compete with the Hinckley Town Centre as the sub-regional centre.

2.32 **Policy 7 (Key Rural Centre):** To support Key Rural centres, Policy 7 sets out that the council will support housing within settlement boundaries, support employment uses within allocated employment sites, support new retail to meet local need within defined local centre boundaries, and resist the loss of shops and facilities in Key Rural Centres. Paragraph 4.31 identifies key rural centres as having villages with populations over 1500 people with key community facilities such as a school, GP, and post office. The following villages have been designated as Key Rural Centres: Markfield, Groby, Ratby, Barlestone, Desford, Newbold Verdon, Stoke Golding, and Market Bosworth.

Site Allocations & Development Management Policies (Adopted July 2016)

2.33 **Policy DM19 (Existing Employment Sites):** DM19 supports the retention of existing employment uses as identified in the policies map. It stipulates that Category A employment sites must be retained. On Category B sites, loss of employment sites will be considered where a marketing exercise has been undertaken. Finally, the Council will take a more flexible approach to proposed alternative uses on Category C site employment sites.

2.34 **Policy DM20 (Provision of Employment Sites):** The development of new employment uses outside of employment areas will be supported where they stand within settlement boundaries or on previously developed land. Outside of settlement boundaries and on greenfield land will only be found acceptable where it is demonstrated that there are no suitable alternative sites.

2.35 **Policy DM21 (Locating Sustainable Town Centre Uses):** Applications for the provision of new main town centre uses will be located in Hinckley Town Centre first, then District and then Local centres. Applications out of centre will need to be accompanied by a sequential assessment and must demonstrate that the site is sustainably located. Additionally, all applications for main town centre uses which are not in Hinckley Town Centre, which would result in the provision of 2,500 sqm or more gross floor space, will be required to be accompanied by a retail impact assessment.

2.36 **Policy DM22 (Vitalising District, Local and Neighbourhood Centres):** Additional retail provision within or adjacent to district, local and neighbourhood centres will be permitted where it is demonstrated that there are no suitable and available vacant premises in the nearest adjacent centre, and the retail frontage is retained and would not result in a break of continuous frontage.

2.37 **Policy DM22** also specifies the following for different centres:

2.38 **District centres:** To ensure the continued vitality and viability of district centres, the change of use from A1, or A2 retail, or loss of A1 or A2 retail uses within district centres will only be permitted where the proposal would not result in an over proliferation of any one use type in the centre, other than A1 retail, with particular reference to hot-food takeaways (A5).

- **Local Centres:** The change of use from A1 or A2 retail or loss of A1 or A2 retail uses within local centres will only be permitted where it can be demonstrated that the proposal would not detract from the vitality or viability of the Local Centre in terms of the mix and type of uses.

- **Neighbourhood centres:** The change of use or loss of A1 or A2 uses within these centres will only be permitted where it can be demonstrated that the loss would not reduce the community's ability to meet its day-to-day needs within a reasonable walking distance. In all of the above cases, proposals should accord with Policies DM10, DM17 and DM23. The use of upper floors of retail premises (A1-A5) within the district, local and neighbourhood centres, for residential use, will be supported where they accord with other policies in the Local Plan.

2.39 **Policy DM22** applies the hierarchy of centres into district, local and neighbourhood centres, also recognises Hinckley Town Centre as 'the heart' of the borough. Paragraph 15.11 states that the borough has three district centres, Earl Shilton, Barwell and Market Bosworth, with Earl Shilton District centre forming the largest of the three.

2.40 **Policy DM23 (High Quality Shop Fronts and Advertisements)** sets out that new and refurbished shopfronts should reflect the local style and materials of the surrounding areas, and the host building, and be of an appropriate scale compared to the surrounding area. Additionally, new, and refurbished shop fronts will need to take into account the levels of luminosity, outdoor advertisements, shop security features, industrial devices (such as air conditioning), design of blinds and canopies, and seek to add interest to the street scene by being of a human scale.

2.41 **Policy DM24 (Cultural and Tourism Facilities)** sets out that the Council will support the development of new cultural and tourism facilities across the borough, particularly those that can be accessed via sustainable transport options. Conversely, the Council will resist the loss of cultural and tourism facilities, unless it can be demonstrated that the facility can no longer operate, or would be feasibly replaced by another proposal.

2.42 **Policy DM25 (Community Facilities)** sets out that the Borough Council will support the formation of new community facilities across the borough and resist the loss of community facilities unless it can be demonstrated that there is a surplus of such facilities, replacement facilities within a reasonable distance, or that such a loss would result in wider community benefit on the remainder of the site.

2.43 The SAMDP also lists out site allocations for local centres and neighbourhood centres in the borough. Paragraph 4.2 explains that site allocations have not been identified through this document for Earl Shilton and Barwell, as the Earl Shilton and Barwell Area Action Plan provides for these allocations.

2.44 Retail allocations, as set out throughout the SAMDP, are summarised as follows:

Reference	Location	Designation
MKBOS30D	Market Place District centre	District centre
HIN152L	Clifton Way Local Centre	Local Centre
HIN155L	Rugby Road Local Centre	Local Centre
HIN156L	Hawley Road Local Centre	Local Centre
HIN157L	Barwell Lane Local Centre	Local Centre
HIN190L	Stoke Road and Northern Perimeter Road Local Centre	Local Centre
BUR59L	Boyslade Road and Tilton Road	Local Centre
GRO37L	Groby Village Centre	Local Centre
RAT22L	Ratby Village Centre	Local Centre
MARK24L	Main Street Local Centre	Local Centre
BARL17L	Barlestone Village Centre	Local Centre
NEW16L	Newbold Village Centre	Local Centre
HIN150N	Coventry Road and Strathmore Road Neighbourhood Centre	Neighbourhood Centre
HIN151N	Trent Road Neighbourhood Centre	Neighbourhood Centre
HIN153N	Tudor Road Neighbourhood Centre	Neighbourhood Centre
HIN154N	Coventry Road and Northfield Road Neighbourhood Centre	Neighbourhood Centre
BUR58N	Brookside	Neighbourhood Centre

Reference	Location	Designation
BUR60N	Atkins Way	Neighbourhood Centre
BUR61N	Church Street	Neighbourhood Centre
BUR62N	Windsor Street	Neighbourhood Centre
DES13N	St Martin's Drive Neighbourhood Centre	Neighbourhood Centre
DES14N	Desford High Street	Neighbourhood Centre
GRO36N	Lawnwood Road Neighbourhood Centre	Neighbourhood Centre
GRO38N	Laundon Way Neighbourhood Centre	Neighbourhood Centre
MARK25N	Chitterman Way Neighbourhood Centre	Neighbourhood Centre
STG15N	Stoke Golding Village Centre	Neighbourhood Centre

Hinckley Town Centre Area Action Plan (HTCAAP)

2.45 **Spatial Objective 3 of** the HTCAAP is to increase and improve the range of retail provision in the town centre, and Spatial Objective 4 seeks to enhance Hinckley town centre's image to developers, retailers, residents, and visitors by ensuring high-quality, safe, and well-designed, environmentally friendly development in the town centre.

2.46 Policies 2 to 9 set out Strategic Development Areas, the following are located within (fully or partially) the Hinckley Town Centre boundary:

Policy 2 – Stockwell Head / Concordia Theatre Strategic Development Area

Policy 3 – Atkins Factory Strategic Development Area

Policy 4 – Britannia Centre/ Castle Street Strategic Development Area

Policy 5 – Land north of Mount Road

Policy 6 – Leisure Centre

Policy 8 – Railway Station/ Southfield Road

Policy 9 – Bus Station

2.47 **Chapter 9 (Potential Land Use Table)** sets out the potential land uses at the above-identified Strategic Development Sites. With the Britannia Centre and the bus station identified as being capable of providing new comparison retail floorspace, and the Railway Station and the Bus Station capable of providing additional convenience retail floorspace.

2.48 In total, the Core Strategy requirement for additional retail floorspace in Hinckley is 21,100 sq. m of new comparison retail and 5,300 sq. m of new convenience retail floorspace.

Site	Housing	Office	Comparison Retail	Convenience Retail
Stockwell Head	15 - 20	2,000 - 2,500 sqm	-	-
Atkins Factory	-	c. 2,000 sqm	-	-
Britannia Centre	-	-	c. 7,000 sqm	-
Land north of Mount Road	30 - 40	3 – 4,000 sqm	-	-
Leisure Centre	30 - 40	-	-	-
Fludes	50 - 60	3 - 4,000 sqm	-	-
Railway Station	-	4 - 5,000 sqm	-	Small scale
Bus Station	-	2 - 3,000 sqm	8 - 9,000 sqm	8,500 sqm
College	65 - 75	c. 8,000 sqm	-	-
Upper Bond Street	80 – 90 *	-	-	-
Total	**325**	**28,500**	**16,000****	**8,500+**
Core Strategy Requirement	**1120 (across Hinckley town)**	**34,000**	**21,100**	**5,300**

Figure 2.48.1 **Potential Land Use Table taken from Chapter 9 of the HTCAAP**

2.49 **Policy 13 (Hinckley Town Centre Shopping Areas)** states that ground floor development along Primary Shopping Frontage will be restricted primarily to A1 uses to protect the vitality and retail integrity of the town centre's retail core. In the rest of the Town Centre Area, a mix of A1-5 and D2 uses will be acceptable.

2.50 **Policy 14 (Retail Development Outside Hinckley Town Centre)** sets out that within identified existing shopping centres; retail development will be permitted but must be of a type and size which will not have a significant adverse impact on the vitality and viability of the town centre's Primary Shopping Area.

Hinckley Key Sites Feasibility Study and Masterplans

2.51 The Hinckley Key Sites Feasibility Study and Masterplans (2025), prepared by David Lock Associates, reviews key sites for development within Hinckley town centre. There is some crossover with the HTCAAP, with the sites as follows:

1. Britannia Centre
2. Former Co-op and Car Park
3. Market Place and Bottom of Castle Street
4. The Borough

4a. Hansom Court

5. Regent Street

5a. High Cross Building

6. Church Walk

7. Stockwell Head

7a. Emmaus

8. Former Post Office, Sorting Office, and Garage

Earl Shilton and Barwell AAP (2014)

2.52 The Earl Shilton AAP discusses the Town Centre and retail; the following retail policies are of relevance.

2.53 **Policy 9 (Neighbourhood Centre in Earl Shilton Urban Extension)** advises that as part of the Urban Extension located to the east of Earl Shilton, a new neighbourhood centre will be provided that should contain a new primary school, community and recreational facilities, facilities for policing (or via developer contributions) and a local convenience retail provision. Other potential uses could include a public house or nursery use.

2.54 **Policy 15 (Neighbourhood Centre in Barwell Urban Extension)** advises that, as part of the Urban Extension located to the west of Barwell, a new neighbourhood centre will be provided that should contain a new primary school, community and recreational facilities, health facilities, facilities for policing (or via developer contributions) and a local convenience retail provision. Other potential uses could include a public house or nursery use.

2.55 **Paragraph 7.5, and Figure 5** identifies Earl Shilton as having a stretched, traditional high street, with some longer-term development opportunities. It acknowledges that there are some poor-quality shop fronts, scope to improve both pedestrian and cycle infrastructure, and improve the quality of public spaces.

2.56 **Paragraph 7.6 and Figure 6** identify Barwell as having a weak retail offer with a number of vacant shops and dominance of takeaways. Whilst part of the centre is within a conservation area, there are some poor-quality shop fronts. It is acknowledged that the community centre is not well connected to the village centre, that public spaces are of poor quality, and that car parking is limited.

2.57 **Policy 19 (Regeneration of the District centres)** will support development proposals within the settlement boundary of the District centres of Barwell and East Shilton, where they contribute to the enhancement of the public realm, contribute to the regeneration of opportunity sites, and where a proposal improves or increases the range of retail provision.

2.58 **Policy 26 (Vitalising District, Local and Neighbourhood Centres)** advises that additional retail provision within or adjacent to district, local and neighbourhood centres will be permitted where it is demonstrated that there are no suitable and available vacant premises in the nearest adjacent centre, and the retail frontage will be retained and would not result in a break of continuous frontage.

- **In District centres:** To ensure the continued vitality and viability of district centres, the change of use from A1, or A2 retail, or loss of A1 or A2 retail uses within district centres will only be permitted where the proposal would not result in an over proliferation of any one use type in the centre, other than A1 retail, with particular reference to hot-food takeaways (A5)

- **In Local Centres:** The change of use from A1 or A2 retail or loss of A1 or A2 retail uses within local centres will only be permitted where it can be demonstrated that the proposal would not detract from the vitality or viability of the Local Centre in terms of the mix and type of uses.

2.59 **In Neighbourhood centres:** The change of use or loss of A1 or A2 uses within these centres will only be permitted where it can be demonstrated that the loss would not reduce the community's ability to meet its day-to-day needs within a reasonable walking distance. In all of the above cases, proposals should accord with Policies In all of the above cases, proposals should accord with Policies DM10, DM17 and DM23. The use of upper floors of retail premises (A1-A5) within the district, local and neighbourhood centres, for residential use, will be supported where they accord with other policies in the Local Plan.

2.60 The allocation of district, local and neighbourhood centres in Earl Shilton and Barwell are as follows:

Reference	Location	Designation
BRW48D	High Street and Chapel Street	District Centre
EAR53D	The Hollow, High Street and Wood Street	District Centre
EAR52L	Belle Vue Road and Moore Road	Local Centre
EAR54N	Middle and Upper High Street	Neighbourhood Centre

Market Bosworth Neighbourhood Plan (2020-2039)

2.61 The Market Bosworth Neighbourhood Plan (MBNP) is a statutory planning document prepared by Market Bosworth Parish Council and forms part of the development plan used to determine planning applications. Originally made in 2015, it has been updated and extended to 2039 to reflect changing circumstances, updated national planning policy, and community priorities. The plan sets out increased housing and economic needs with the protection of Market Bosworth's historic character, landscape, and rural setting, while recognising its growing role as a tourism and visitor destination. The plan introduces a new Design Codes policy (DC1) requiring all development to comply with detailed, locally-specific design guidance in terms of scale, materials, rooflines, layout, and landscaping. A mixed-use site (south of Station Road) is located outside of the district centre boundary but has been allocated for housing and employment development. The plan also sets out traffic and parking improvements (some of which have already been implemented), including the establishment of a one-way gyratory in 2025 to improve circulation, and on-street parking restrictions, as well as ambitions for long-term parking sites outside of the centre boundary.

Emerging Local Policy

Hinckley and Bosworth Local Plan (2020-2045)

2.62 This document is at an early stage of preparation. A Regulation 18 draft Local Plan (2024-2041) was put to consultation between 31 July 2024 and Friday 27 September 2024. A further Regulation 18 draft local plan (2024-2045) was consulted on between 17 October and 28 November 2025 but only consulted on a number of policies. Whilst the local plan is still in draft stage, there are some questions that have relevance to this retail study.

2.63 We summarise the July 2024 Regulation 18 policies below.

2.64 **Objective 13 (Town and Village Centres)** sets out that the local plan must plan for the continued regeneration and the identification of opportunity sites in Hinckley Town Centre to accommodate a range of uses to support and expand its role as the borough's main retail, leisure, and cultural centre. It also seeks to support and develop the vitality and viability of all other identified retail centres within the borough.

2.65 **Table 5 and 6 (Hinckley & Bosworth Settlement Hierarchy)** sets out a hierarchy of the settlements in Hinckley and Bosworth:

Hierarchy Classification	Characteristics	Settlements
Urban Area	The focus of key transport, retail, employment and leisure facilities in the borough. Provides the services to meet the day to day needs of residents and is generally accessible to the surrounding area by public transport	Hinckley Burbage Barwell Earl Shilton
Key Rural Centres	Provide a range of services to meet most of the day to day needs of residents and act as a focal point to help meet the needs of the surrounding rural communities	Barlestone Desford Groby Market Bosworth Newbold Verdon Markfield Ratby Stoke Golding
Rural Villages	More limited than Key Rural Centres but may provide some of the services to meet day to day needs of residents such as a school, regular public transport, village pub and community hall/centre	Bagworth Congerstone Higham-on-the-Hill Sheepy Magna Stanton under Bardon Thornton Twycross Witherley

Hierarchy Classification	Characteristics	Settlements
Rural Hamlets	Small rural settlements with limited to no services. Reliant on surrounding larger settlements to meet the day-to-day needs of residents	Atterton Barton in the Beans Bilstone Botcheston Bradgate Hill Brascote Cadeby Carlton Copt Oak Dadlington Far Coton Fenny Drayton Kirkby Mallory Little Orton Nailstone Norton-Juxta-Twycross Odstone Orton-on the-Hill Osbaston Peckleton Pinwall Ratcliffe Culey Shackerstone Sheepy Parva Shenton Sibson Stapleton Sutton Cheney Upton Wellsborough

Figure 2.65.1 **Hinckley & Bosworth Settlement Hierarchy from Table 2 of the emerging Local Plan**

2.66 We note that the settlement hierarchy as set out in Table 2 of the emerging Local Plan is subject to review for the upcoming Regulation 19 Local Plan. A finalised settlement hierarchy will appear in the Regulation 19 local plan.

2.67 **Policy SP03 (Strategic Site: Earl Shilton Sustainable Urban Extension (SUE))** sets out that the identified Earl Shilton Sustainable Urban Extension land as identified in the Earl Shilton and Barwell Area Action Plan (AAP) will be allocated for mixed-use development in the new local plan. The policy states that mixed-use development at the site will be subject to a site-specific design code, and will bring forward housing, employment land, highway and sustainable transport infrastructure provisions, public realm improvements, an outdoor sports provision, and a new neighbourhood centre.

2.68 **Policy SP04 (Strategic Site: Barwell Sustainable Urban Extension (SUE))** sets out that the identified Barwell Sustainable Urban Extension land as identified in the Earl Shilton and Barwell Area Action Plan (AAP) will be allocated for mixed-use development in the new local plan. The policy states that mixed-use development at the site will be subject to a site-specific design code, and will bring forward housing, employment land, highway and sustainable transport infrastructure provisions, public realm improvements, an outdoor sports provision, and a new neighbourhood centre.

2.69 Tables 5 and 6 set out the settlement centre hierarchy, including defining the centre's role and functions. Both tables are reproduced as one below:

Classification	Centres	Definition
Town Centres	Hinckley	Area including the primary shopping area and area predominantly occupied by main town centre uses within or adjacent to the primary shopping area.
Borough Centres	*Barwell* *Earl Shilton* *Market Bosworth*	Comprises a group of shops often containing at least one supermarket or superstore and a range of non-retail services such as banks, building societies and restaurants, community facilities such as libraries and other retail uses that all contribute to meeting the day-to-day needs of the community that would be served by the centre
Local Centres	*Barlestone Village Centre, Burbage Boyslade Road, Burbage, Windsor Street. Groby Village Centre, Hinckley Clifton Way, Hinckley Rugby Road, Markfield Main Street, Newbold Verdon Village Centre, Ratby Village Centre.*	Include a range of small shops generally serving urban communities and larger rural villages or similar. Typically, local centres might include a convenience store, newsagent, and post office, amongst other more essential retail and non-retail uses

Classification	Centres	Definition
Neighbourhood Centres	*Burbage Atkins Way, Burbage Brookside, Burbage Church Street, Burbage Rainbow Way, Desford High Street, Desford St Martins Drive, Earl Shilton Belle Vue Road, Groby Laundon Way, Groby Lawnwood Road, Hinckley Coventry Road and Northfield Road, Hinckley Trent Road, Hinckley Tudor Road, Markfield Chitterman Way, Stoke Golding High Street and Station Road.*	A small parade or group of small shops of purely neighbourhood significance, which are not regarded as centres within the NPPF. They are considered to be important to the local community to meet their day-to-day needs. Neighbourhood centres are particularly important in Rural Villages, which often rely on a small number of retail uses and services

Figure 2.69.1 **Hinckley & Bosworth Centre Classfications and Definitions from Table 5 and 6 of the emerging Local Plan**

Other Planning Documents

2.70 The Council benefits from existing Supplementary Planning Documents (SPD), which will guide development at key locations within the borough. These documents consist of, among others, the Good Design Guide SPD (2020) which provides guidance for high quality design across the borough, including specific guidance for retail, food, and drink premises. The Council also has other adopted SPDs and guidance documents covering a variety of specific topics including affordable housing, Hinckley town centre transport contributions, and rural needs.

2.71 The **Hinckley Town Centre Public Realm Strategy Masterplan (2021)** is a strategic document which provides clear ambitions for the improvement of the public realm in Hinckley town centre, including specific projects and their delivery. Project areas include Station Square, Hawley Road, Regent Street, Lower Bond Street & King Street, Baptist Walk and Argents Mead. Improvements are site specific but include updates to landscaping, lighting, crossing and pavements and car parking layouts, among other things.

2.72 The **Hinckley Car Park Study Update (2023)** provides an update to the 2017 parking assessment. The study found that the town centre has sufficient off-street parking overall, with reduced demand since 2017. It found that most car parks operate below the 85% capacity threshold, meaning no additional parking is currently required, though Saturday short-stay pressure may increase in future.

2.73 The recently adopted **Hinckley Town Centre Strategic Vision (2025)** reviews the current position, activities and opportunities for the town centre, consulting with key stakeholders and relevant council officers, creating a vision for Hinckley town centre. It promotes a shift of the centre from retail focus (which is being impacted by online retail) to a centre for leisure and culture, events, tourism, health services, and in-centre housing. Key goals include increasing sustainability and greening, reuse of vacant buildings, improving access to health and community services, increased tourism and night-time economy, and cementing Hinckley as a ‘20-minute town’ through improved walking and cycle routes. Traditionally, town centres have avoided residential uses in the centre; however, the strategic vision recognises the improved activity, safety and diversity town centre housing will bring and seeks increases in residential uses, particularly at upper-storeys, or through re-use of long vacant spaces. New housing schemes are also recognised as contributing to infrastructure, services, and public realm improvements via contributions.

2.74 Key spatial opportunities have been identified as;

- **Market Place & Castle Street** – early-evening economy and upper floor residential use
- **Regent Street & The Borough** – mixed-use and evening activity, potential infill to rear of buildings or over-active ground floors
- **Church Walk & Stockwell Head** - Intensification of under-used land and parking areas

- **Britannia Centre, Hansom Court, former Co-op, former Post Office sites** – regeneration and reuse

2.75 The Strategic Vision Physical Interventions map (page 16) includes recommended potential changes to the town centre boundary and the primary shopping area. It also recommends the replacement of the rigid retail frontages (primary and secondary) with "core frontages" along Castle Street, Market Place, The Borough, and Regent Street. The ground floor of core frontages will be the focus for retail uses (as a priority). However, supported by other leisure and retail services can also be acceptable, with a focus on active frontages.

2.76 The strategic vision sets out a hierarchy in the town centre as follows:

- **Core Frontages** (Retail-led),

2.77 **Primary Shopping Area** (Focus for main retail and leisure uses (e.g. cafés, restaurants, cinema) and;

2.78 **Flexible Mixed-Use Areas** (Greater freedom for residential, education, workspace, and evening economy use).

2.79 **Destination Hinckley (2025):** A Destination Hinckley brochure has also been prepared by HBBC and Hinckley BID. This material promotes Hinckley as a destination for new businesses. It speaks to the role of the Hinckley BID in representing over 400 businesses, providing business support, holding over 50 events, marketing businesses and initiatives, and providing key safety improvements in partnership with police, fire, and other community groups. The brochure positions Hinckley as a well-managed market town with strong independent retail, excellent event programming, solid business support, and continued investment. Hinckley town centre is promoted as a place for new businesses and also provides an angle for increasing tourism to the town centre for short stays or day trips based on its cultural event schedules, market days and the heritage character of the area.

Summary

2.80 This section has considered the prevailing policies in respect of the retail and town centre uses at the national and local level. We examine a range of empirical evidence in the remaining sections of this Study before returning to policy matters in the closing section, where we will draw on those findings and recommend any additions or alterations to the emerging policies of the new Local Plan.

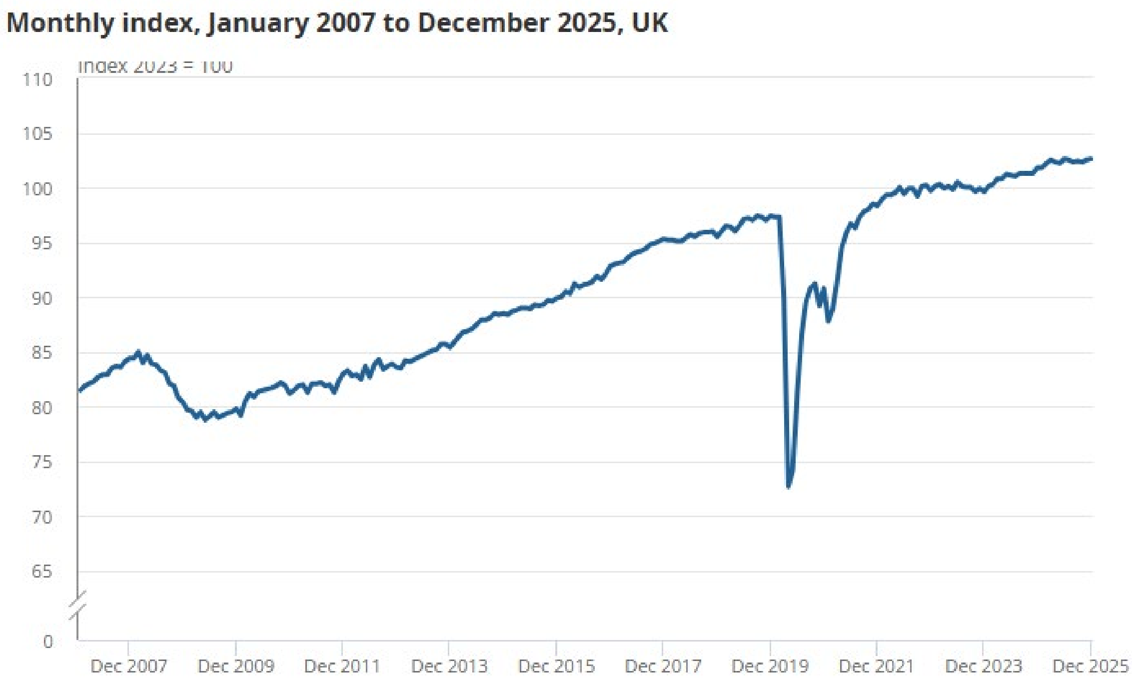
3. Retail and Town Centre Trends

Introduction

3.1 We provide an overview of current retail and leisure trends below. The retail and leisure sectors are dynamic, and new retail and leisure formats continue to evolve to meet our everyday needs. The commentary below should therefore be taken as a 'snapshot' at the current time.

The Current State of the UK Economy

3.2 In recent years, the UK economy has been greatly affected by commercial circumstances arising from the Covid-19 pandemic ('lockdowns' in 2020 and 2021), Brexit (January 2020) and the conflict in Ukraine (which started in February 2022). National Statistics ('ONS') figures indicate that UK Gross Domestic Product (GDP) has seen dramatic changes, whereby the GDP index fell from 104.2 in February 2020 to 74.6 in April 2020 and eventually rose back towards March 2022 to its pre-pandemic level. More recently, despite a strong start to 2025, the second Trump term and the imposition of tariffs resulted in a slowdown in UK-US trade. Furthermore, heightened instability in the Middle East throughout 2025 had an impact on energy prices and volatility in the market[1]. The Monthly GDP is estimated to have grown 1.0% in the three months to December 2025, compared with the three months to December 2024[2]. This is shown in the image below.



3.3 UK GDP is estimated to have increased by 1.3% in August 2025, compared with the same month in August 2024, suggesting that the economy has seen a period of recovery from a series of 'economic shocks', such as the Covid-19 pandemic (including the resultant workforce shortage) and the Russian invasion of Ukraine, which were significant

[1] Bank of England, The UK economy in an unpredictable world, June 2025
[2] ONS, GDP Monthly Estimate, December 2025

contributors to a technical recession in the second half of 2023[3]. Interest rates increased from 2.6% in March 2025 to 3.8% in July 2025 but are expected to settle at 3.5% in 2026.[4]

3.4 Economic growth in the last quarter of 2025 was limited to 1%, and household consumption grew just 0.2% in the same period.[5] In 2026, the outlook is mixed. UK inflation fell to 3% in January, the lowest level since March 2025, but still above the Bank of England's 2% target[6]. A positive forecast for the economy does rely on the absence of any further global shocks, such as continued instability in the Middle East, including the intermittent closure of the Strait of Hormuz, which spiked energy and petrol prices.

The Retail and Leisure Economy

3.5 The retail sector endured a particularly difficult pandemic, with multiple lockdowns and online competition leading to the permanent closure of many shops and businesses. UK high streets have already been in continuous decline since the 2007 recession[7], with consumer habits moving away from the traditional high street experience. The pandemic, however, accelerated these pre-existing challenges, including an unprecedented rise in online shopping.

3.6 Research[8] shows that the hospitality sector saw the biggest economic decline of all sectors during the pandemic. Periods of public health restrictions saw large falls in output. The peak of the economic downturn was in April 2020, when economic output in the food & accommodation sector was 90% below pre-pandemic levels (February 2020). Overall, economic output from the hospitality industry in 2020 was 42% lower than in 2019, and in 2021, hospitality output was 21% lower than in 2019. The hospitality industry's share of the UK economy fell from 3% in 2019 to 2% in 2020 and 2021. However, as all Covid-19 restrictions were lifted from early 2022, the hospitality sector set a strong trajectory for recovery, particularly as international tourists returned. It is forecast that the hospitality and leisure sectors are expected to be the fastest-growing parts of the economy over the next five years.

3.7 Retail sales values in the UK grew 3.4% in 2025, with grocery values up by 3.8%, and non-food values up by 2.9%. Savills estimates that average weekly high street footfall saw year-on-year growth across Q1, Q2 and Q3 of 2025 for high streets, shopping centres, and retail parks. Similarly, high street vacancy fell to 13.4% in Q4 2025 and 16.9% in shopping centres. This is the lowest level since Q3 2020.[9] Savills states that retail sales in 2025 outperformed expectations in 2025, despite ongoing inflation. Additionally, January 2026 already brought a sales boost with retail revenues up 2.7% (year on year) to January 31st. [10]

3.8 The occupancy of centres is one thing, but the composition is another important indicator of centre vitality. A report produced by Health Equity North (May 2025)[11], states that community amenities such as banks, pharmacies and grocers are being replaced by vape shops, bookmakers, and takeaway outlets. It is estimated that vape shops have increased by nearly 1200% in England between 2014 and 2024, and takeaway shops are up 24% across the whole of England. Pharmacy availability has decreased by 20% in the most deprived parts of England, and banks and building societies on high streets

[3] KPMG, UK Economic Outlook, March 2024
[4] KPMG, UK Economic Outlook, December 2025
[5] House of Commons Library, Economic Update, February 2026
[6] House of Commons Library, Economic Update, February 2026
[7] In 2011, the Portas Review summarised the challenges for high street retailers as follows: "The phenomenal growth of online retailing, the rise of mobile retailing, the speed and sophistication of the major national and international retailers, the epic and immersive experiences offered by today's new breed of shopping mall, combined with a crippling recession, have all conspired to change today's retail landscape".
[8] House of Commons Library – Research Briefing - Hospitality industry and Covid 19, 11 May 2022
[9] Savills, Spotlight: Shopping centre and high street, February 2025
[10] Savills, Spotlight: Shopping centre and high street, February 2025
[11] NIHR, report finds an increase of 'health reducing' amenities on local high streets, including a sharp rise in vape shops, May 2025

have decreased by 40% nationally. As such, whilst declining vacancy rates and fast reoccupation of vacant units are positive, the reoccupation of units with 'health reducing' amenities is a key consideration for local planning authorities.

3.9 The government announced the Budget 2025[12] in November, which has several implications, both positive and negative, for retail and town centres. Reforms to business rates will mean that small and independent businesses will benefit from lower business rate multipliers, while larger chain retailers will experience higher multipliers. An increase in the national minimum wage will increase labour costs, narrowing profit margins. Consumer spending is also likely to be restricted due to the freeze on tax thresholds and limited purchasing power.

Consumer Spending

3.10 The latest Experian Retail Planner Briefing 23 (March 2026) makes several comments regarding consumer spending, focusing on the UK's recovery from the economic impact of the Russia-Ukraine war and the Covid-19 pandemic, and discusses the impact of continuing tariffs and geopolitical disruptions in the Middle East.

3.11 Data collected at the start of 2025 suggests that, due to high inflation over the last three years, a trend of reduced spending still exists. Spending growth over the course of 2025 was hindered by the effects of the cost-of-living crisis, high interest rates, and a high tax burden. However, rising real pay growth and continued strength in the labour market should see improvement compared to 2025. Experian estimates that retail sales volumes grew by 1.3% in 2025.

3.12 Convenience spending has experienced an ongoing wind-down, following a large contraction of -1.5% in 2025, as convenience spending was predicted to further contract in 2026 and 2027 by about -0.5%. However, growth in retail spending is estimated at +0.5% 2026, and +0.9% in 2027.

3.13 Conversely, following a minor contraction of -0.5% in comparison spend in 2025, Experian predict that comparison spend will grow by 1.2% in 2026 and 1.8% in 2027. The largest growth will be in spending on bulky goods, which is estimated to grow by 4.4% in 2027.

3.14 Leisure sales falling markedly in 2020 (given the Covid-19-related lockdowns), however they recovered lost ground in 2021 and stood higher than pre-pandemic levels by 2022, at £202.3bn nationally. The trend of growth continued with a further growth of 0.7% in 2025. Experian predict this will grow by 0.2% in 2026, and an additional 0.6% in 2027.

Category	2025	2026	2027	2028–32	2033-2041
Retail spend	-0.9	0.5	0.9	1.4	1.4
Convenience goods	-1.5	-0.5	-0.5	-0.2	-0.2
Comparison goods	-0.5	1.2	1.8	2.5	2.6
— of which bulky	-1.0	2.7	4.4	2.1	1.5
— non-bulky	-0.2	0.8	1.3	2.8	3.0
Leisure	0.7	0.2	0.6	1.1	1.0

Figure 3.14.1 **Experian's Identified UK retail spending (including non-store) and leisure spending[13] (2025-2040)**
Source: Figure 1a of Experian Retail Planner Briefing Note 23

[12] Budget 2025 in full - GOV.UK
[13] Experian, Retail Planner Briefing Note 23, March 2026

Online Shopping

3.15 The rise in internet retailing has been at the forefront of retail evolution for several years. COVID-19 accelerated this trend.

3.16 Generally, Experian shows that growth in non-store retail is expected to be maintained, particularly through the wider adoption of commonplace technology such as mobile phones and tablets combined with 5G and fibre optic networks, faster delivery times, and easier returns processes to make internet shopping even more convenient. Experian expects that market share will continue to grow strongly in the mid-term, whereby by 2040, 37.1% of retail expenditure will be spent online. The pace of e-commerce growth is anticipated to moderate over the long term but will rise again to a peak of 30.8% (seen in 2021 as a result of Covid-19) by 2030.

Figure 3.16.1 **Experian's Identified and Forecast Market Share of Non-Retail Sales**[14]

Volume Growth Per Head (%)	2025	2030	2035	2040	% Change
Total	27.8%	30.8%	33.9%	37.1%	+9.3
Convenience goods	17.6%	20.0%	22.2%	24.5%	+6.9
Comparison goods	34.5%	36.9%	39.1%	41.4%	+6.9

Source: Figure 5 of Experian Retail Planner Briefing Note 23

Conclusion

3.17 Retail has been an industry under significant stress, as many retailers find themselves squeezed between rising costs and the increasing volume of sales over the internet. Such difficulties have, of course, been exacerbated by the Covid-19 pandemic and the cost-of-living crisis associated with rising energy prices and inflation. In response to this unpredictability, those operating in the market are forced to adapt quickly or otherwise face falling profits.

3.18 There will still be the need and demand for physical stores, despite the increase in shopping online. This is particularly the case for convenience goods sales since the online shopping orders are typically picked from the shelves of physical stores. In respect of comparison goods, there is a need for the offer to become more 'experiential' to encourage shoppers onto the high street, and to ensure that shopping is viewed as a pleasurable pastime. The shopping experience needs to evolve and diversify both to attract footfall and convert increased activity into sales. Independents clearly have an important role to play in adding interest and in providing differentiation between shopping venues.

3.19 Whilst there may be a demand for more physical stores, the increases in cafes and restaurants in town centres have boosted the economy in the town centres and reduced the number of empty units.

3.20 In a market disrupted by continued changes in consumer behaviour, investing in the consumer experience is anticipated to be the key to success in securing resilience in retail stores moving forward. Planning policy can play an important role in helping to future-proof town and village centres against the ongoing uncertainty.

[14] Experian, Retail Planner Briefing Note 23, March 2026

4. Town Centre Health-Checks

Methodology

4.1 Health checks are recognised as important planning 'tools' for appraising and monitoring the changes in the overall vitality and viability of town centres and informing both plan-making and decision-taking at the local level.

4.2 Health checks are recognised as important planning 'tools' for appraising and monitoring the changes in the overall vitality and viability of town centres and informing both plan-making and decision-taking at the local level.

4.3 In this context, this Study provides detailed health check assessments for Hinckley Town Centre and the three district centres of Earl Shilton, Barwell and Market Bosworth.

4.4 All of the health checks have been carried out in accordance with the PPS5: Retailing and Town Centres[15], which sets out a number of key performance indicators used to help assess and monitor the overall health and performance of the centres. This has informed the creation of a SWOT assessment, with the general methodology set out below.

4.5 Household surveys were also used to gather qualitative findings on attitudes and perceptions of different centres. The household survey was undertaken by NEMS Market Research and covered a Study Area comprising eight zones based on postal sectors (a study area map is contained in **Appendix B**). To allow for comparisons between the findings of the previous 2017 Town and District centres Study and the findings of this study, we have adopted the same Study Area that was used in 2017. A total of 700 interviews were carried out across the seven zones in March of 2026. This is corroborated for its statistical accuracy, relative to population, by NEMS in their report in **Appendix C**. A full description of the research methodology, sampling size, weightings, and sample profiles is contained at the beginning of the NEMS report. NEMS quote their work as being within a 95% confidence range.

SWOT Assessment

4.6 The Nexus SWOT assessment has been formulated to encompass the following:

1. Retail Offer – Using observations from site visits carried out in March 2026, we examine Experian GOAD categories, i.e. convenience, comparison, service uses, and vacant units. We compare the results against current UK average benchmarks for each category (Experian Category Report, 2025) for all centres and shopping locations covered by Experian. We also look at results from the previous Hinckley & Bosworth Town and District centres Study from February 2017, wherein a review of composition was undertaken by GVA in the summer of 2016 and supplemented by GOAD data. The 2025 dataset used in this study is more comprehensive than the 2016 data underpinning the 2017 assessment, as it includes a detailed breakdown of service categories that was not available in the earlier GOAD report. These categories include financial & business services, leisure services, and retail services.

2. Vacant Units – We contrast the current vacancy rate with the previous 2017 study and the current UK averages. We also consider any vacancy 'hot-spots' and the reasoning why those might have occurred.

3. Retailer Representation – We review the composition mapping and distribution of retailers to assess the proportion of businesses that are independent traders or national multiples and assess the representation of retailers in each of the centres.

[15] Planning Policy Statement 5, 1996

4. Visitor Satisfaction – Visitor Satisfaction is derived through analysis of answers to Questions 32-35 of the Household Telephone Survey on residents' likes and dislikes, and potential improvements for each centre.

5. Community Involvement & Facilities – We review the level of engagement between the local authority, local business, and the community, through appraising publicly available information, in addition to our on-site observations, this includes a review of community facilities located within or close to the centre. We also examine the level of community engagement in each centre and detail any events for which each centre is renowned.

6. Historic Environment - An assessment of the historic environment is undertaken using Historic England mapping, along with a review of local conservation areas and locally designated heritage assets.

7. Pedestrian Flows – Footfall data has been provided by HBBC, and comments have been made based on on-site observations.

8. Access and Car Parking – This is a Nexus assessment of how easy a centre is to reach, public transportation options, and access by other modes (such as cycling or walking). In addition, car parking is assessed based on its quantity and quality.

9. Environmental Quality – A Nexus assessment of environmental quality, including general cleanliness and attractiveness, the quality of buildings and the quality and provision of open spaces.

10. Perception of Safety - The perception of safety in each centre has been assessed using site visit observations as well as crime data provided by the Leicestershire Police, and considers factors such as lighting, natural surveillance, and traffic safety.

11. Daytime/Nighttime Economy – Using comparison data collected, we assess businesses that typically operate beyond the standard working day, such as restaurants, takeaway units, and public houses.

12. Unhealthy Businesses - Looking at 'unhealthy' businesses is important to understand the levels of health a centre is promoting. The Royal Society for Public Health (RSPH) published a report in 2018 titled 'Health on the High Street: Running on empty'. The report uses "the Richter scale of health"[16] to measure the healthiness of different types of shops and other businesses on the high street. Vacant shops, tanning shops, off-licences, fast food outlets, bookmakers, and high-cost credit outlets have been deemed the least health promoting and are the categorisation in which this report will analyse as 'unhealthy' businesses. Importantly, this categorisation does not mean that these businesses are not capable of positively contributing to the footfall and vitality of a centre. Instead, it is a measure of whether any over-concentration of such uses might not be beneficial to that centre. Vacant shops represent a reduction in community assets and are considered to negatively affect the feel of the High Street, as mentioned in the RSPH Report 14, and therefore, empty shops are categorised as unhealthy uses.

4.7 Full health checks for Hinckley, Earl Shilton, Barwell and Market Bosworth have been included in Appendix A. A summary of each centre is set out below.

[16] RSPH, 'Health on the High Street: Running on empty' (2018)

Hinckley Town Centre

4.8 Hinckley town centre has a diverse array of retailers that draw in visitors from surrounding residential areas and other smaller centres. The centre is benefiting greatly from the establishment of the Crescent retail and leisure development, which has a good array of retailers and the large Sainsbury's supermarket. The centre is particularly well provided for in terms of leisure services and also benefits from the location of the hospital and associated medical centres and clinics, which would bring spin-off visits and trade, particularly during the week. Overall, the centre is considered to be healthy, particularly as the provision of vacant units is below the national average. However, concerns are raised by the clustering of vacant units around the main retail area of Castle Street, Market Place, and the Britannia Centre. There has been a lot of movement in the centre since 2017, both when the previous retail study was undertaken, and since February 2025, when the latest GOAD survey was undertaken. Our in-person centre review revealed that many units had since become vacant, occupied or relocated within that short time. A key takeaway is that Hinckley is a centre that is in flux.

Earl Shilton District Centre

4.9 Earl Shilton district centre is a linear parade of shops along Wood Street/The Hollow, which runs through the centre of it. Unit sizes are predominantly small-scale and 2-storey. There is a mix of commercial uses and a centrally located full-size Co-op store. There are also several community uses, including the Earl Shilton Library, the parish Council offices, the Methodist Church, and associated pre-school, as well as the Heath Lane Surgery. Overall, we consider the centre to still be performing its designated role as a district centre in terms of meeting the needs of local residents within the catchment, by providing facilities for convenience shopping and service uses (hairdressers, health, and medical and beauty salons and the like). Consideration should be given to the number of takeaway units provided, which make up a significant proportion of the centre, and were noted by participants of the household survey. Further work to enhance the shopfronts would assist in improving the overall vitality of the district centre.

Barwell District Centre

4.10 Barwell district centre comprises a linear shopping parade from High Street to the intersection with Chapel Street and Shilton Road. There is a centrally located Co-op store, located at the High Street/Chapel Street Junction, creating a focused hub of the centre. The newly constructed Barwell Medical Centre provides a critical local medical provision to this highly localised centre. Overall, Barwell is a district centre which is relatively well connected by public transport and benefits from a strong walk-in catchment from the surrounding residential areas. The offer is mixed and provides a good range of retail, leisure, service, and wider community uses to meet the residents' needs, but it predominantly includes leisure and retail service uses, which are dominated by beauty services and takeaways. The proportion of vacant units is below the national average in terms of the number of units and has remained around a similar number since 2015. However, a diversity in land uses could be achieved through the occupation of these vacant units. Overall, Barwell district centre is considered to be generally vital and viable, benefiting from robust daytime and night-time economies that befit its status as a district centre, good accessibility and elements indicating that the centre has a positive environmental quality, but has room for improvements. In particular, consideration should be given to improving wayfinding signage to the George Ward community centre or improving pedestrian connections to the centre from Church Street.

Introduction

4.11 This section details existing market shares and assessment of the capacity for new retail and leisure floorspace over the period 2026-2045, informed by the household survey.

4.12 This section first defines the Study Area and describes the household survey undertaken to inform this study. It summarises the key findings on internet shopping patterns and delves into the survey-derived market share analysis for convenience and comparison goods spending at 'bricks and mortar' locations.

4.13 From our market share analysis, we derive the quantitative capacity for new retail (comparison and convenience goods) floorspace in Hinckley and Bosworth, covering the period from 2026 to 2045. We also consider the future capacity for commercial leisure floorspace over the same timeframe.

Market Bosworth District Centre

4.14 Market Bosworth district centre is the smallest of the four centres, focused around the War Memorial and the intersection of Market Street and Main Street. The modest Co-op is not considered to anchor the centre, with the main attraction to the centre being its leisure and retail service offer, and proximity to schools. The provision of public houses, cafes, restaurants, and takeaway units is considered to be the provision that most supports the centre, encouraging local and tourist visitors. This, in turn, supports the comparison offer of independent boutiques and gift shops. For a centre of this size, the limited provision of convenience goods is not unexpected. However, there has been a reduction since the last study, and the centre could benefit from increases in specialist retailers, such as a bakery or butcher. Whilst vacancy has increased in the centre, the units are not expected to be vacant long, and the pedestrian activity was appropriate for a centre of this size. In addition to the introduction of a one-way gyratory and timed parking in Market Place in June 2025, there is an opportunity to further enhance the Square, as the main focal point of the centre. This could be done by restructuring the car parking area, which would encourage most lingering in this area, which is currently car-dominated. Overall, the centre reflects a well-preserved heritage market town which maintains a welcoming and local atmosphere that seeks to capture tourist trade.

4.15 A detailed 12-point SWOT assessment of each centre is set out in **Appendix A**. This includes detailed composition and vacancy mapping, images, and potential opportunities.

5. Market Shares and Capacity Assessment

Household Survey & Study Area

5.1 Household surveys are recognised across the retail industry and within planning policy guidance as an excellent means of understanding where people within a specified area carry out their retail and leisure expenditure. We have therefore commissioned a household survey and utilised the results to inform our quantitative analysis of the turnover of specific retailers, towns, and other destinations, as well as its qualitative findings on attitudes and perceptions of different centres.

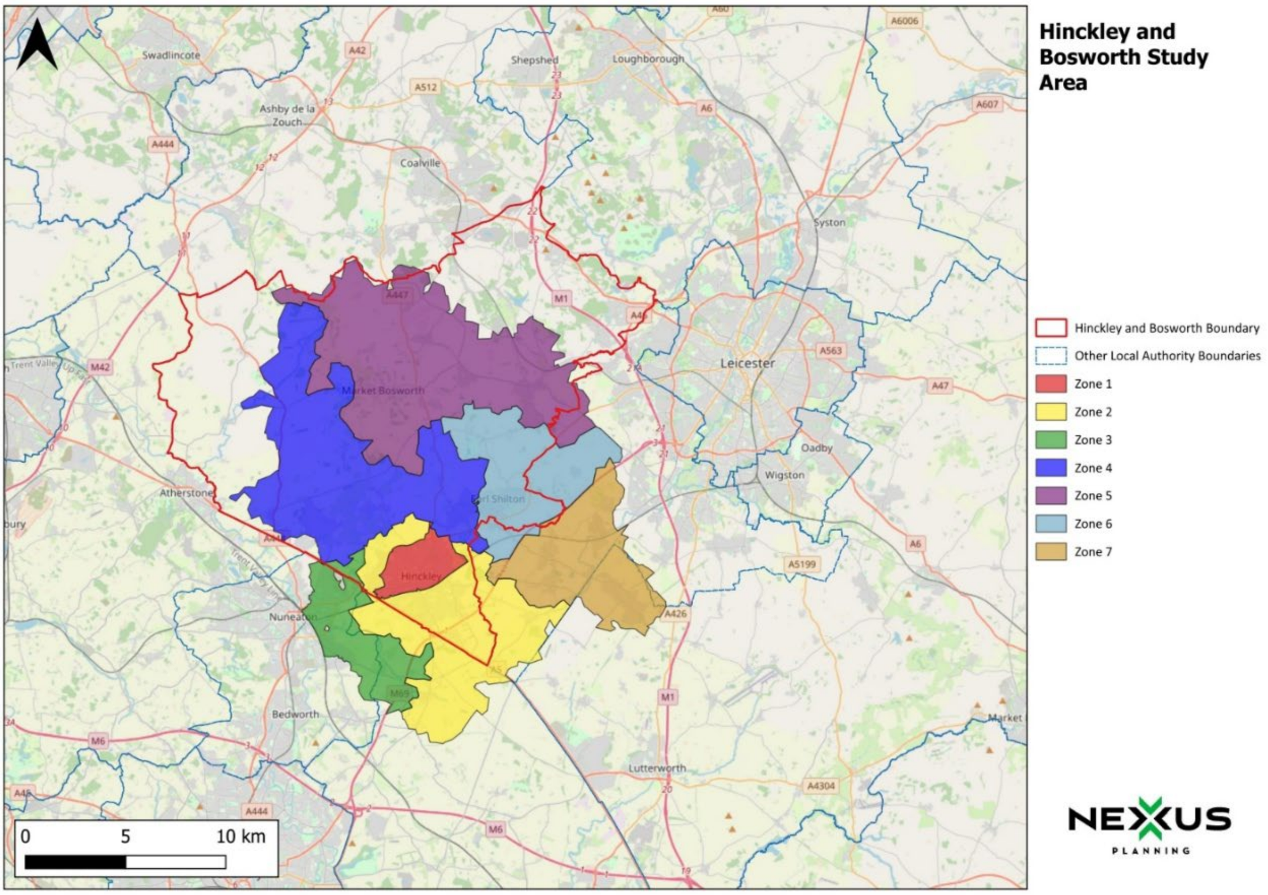


Figure 5.1.1 **Study Area (Appendix B)**

5.2 It is important to identify a Study Area that covers the key area of interest, which can be seen in Figure 5.4.1 above, and **Appendix B** of this report. To allow for direct comparisons between the findings of the previous 2017 Town and District centres study and the findings of this study, we have adopted the same Study Area that was used in 2017. The Study Area is further broken down into seven zones, which are defined on the basis of postal sectors. Zones 1, 2, 4, 5 and 6 broadly align with the boundary of the local authority. However, a significant proportion of Zone 2 lies outside the authority boundary.

5.3 The table below details the postal geography of each Zone:

Figure 5.3.1 **Study Area Zones**

Zone	Postcode Sectors	Number of Interviews
1	LE10 0/1	100
2	LE10 2/3	100
3	CV11 6	100
4	LE9 8, CV13 6	100
5	LE9 9, CV13 0	100
6	LE9 7	100
7	LEP 3/4/6	100
Total		**700**

Source: Appendix B

5.4 A total of 700 interviews were carried out across the seven zones in March of 2026. This is corroborated for its statistical accuracy, relative to population, by NEMS in their report in **Appendix C.**

5.5 A full description of the research methodology, sampling size, weightings, and sample profiles is contained at the beginning of the NEMS report. NEMS quote their work as being within a 95% confidence range.

Study Area Population

5.6 The application of Experian population projections when forecasting retail and leisure capacity is an industry standard. For Zones 1-7, those outside of the local authority boundary, we have sourced population projections from Experian AppLibrary data (2024 report).

5.7 We present the population projections on a zone-by-zone basis in Figure 5.10.1 below.

Figure 5.7.1 **Population projections, 2026-2045**

Zone	Population					
	2026	2031	2036	2041	2045	% change
1	35,165	36,951	38,658	40,547	41,667	18%
2	19,833	20,610	21,278	21,873	22,211	12%
3	19,584	20,022	20,416	20,860	21,086	8%
4	15,012	15,622	16,205	16,708	17,010	13%
5	15,164	15,793	16,299	16,655	16,803	11%
6	13,498	14,214	14,870	15,562	15,972	18%
7	22,451	23,647	24,714	25,766	26,388	18%
Total	**140,707**	**146,859**	**152,440**	**157,971**	**161,137**	**15%**

Source: Table 1a, Appendix D (Population derived from Experian MMG3 data (2025 report))

5.8 As seen, the population of Zones within the borough is expected to increase by 15% between 2026 and 2045, and anticipated growth is up to 18% in the other Zones.

Non-Store Retailing or Special Forms of Trading

5.9 Special forms of trading (SFT) are defined by Experian as sales via the internet, mail order, stalls and markets, vending machines, door-to-door, and telephone sales, including online sales by supermarkets, department stores, and catalogue companies.

Convenience Goods Online Shopping

5.10 The household survey asked residents of the Study Area where they normally undertake their main food and grocery shopping.

5.11 Across the Study Area, 10.72% of respondents usually shop online for their main food shop (Question 1 of the household survey). As set out in Section 2, the UK average for online convenience shopping in 2025 is 17.6%. As such, the take-up of online convenience shopping in the Study Area is much lower than the UK average.

Comparison Goods Online Shopping

5.12 The household survey asked where respondents usually shop for different types of comparison goods. The findings are presented in Figure 5.15.3 below, which shows that the take-up for online shopping varies across the categories, from 21.69% (Furniture, carpets, and floor coverings) to 59.8% (toys/games/bicycles and recreational goods). On average, within the Study Area, 34.3% of respondents shop online for comparison goods, which is right in line with the UK average of 34.5% for 2025. This would suggest that there is a good level of opportunities for in-person comparison shopping in the area.

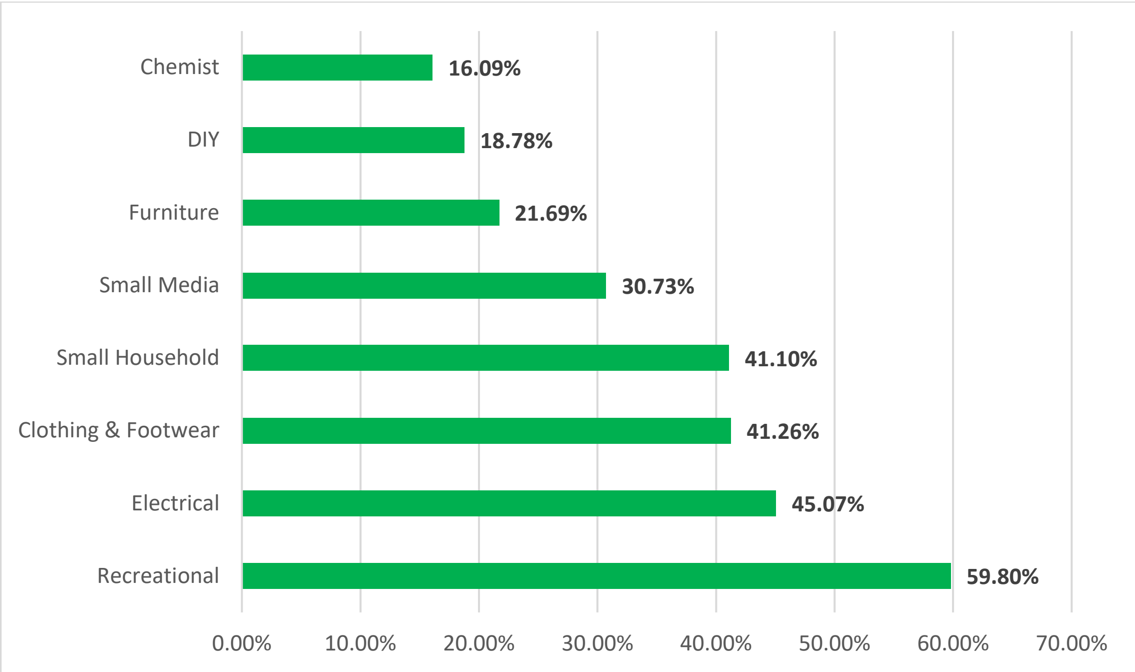


Figure 5.12.1 **Online Comparison Goods Spending in the Study Area**

Source: Appendix C

Retail Expenditure Forecasts

5.13 Having examined where online spending is focused, we now examine that proportion of spending which is carried out at ‘bricks and mortar’ stores.

5.14 Retail expenditure data has been sourced from our in-house Experian AppLibrary software. We obtain separate data for convenience and comparison goods, which in turn are broken down into multiple goods categories, as set out in our full statistical assessment in **Appendix D**.

5.15 The data takes account of the socio-economic characteristics of the local population to provide local consumer expenditure calculations. Experian is a robust source of population and expenditure data that is widely used for calculating retail capacity across the industry.

5.16 Expenditure data from Experian is provided per capita in 2023 prices, as is every subsequent monetary value. Using the growth rates presented in Figure 7 of Experian Retail Planner Briefing Note 23 (March 2026), which are reproduced in Figure 5.20.1 the per capita expenditure is then projected forward to the base year (2026) and the relevant assessment years. Adjustments are made at every step to account for the growth in special forms of trading (SFT).

5.17 There are two elements that should be noted here:

- Experian notes that long-term forecasts should be treated with caution, and that they should be subject to regular reviews given the wide range of factors that can influence the broader national economy. Experian produces annual updates to reflect this, and as we go on to discuss in our recommendations later in the report, we would advise that some of the expenditure data inputs (e.g. growth rates and base per capita spending figures) in this report be revisited on a regular basis.

- Special forms of trading (SFT) are defined by Experian as sales via the internet, mail order, stalls and markets, vending machines, door-to-door, and telephone sales, including online sales by supermarkets, department stores, and catalogue companies. As we have mentioned previously, Experian Retail Planner Briefing Note 23 (March 2026) provides estimated year-on-year forecasts of internet and other SFT, which allows us to 'strip out' any expenditure that is, either now or in the future, diverted to SFT. This ensures that the increasing propensity to shop by SFT is accounted for in our modelling. These increasing deductions for SFT have the effect of offsetting some of the growth in expenditure in the Study Area derived from population increases. Furthermore, many brands offer online sales but source the goods from their own stores' shelves. This is often the case for food stores where employees will pick online orders from stores' shelves before, during or after opening hours. These orders are then delivered by dedicated vans from each store, and as such, the online expenditure is attributed to the tangible stores. Experian provides 'adjusted' figures to account for this.

Figure 5.17.1 **'Adjusted' Special Forms of Trading Market Share Forecasts**

Year	Convenience growth rates (%)	Comparison growth rates (%)
2021	-1.9	9.2
2022	-1.9	9.1
2023	-5.2	-11.1
2024	-3	-1
2025	-1.7	-1.1
2026	-0.6	0.8
2027	-0.7	1.2
2028	-0.4	1.7
2029	-0.4	2
2030	-0.5	2
2031	-0.3	2.2
2032	-0.3	2.2
2033	-0.3	2.1
2034	-0.3	2.1
2035	-0.3	2.1
2036	-0.3	2.1
2037	-0.3	2.1
2038	-0.3	2.1
2039	-0.2	2.2
2040	-0.3	2.1
2041	-0.3	2

Source: Figure 7, Experian Retail Planner Briefing Note 23 March 2026

5.18 The expenditure per capita figures are then multiplied by the population of each zone at each of the assessment years. Figure 5.21.1 sets out the resultant outcome of the total 'brick and mortar' comparison and convenience expenditure in the Study Area at the base and assessment years. As seen, growth in comparison expenditure is expected to exceed growth in convenience expenditure considerably, due to the more optimistic growth rates projected at Figure 5.20.1.

Figure 5.18.1 **Retail Expenditure Forecasts in the Study Area (£m)**

	2026	2031	2036	2041	2045	Growth 2026-2045
Convenience (£m)	390.1	397.8	406.7	415.5	418.8	28.6%
Comparison (£m)	481.0	549.2	632.9	727.4	802.9	33.07%

Source: Tables 2b & 8, Appendix D

5.19 Convenience expenditure in the Study Area is forecast to increase by 28.6% to 2045. Despite pessimistic growth rates in convenience spending, the overall population growth in the Study Area effectively cancels this out and results in growth. Comparison expenditure is projected to increase by 33.07%, due to the forecast population increase and coupled with a strong growth forecast in per capita comparison spending, resulting in positive growth overall in the Study Area.

Inflow

5.20 Tourist spending has been estimated using data from the Marketing Leicestershire Scarborough Tourism Economic Activity Monitor (STEAM) Tourism Economic Impacts Report for 2024. The STEAM data is further broken down on an authority basis in respect of visitor numbers, economic impact, and total employment. This provides us with a useful understanding of the proportion of inflow to be assigned to Hinckley and Bosworth in particular. We comment on the importance of this additional data this further later in this section.

5.21 The STEAM report estimates that Leicestershire attracted £1,660.72m of direct and indirect visitor and tourism business expenditure in 2024. This expenditure was divided among the following sectors:

- Accommodation
- Food & Drink
- Recreation
- Shopping
- Transport
- Direct Revenue
- VAT

5.22 This report shows that, in 2024, the 'shopping' category accounted for 22.5% of Leicestershire's direct and indirect tourism expenditure and the 'food and drink' category accounted for 17.1%. Using the aggregated figures for each authority area, also provided by STEAM, we estimate that 16.8% of the proportion of direct and indirect visitor and tourism business expenditure that flowed in Leicestershire in 2024, equating to £62.9m, was used to purchase goods within Hinckley and Bosworth's shops (comparison spend).

Figure 5.22.1 **Tourism Expenditure Distributed to the Shopping Sector in Hinckley and Bosworth in 2026**

Total Tourism Expenditure in Leicestershire in 2024 (£m)	Proportion of Tourism Expenditure Distributed to 'Shopping' Sector in Leicestershire in 2024 (%)	Tourism Expenditure Distributed to 'Shopping' Sector in Leicestershire in 2024 (£m)	Proportion of Tourism Expenditure Distributed to Hinckley and Bosworth in 2024 (%)	Tourism Expenditure Distributed to 'Shopping' Sector in Blackpool in 2024 (£m)
1,660.72	22.5%	374.31	16.8%	62.9

5.23 In addition to the above, the STEAM Report also showed that the 'food and drink' category accounted for 17.1% of the direct and indirect visitor and tourism business expenditure. As such, we estimate that 17.1% of the direct and indirect visitor and tourism business expenditure that flowed in Leicestershire in 2024, equating to £284.64m, was used to purchase goods within Leicestershire's shops (convenience spend).

5.24 It is important to then make a deduction for spending on eating and drinking in restaurants, cafes, and other venues as part of the overarching 'food and drink' category.

5.25 To estimate the visitor spending on groceries and other food and snacks bought in shops only, we then make a deduction for spending on eating and drinking at restaurants, cafes and other venues based on data sourced from VisitBritain. VisitBritain[17] provides further detail on the breakdown of domestic tourism expenditure at a national level and identifies that 33% of total day visitor expenditure across Great Britain is spent on eating and drinking, of which 77% is spent on eating/drinking out in cafes and restaurants etc. and 23% is spent in food bought in shops/takeaways.

5.26 As set out in Table 5.30.1 below, we have applied the above proportions to the total 'food and drink' expenditure figure to calculate the level of inflow to help support convenience goods retailers in the authority area.

Figure 5.26.1 **Tourism Expenditure Distributed to the Food and Drink Sector in Hinckley and Bosworth in 2024**

Total Tourism Expenditure in Leicestershire in 2024 (£m)	Proportion of Tourism Expenditure Distributed to 'Food and Drink' Sector in Leicestershire in 2024 (%)	Proportion of Tourism Expenditure Distributed to 'Food and Drink' Sector in Leicestershire in 2024 (£m)	Proportion of Tourism Expenditure Distributed to 'Food and Drink' Sector in Hinckley and Bosworth in 2024 (£m)	Tourism Expenditure Distributed to Convenience Goods in Hinckley and Bosworth in 2024 (£m)
1,660.72	18.6%	308.89	51.89	11.94

Convenience Goods Findings

Market Shares

5.27 Our analysis begins by reviewing the retention of convenience goods expenditure within each of the seven Study Area zones (i.e. the proportion of expenditure originating within a given zone which is claimed by retailers located within that same zone). This enables an understanding of whether residents are having to travel to meet their convenience goods shopping requirements, or if they are typically able to meet their needs in proximity to where they live. It is accepted that some respondents will live towards the boundary of their respective zones and some trips will therefore be able to be undertaken to nearby zones in a sustainable manner.

5.28 In each case, the top-up shopping retention rates are higher than the main food shopping retention rates, indicating that residents will typically choose convenience destinations closer to home to meet their day-to-day shopping needs such as purchasing a pint of milk or a loaf of bread.

Figure 5.28.1 **Zonal Convenience Goods Retention Rates at 2026**

Zone	Main Food Shopping Zonal Retention Rate 2026 (%)	Top-Up Food Shopping Zonal Retention Rate 2026 (%)	Combined Convenience Goods Shopping Zonal Retention Rate (%)
1 – Hinckley	91.5%	80.4%	88.8%
2 – Hinckley/Burbage	8.5%	46.1%	17.9%
3 – Nuneaton	10.0%	24.9%	13.7%

[17] Great Britain domestic day trips | VisitBritain.org

Zone	Main Food Shopping Zonal Retention Rate 2026 (%)	Top-Up Food Shopping Zonal Retention Rate 2026 (%)	Combined Convenience Goods Shopping Zonal Retention Rate (%)
4 – Barwell	2.3%	33.4%	10.0%
5 – Market Bosworth	5.6%	71.9%	22.2%
6 – Earl Shilton	3.4%	48.9%	14.8%
7 – Broughton Astley	50.2%	83.1%	58.4%

5.29 Table 5.31.1 demonstrates that the highest main food shopping retention is found within Zones 1 and 7, in which over 50% of trips are directed to destinations within the corresponding zones. Within Zone 1 in particular, which covers Hinckley, the principal main food shopping destinations are the Asda on Barwell Lane, attracting 22.6% of Zone 1 main food shopping trips, the Sainsbury's on Rugby Road (18.0%) and the Morrisons on Normandy Way (16.1%).

5.30 The lowest main food shopping retention rates are found in Zones 2 (6.7%) and 5 (15.3%). In both cases, residents are choosing large format convenience destinations outside of the corresponding zone to meet their convenience needs.

5.31 Turning to top-up convenience shopping, overall, the retention rates are higher within each zone, which demonstrates the propensity of residents to shop locally to undertake their day-to-day 'basket' shops. The highest retention level is found in Zone 7 at 83.1%, with the lowest in Zone 3 at 24.9%. The market share for top-up shopping in each zone is generally spread out across a higher number of destinations, including the smaller operators such as the Co-op stores, the Sainsbury's Locals, and the Tesco Express'.

5.32 Overall, we find that the broad zonal retention rates identified appear to appropriately reflect the geography of current provision. There may well be scope to improve local retention rates subject to provision coming forward in appropriate locations in the future.

5.33 The Table above focuses on the level of convenience expenditure retained at convenience destinations within each of the respective zones. The below Table 5.37.1 provides a different assessment of shopping patterns, this time setting out the proportion of zonal convenience goods expenditure which is claimed by operators located within the borough as a whole (i.e. the proportion of convenience expenditure generated by residents within each zone which is then spent at all destinations within the borough).

5.34 The Table identifies that the highest proportion of expenditure attracted to destinations within the borough for both main and top-up convenience shopping occurs within Zones 1, 2, 4, 5 and 6.

Figure 5.34.1 **Hinckley and Boswroth Convenience Goods Market Share by Zone at 2026 and 2027**

Zone	Main Food Shopping Hinckley and Bosworth Market Share 2026 (%)	Top-Up Food Shopping Trips Hinckley and Bosworth Market Share 2026 (%)	Combined Convenience Goods Hinckley and Bosworth Market Share 2026 (%)	Combined Convenience Goods Hinckley and Bosworth Market Share 2027 (%)
1 – Hinckley	97.6%	95.8%	97.2%	97.1%
2 – Hinckley/Burbage	95.2%	96.5%	95.6%	85.2%
3 – Nuneaton	10.7%	8.0%	10.0%	11.2%
4 – Barwell	86.6%	80.7%	85.2%	86.6%
5 – Market Bosworth	64.3%	91.3%	71.0%	49.7%
6 – Earl Shilton	98.1%	96.6%	97.7%	94.9%

Zone	Main Food Shopping Hinckley and Bosworth Market Share 2026 (%)	Top-Up Food Shopping Trips Hinckley and Bosworth Market Share 2026 (%)	Combined Convenience Goods Hinckley and Bosworth Market Share 2026 (%)	Combined Convenience Goods Hinckley and Bosworth Market Share 2027 (%)
7 – Broughton Astley	26.5%	4.0%	20.8%	28.5%
Total Study Area	**68.5%**	**64.9%**	**68.5%**	**66.3%**

5.35 The Table also provides the comparable figures from the 2017 Study on a zonal basis. We can see that for the majority of zones, the convenience market share attracted to the borough's facilities has remained broadly consistent, but with increases in Zones 2 and 5 in particular. The increase in Zone 2 is in part attributable to the new Aldi in Zone 1 and an increase in expenditure attracted to the Morrisons store in Hinckley, and in Zone 5 the increase is again part attributable to the presence of the Aldi in Hinckley, along with increases in market share to the larger format stores including the Asda and Morrisons.

Convenience Goods Capacity

5.36 One of the key aims of this Study is to provide recommendations on the capacity for new retail floorspace over the plan period to 2045. The use of long-term projections should be treated with caution and reviewed regularly to test the accuracy of the forecasts against emerging datasets. External national and international factors can influence the wider performance of the economy, which can have trickle-down effects on local shopping patterns. As discussed in Section 2, one such example has been the economic implications of the lasting impacts of COVID-19, Brexit, as well as ongoing conflict in the Middle East, and political instability globally, all of which have culminated in high inflation.

5.37 Importantly, we also note that any quantitative retail capacity that we may identify across the Study Area does not necessarily equate to justification for new retail floorspace in itself (especially in out-of-centre locations), and any such development would be required to be assessed in line with NPPF policy in terms of impacts on the vitality and viability of town centres, the potential to prejudice emerging town centre developments, and the 'town centre first' sequential approach to site selection. Equally, the converse also applies, and a lack of identified capacity should not specifically rule out retail developments, where other material factors support such development.

5.38 Detailed quantitative retail capacity tables are enclosed in **Appendix D.**

5.39 Retail capacity modelling follows a consistent, robust methodology which incorporates a number of datasets and informed assumptions which we describe further below, but broadly speaking:

Available Expenditure (£m) - Turnover of existing & proposed (£m) = Surplus or Deficit (£m)

5.40 Experian AppLibrary data is used to provide localised expenditure per capita per annum for various forms of retail spending. These figures are then projected forward based on population growth, changes in expenditure over time and Special Forms of Trading (SFT) such as internet shopping.

5.41 The turnover of existing retailers across the Study Area is calculated based on average sales densities, or turnover, per square metre. Various retail planning sources provide average (or benchmark) sales densities for all national multiple retailers.

5.42 The surplus or deficit equates to the difference between the available retail expenditure across the Study Area and the turnover of existing facilities within the Study Area. If the total turnover is greater than the available expenditure, then the model would identify an oversupply of existing retail floorspace, whilst a surplus of expenditure would suggest capacity for additional retail floorspace.

5.43 Once the surplus or deficit of expenditure is calculated, it is then presented in floorspace figures (using average sales density assumptions) to demonstrate the findings within a 'real world' context. Often, surplus figures are presented under a number of different scenarios representing various retailers. For example, discount retailers (such as Aldi and Lidl amongst others) continue to operate at a lower sales density than the traditional 'big 4' (Sainsbury's, Tesco, Asda, and Morrisons). Given the same available 'pot of expenditure', a higher sales density would result in a lower floorspace capacity than a lower sales density, which would result in a higher floorspace capacity.

5.44 Turning now to our detailed findings, as shown in Figure 5.37.1, the household survey results demonstrated that facilities within Hinckley and Bosworth have a 68.5% convenience goods market share of all spending carried out by residents of the Study Area.

5.45 In keeping with standard retail study methodology, when assessing the capacity for new convenience retail floorspace, we adopt a constant market share in line with findings of the latest household survey (i.e. that stores within the borough continue to draw 68.5% of all convenience goods spending from the Study Area). In coming to this view, we have analysed the level of commitments identified through correspondence with Council officers.

5.46 Based on a constant market share, we then allow for growth in retail expenditure over the period to 2045, as well as utilising data provided within the latest Experian Retail Planner Briefing Note 23 (March 2026), in order to take account of forecast growth in retail efficiencies (for example, through the adoption of new technologies and more efficient use of available floorspace). Floorspace efficiencies are estimated to have a greater impact on comparison retailers than convenience retailers over the plan period as the rise of food discounting and disruptions to logistics continue to subdue projected efficiencies in turnover of existing convenience retail floorspace.

5.47 We go on to make a number of statistical assumptions through the quantitative capacity exercise in order to account for the following variables. These are contained at Table 6 of Appendix D and can be summarised as:

- Utilising a 'goods based' approach, we strip out expenditure for non-food comparison goods such as clothing, household goods, CDs, DVDs, and other media that are now commonly sold at major foodstores so that only the convenience goods floorspace is being considered (i.e. on a like-for-like basis with available convenience expenditure). These deductions are made in line with floorspace figures sourced from publicly available databases or, where data is not available, Nexus' professional judgement based on site visits.

- We also make assumptions as to the gross to net convenience goods sales floorspace of each store, again utilising online planning records where available, national rates databases or Nexus' professional judgement.

- Finally, we consider whether foodstores are likely to attract any additional 'inflow' from outside of the Study Area. We provide an overview of our approach to inflow above.

5.48 We then go on to calculate the anticipated turnover of all major convenience goods operators based on the published company sales data, referred to as 'benchmark' turnover. 'Benchmark' turnover is calculated from the national average 'sales densities' (turnover per square metre). By comparing the turnover estimates derived from the findings of the household survey (total available expenditure distributed on the basis of each destination's market share) to the benchmark turnovers, we can establish where stores are trading above (over-trading) or below (under-trading) company averages.

5.49 We then go on to consider committed and extant permissions for new convenience retail floorspace. This includes any developments that have not been built, are currently under construction, or have opened or would not have been operating at the time of the 2026 household survey. We do not take into account proposed allocations for retail floorspace but consider development proposals for which a formal planning application has either been submitted or approved. The Council has confirmed that there are no consents of relevance to the assessment.

5.50 The benchmark turnover of existing floorspace and the turnover of committed floorspace is then grown to account for changes in floorspace efficiencies. The Experian RPBN 2023 provides forecasts of how sales efficiencies of convenience and comparison floorspace will change over the period to 2040, which are reproduced in Figure 5.53.1 below.

Figure 5.50.1 **Retail sales densities for convenience and comparison goods, including changes to floorspace**

Year	Convenience growth rates (%)	Comparison growth rates (%)
2024	-3.4%	0.4%
2025	-0.7%	-0.2%
2026	0.0%	1.3%
2027	0.0%	1.8%
2028	0.0%	2.3%
2029	0.0%	2.3%
2030	0.0%	2.3%
2031	0.0%	2.3%
2032	0.0%	2.3%
2033	0.0%	2.3%
2034	-0.1%	2.3%
2035	-0.1%	2.3%
2036	-0.1%	2.3%
2037	-0.1%	2.3%
2038	-0.1%	2.3%
2039	-0.1%	2.3%
2040	-0.1%	2.3%
2041	-0.1%	2.3%
2042	-0.1%	2.3%
2043	-0.1%	2.3%
2044	-0.1%	2.3%
2045	-0.1%	2.3%

Source: Figure 4b, Experian Retail Planner Briefing Note 23, March 2026

5.51 As seen, convenience sales densities are expected to stagnate before declining gradually year on year from 2034 onwards.

5.52 In identifying the requirement for additional convenience goods floorspace, the estimated turnover of the existing collective provision (with reference to the shopping patterns established by the household survey) is compared to its benchmark turnover (calculated with reference to company average sales densities and the net convenience goods sales areas of individual stores). The identified benchmark turnover changes across future reporting years to account for Experian's forecasts in respect of the future sales efficiency of convenience goods floorspace).

5.53 As Table 5.56.1 demonstrates, convenience goods floorspace across the authority area has a survey-derived turnover of £267.4m and an expected benchmark turnover of £219.4m. Once inflow is taken into account, a convenience expenditure surplus of £59.9m is identified in 2026, which increases to £65.2m by 2031. By 2045, the surplus in expenditure increases to £82.5m.

Figure 5.53.1 **Quantitative Capacity for Additional Convenience Goods Floorspace in the Hinckley and Bosworth Borough**

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Inflow (£m)	Surplus Expenditure (£m)
2026	219.4	267.4	11.9	59.9
2031	219.4	272.7	12.0	65.2
2036	218.8	278.8	12.0	72.0
2041	217.7	284.8	12.0	79.2
2045	216.6	287.0	12.1	82.5

Source: Table 6ai of Appendix 4
Notes: Assumes constant market share (68.5%) of Study Area expenditure claimed by facilities within Hinckley and Bosworth authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 4b of Experian Retail Planner Briefing Note 23; in 2024 prices.

5.54 Table 5.56.1 identifies a positive monetary surplus across the entirety of the plan period to 2045. In practice, our assessment suggests that there will be an effective quantitative undersupply of floorspace (equating to between 7,400 and 8,800 sq.m of convenience goods floorspace at 2045). Looking ten years ahead, as advocated by the Town Centres Practice Guidance, the identified convenience capacity is for between 6,400 and 7,600 sq.m of additional floorspace across the borough.

Figure 5.54.1 **Quantitative Capacity for Convenience Goods Floorspace in the Hinckley and Bosworth Borough after Commitments**

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2026	59.9	0.0	59.9	5,300	6,300
2031	65.2	0.0	65.2	5,800	6,900
2036	72.0	0.0	72.0	6,400	7,600
2041	79.2	0.0	79.2	7,100	8,400
2045	82.5	0.0	82.5	7,400	8,800

Source: Table 6di of Appendix 4
Notes: Assumes constant market share (68.5%) of Study Area expenditure claimed by facilities within Hinckley and Bosworth authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 4a of Experian Retail Planner Briefing Note 23

Comparison Goods Findings

Market Shares

5.55 The below Table 5.59.1 identifies comparison goods shopping patterns, relating to the proportion of zonal comparison goods expenditure which is claimed by operators located within Hinckley and Bosworth borough.

5.56 In practice, the borough's operators claim more than five out of every ten pounds originating within Zones 1, 2, 4 and 6 within which 59.0%, 60.8%, 55.7% and 52.2%% of comparison expenditure is spent at the respective facilities, respectively. The lowest proportion of expenditure spent at Hinckley and Bosworth borough's destinations is recorded in Zone 3 at 2.3%.

Figure 5.56.1 **Hinckley and Bosworth Borough Comparison Goods Market Share by Zone at 2026**

Zone	Comparison Goods Hinckley and Bosworth Market Share 2026 (%)	Comparison Goods Hinckley and Bosworth Market Share 2017 (%)
1 – Hinckley	59.0%	52.4%
2 – Hinckley/Burbage	60.8%	52.2%
3 – Nuneaton	2.3%	2.3%
4 – Barwell	55.7%	45.1%
5 – Market Bosworth	37.0%	15.1%
6 – Earl Shilton	52.2%	58.3%
7 – Broughton Astley	19.2%	25.8%
Hinckley and Bosworth Borough Total	**41.2%**	**36.2%**

5.57 The identified market shares are generally encouraging and are reflective of the fact that a good number of day-to-day comparison goods can be sourced close to home.

5.58 The Table above also provides the comparative figures for each zone as identified in the 2017 Study. We can see that for all zones except Zone 7, the comparison goods market share based on available expenditure attracted to the borough's facilities has increased or remained the same.

5.59 This increase in comparison goods market share is a positive sign that the borough's comparison destinations are retaining a greater level of expenditure when compared to 2017.

Clothing and Footwear

5.60 In reviewing the comparison shopping patterns within the Study Area, the analysis focuses on the eight separate categories of goods which fall within the 'non-bulky' and 'bulky' comparison goods sectors.

5.61 However, given the dominance of the clothing and footwear market and the level of expenditure which is spent on such goods (approximately 23.7% of residents' expenditure), we focus firstly on the clothing and footwear patterns, followed by a summary of the other seven categories below. Clothing and footwear retailing has traditionally been the bedrock of town centres' retail offer, and it can therefore be a useful barometer of the popularity of high streets. Comparison goods purchases are generally made less often than convenience purchases, and residents are often willing to travel greater distances to meet their comparison shopping needs. As such, levels of zonal retention are often lower than those which are established by convenience goods.

5.62 Table 5.62.1 below provides the proportions of clothing and footwear shopping patterns to key destinations within the borough, and the proportion retained in the borough as a whole. The Table also provides details of the principle destinations outside of the Study Area which are also attracting trips from residents in the borough.

Figure 5.62.1 **Clothing and Footwear Patterns on a Zonal Basis to Principal Destinations in the Borough**

Zone	Destination	Zone 1 2026 (%)	Zone 2 2026 (%)	Zone 3 2026 (%)	Zone 4 2026 (%)	Zone 5 2026 (%)	Zone 6 2026 (%)	Zone 7 2026 (%)	Total 2026 (%)
1	Hinckley Town Centre	16.2%	22.4%	0.0%	11.5%	13.9%	10.7%	11.7%	13.6%
1	Sainsbury's Superstore, Hinckley	6.1%	8.0%	0.9%	6.3%	0.7%	5.0%	3.1%	4.8%
1	Asda, Hinckley	2.3%	4.7%	0.0%	6.3%	1.5%	0.6%	0.8%	2.5%
1	Morrisons, Hinckley	4.9%	5.3%	0.0%	0.0%	0.0%	0.6%	0.0%	2.3%
	Hinckley and Bosworth Borough Sub-Total	**36.1%**	**47.0%**	**0.9%**	**30.0%**	**16.2%**	**24.8%**	**20.1%**	**28.2%**
OSA	Fosse Park	48.3%	29.4%	30.3%	28.0%	59.4%	56.3%	72.9%	46.5%
OSA	Ventura Retail Park, Tamworth	4.4%	0.0%	9.4%	8.9%	5.0%	0.0%	0.0%	3.6%
OSA	Nuneaton Town Centre	1.5%	0.8%	14.7%	5.8%	0.0%	0.0%	0.8%	2.9%

5.63 We can see from the Table that for all zones except Zone 3, over 10% of their clothing and footwear shopping trips are to Hinckley town centre, with the highest percentage from Zone 2 residents. Looking outside of the Study Area, Fosse Park is a key destination for all residents, with the highest proportion of trips being from Zone 7 residents.

5.64 Overall, it is clear that Fosse Park is a key attractor of shopping trips for the borough's residents, indicating that Hinckley and Bosworth's defined centre's clothing and footwear offer is less strong and Fosse Park (and surroundings) has a real draw for residents to purchase such goods.

Other Comparison Goods Shopping Patterns

5.65 As set out above, given the proportion of expenditure spent on clothing and footwear goods, it is useful to understand in more detail where such trips are taking place. We also provide below in Table 5.65.1 a breakdown of the seven other comparison categories on a zonal basis, looking at the borough's retention rate.

Figure 5.65.1 **Hinckley and Bosworth Borough Comparison Patterns on a Zonal Basis**

	Zone 1 2026 (%)	Zone 2 2026 (%)	Zone 3 2026 (%)	Zone 4 2026 (%)	Zone 5 2026 (%)	Zone 6 2026 (%)	Zone 7 2026 (%)	Total 2026 (%)
Clothing and Footwear	36.1%	47.0%	0.9%	30.0%	16.2%	24.8%	20.1%	**28.2%**
CDS, DVDs and Books	86.0%	79.1%	1.0%	82.9%	61.0%	87.6%	41.6%	**62.7%**
Small Household Goods	35.9%	38.3%	0.0%	48.6%	20.4%	54.9%	12.4%	**28.3%**
Toys, Games, Bicycles and Recreational Goods	82.3%	70.5%	2.0%	91.8%	30.3%	59.1%	17.7%	**43.5%**
Health and Beauty Goods	86.5%	90.1%	0.4%	83.3%	60.8%	92.9%	16.0%	**59.9%**
Electrical Goods	42.4%	45.8%	1.4%	14.8%	31.0%	12.7%	10.7%	**23.1%**
DIY and Gardening Goods	82.1%	73.4%	13.8%	86.8%	75.3%	81.1%	46.3%	**63.3%**
Furniture, Carpets and Floor Coverings	51.6%	53.8%	4.6%	41.4%	45.5%	71.7%	8.8%	**37.7%**

Market Share Summary and Identification of Expenditure Claimed by Hinckley and Bosworth Retailers

5.66 We identify the convenience goods, comparison goods, and overall market share of Study Area expenditure claimed by retailers located in the borough in the below table.

5.67 The authority area's convenience market share at 68.5% is more than the comparison market share at 41.2%. This is not unsurprising given the presence of the comparison facilities in and surrounding Fosse Park which are attracting trips from residents in the authority area.

Figure 5.67.1 **Hinckley and Bosworth Borough Convenience and Comparison Goods Expenditure Retention and Leakage**

Type of Expenditure	2026 Residents' Expenditure (£m)	2026 Market Share (%)	2017 Residents' Expenditure (£m)	2017 Market Share (%)
Study Area Convenience Goods Expenditure	267.4	68.5%	174.9	66.3%
Study Area Comparison Goods Expenditure	198.3	41.2%	159.6	36.2%
Total Study Area Expenditure	465.7	53.5%	334.5	29.7%

Source: Table 25 of Appendix 4, not including inflow
Note: Both presented in a consistent 2024 prices

5.68 The increase in convenience and comparison goods turnover in particular is substantial and are attributable to two principal factors:

- population and per capita expenditure increases, meaning that the overall comparison goods expenditure 'pots' have increased; and
- general improvements in the market share of expenditure claimed by retailers located in the borough.

5.69 In conclusion, the household survey demonstrates that overall, the borough's convenience goods retailers are able to appropriately serve residents of the authority area and those who live in a wider catchment area.

5.70 In respect of comparison goods, the borough's facilities are retaining a greater level of expenditure when compared to the findings of the 2017 Study, but large format out of centre destinations including Fosse Park, continue to draw trade away from the borough.

5.71 In our view, the identified survey results reflect the geography of the Study Area and the relative attraction of other nearby retail venues. Accordingly, where expenditure 'leaks' to destinations outside of the borough, this is still generally reflective of logical and sustainable travel patterns, insofar as residents are not travelling extensive distances to meet their requirements.

Comparison Goods Capacity

5.72 The methodology for calculating capacity for comparison goods floorspace differs from that used to model capacity for convenience goods floorspace. The principal reason for this is that there are no robust, industry-standard benchmark sales densities for calculating the turnover of smaller independent retailers that typically make up the majority of the comparison provision of town centres (although it is noted that sales densities are published for national multiple comparison retailers).

5.73 Moreover, the trading levels of comparison retailers can fluctuate significantly depending on a number of localised variables, most notably the location of the retailer relative to similar providers (as customers are more likely to link multiple comparison goods trips to retailers in close proximity to each other).

5.74 Table 5.68.1 below indicates that in 2026, the comparison destinations within the borough have an overarching turnover of £198.3m, or £261.2m once the inflow is taken into account. In 2031, the available comparison expenditure is estimated to be £9.9m, rising to £20.6m in 2036. By 2045, this available expenditure rises again to £57.2m.

Figure 5.74.1 **Quantitative Capacity for Additional Comparison Goods Floorspace in the Hinckley and Bosworth Borough**

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Inflow (£m)	Surplus Expenditure (£m)
2026	261.2	198.3	62.9	0.0
2031	288.4	226.4	71.8	9.9
2036	323.1	260.9	82.8	20.6
2041	362.0	299.9	95.1	33.0
2045	378.9	331.0	105.0	57.2

Source: Table 6ai of Appendix 4
Notes: Assumes constant market share (41.2%) of Study Area expenditure claimed by facilities within Hinckley and Bosworth authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 4b of Experian Retail Planner Briefing Note 23; in 2024 prices.

5.75 Table 5.69.1 identifies a positive monetary surplus across the entirety of the plan period to 2045. In practice, our assessment suggests that there will be an effective quantitative undersupply of floorspace (equating to between 6,400 and 11,000 sq.m of comparison goods floorspace at 2045).

5.76 Looking ten years ahead, as advocated by the Town Centres Practice Guidance, the identified convenience capacity is for between 2,800 and 4,800 sq.m of additional floorspace across the borough.

Figure 5.76.1 **Quantitative Capacity for Convenience Goods Floorspace in the Hinckley and Bosworth Borough after Commitments**

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2026	0.0	0.0	0.0	0	0
2031	9.9	0.0	9.9	1,500	2,600
2036	20.6	0.0	20.6	2,800	4,800
2041	33.0	0.0	33.0	4,000	6,800
2045	57.2	0.0	57.2	6,400	11,000

Source: Table 6di of Appendix 4
Notes: Assumes constant market share (68.5%) of Study Area expenditure claimed by facilities within Hinckley and Bosworth authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 4a of Experian Retail Planner Briefing Note 23

Convenience and Comparison Qualitative Requirements

Convenience Requirements

5.77 The authority area is relatively well provided for in terms of the larger format convenience operators, with Asda, Sainsbury's, Morrisons and Tesco all occupying large format stores, and the likes of Co-op, Premier, Sainsbury's, and Tesco trading from smaller local convenience store formats. The authority area also includes two Aldi stores within Hinckley and a Lidl store.

5.78 Whilst there may be opportunity for some such retailers to bring forward additional stores in areas likely to be the subject of significant residential growth, it is in the discount foodstore sector where there is likely to be greatest operator interest.

5.79 In this regard, the existing large format convenience provision within Hinckley town centre is over-trading on the whole, and there appears to be a qualitative (and quantitative) need for additional convenience floorspace in and surrounding the town centre in order to alleviate some of the identified over-trading. However, the town centre is relatively confined and there are limited opportunities to further expand the town centre offer on sites within or in very close proximity to the town centre boundary.

5.80 In addition, the Co-op stores in Barwell, Market Bosworth and Earl Shilton are all trading very well and above their expected benchmark averages, indicating that there may be a qualitative demand in the smaller centres of the authority area. However, we have not identified any suitable town centre or edge of centre sites which could accommodate additional floorspace and we therefore do not recommend that the Council plan for additional growth within the local plan.

5.81 Given the above, any proposals for additional convenience goods floorspace should be considered on their own merits in accordance with the relevant planning policy tests. Most particularly, planning applications which seek to provide additional food retail provision should be considered having regard to potential sequential alternative sites, and with reference to the magnitude of impacts arising at any defined centre. The potential qualitative benefits associated with any improvement in customer choice can also be afforded weight in the decision-making process.

5.82 Outside the defined centres, Earl Shilton and Barwell's prospective sustainable urban extensions will provide a new local centre within each. This will absorb a certain capacity of retail and leisure floorspace. For Earl Shilton, an outline application for 1,000 dwellings includes 0.5ha for the envisioned local centre/community hub (E/F1/F2/C3). However, the quantum floorspace for both retail and leisure facilities in isolation is currently not known. In Barwell, an outline application for 2,500 dwellings alongside other uses, included delivery of local retail and commercial units (1,000sqm) and a public house. This application is still pending. As set out in the healthcheck assessments (Appendix A) for Barwell and Earl Shilton, the delivery of local retail alongside the housing developments is crucial to their success, and completion of development will uplift each of the district centres accordingly.

5.83 Finally, Market Bosworth has a limited convenience retail provision, providing only a small Co-op and a greengrocer. As identified in our healthchecks, further diversification through independent convenience retailers (butcher, baker, etc.) could occupy the centre. Given the limits of unit size and parking, establishment of any bigger retailer (convenience or comparison) within the centre is not considered feasible.

Comparison Requirements

5.84 Turning to the qualitative requirements of comparison retailing, it is clear that Fosse Park is the principal non-food retail destination for residents in the authority area and is therefore attracting expenditure outside of the authority area. The comparison goods offer of Hinckley town centre is primarily focussed on meeting day-to-day needs.

5.85 It is of course also of relevance to consider the proximity and ease of access to both Fosse Park and Leicester city centre, for residents within Hinckley and Bosworth, and that providing for a large expanse of additional comparison floorspace within the authority area is unlikely to be commercially viable. Indeed, the offer and types of operators at Fosse Park, which is situated in an accessible and convenient location for a high proportion of residents, ensure that they have good and convenient access to national multiple comparison retailers to meet their needs.

5.86 Given these findings, there is no obvious requirement to develop any substantial further facilities outside of defined centres, beyond those which are or will come forward as part of strategic urban extensions in the authority area. We therefore suggest that any capacity be diverted towards supporting existing, and potentially new, comparison goods retailers within existing defined centres in general and Hinckley town centre in particular. This position can be monitored moving forward.

Leisure Capacity

5.87 The results of the NEMS Household Telephone Survey offer an indication of locations/facilities where residents of the Study Area satisfy their leisure pursuits (namely Indoor Health & Fitness, Cinemas, Restaurants, Pubs/Bars/Nightclubs, Ten-pin Bowling, Bingo, and Cultural Facilities). As such, the survey enables us to analyse patterns of travel and potential deficiencies (those that are qualitative in nature) within the Study Area.

5.88 The modelling of future commercial leisure needs cannot necessarily be based upon the same quantitative model used to estimate retail need. This is because leisure spending is not undertaken regularly and is often influenced by cultural shifts and technological advances.

5.89 Nevertheless, we appraise the existing provision of leisure facilities across the Study Area and compare this against recognised sector ‘standards’ or ‘benchmarks’. The completion of this ‘benchmarking exercise’ allows us to establish deficiencies and identify where gaps in the provision of existing facilities may be.

Market Shares

5.90 The NEMS household survey asked respondents to describe their leisure and cultural activities and habits. The responses to these questions inform our understanding of leisure trends and needs. The breakdown of the answers to these questions is set out in full in Appendix C, and we extrapolate the key results here.

5.91 In the first instance, it is important to have an understanding of the participation rates and general popularity of leisure activities across the Study Area. In Question 37 of the household survey, NEMS asked respondents to identify all of the leisure activities in which they participated (respondents were allowed to identify as many options as they wished). We summarise the results in the figure below.

Figure 5.91.1 **Participation in leisure activities by Zone (%)**

Leisure Activity	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
Indoor sports/health	34.27%	16.96%	29.03%	16.88%	33.81%	9.09%	24.49%	**25.23%**
Cinema	44.52%	29.21%	38.14%	22.57%	34.93%	30.10%	30.17%	**34.44%**
Restaurant	49.91%	59.98%	67.46%	45.64%	60.47%	33.83%	52.42%	**53.27%**
Pub/bars/nightclubs	47.46%	42.67%	40.10%	37.96%	42.62%	40.46%	49.93%	**44.00%**
Ten pin bowling	6.01%	7.28%	9.69%	2.58%	4.55%	9.81%	4.95%	**6.36%**
Bingo	2.79%	0.00%	1.12%	1.16%	0.94%	3.82%	0.44%	**1.51%**
Cultural facilities	43.52%	41.42%	29.41%	28.14%	20.84%	13.84%	34.62%	**33.04%**
Casino	1.93%	0.00%	0.00%	0.00%	0.31%	0.00%	2.96%	**1.00%**
Other competitive social activities	17.17%	11.94%	4.70%	2.58%	7.48%	9.00%	3.39%	**9.16%**
Other	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.00%**
(None mentioned)	19.30%	16.61%	12.99%	25.77%	26.31%	35.32%	12.99%	**19.99%**

Source: Appendix C, Question 37 of NEMS Household Survey

5.92 As evident in the figure above, participation rates vary across different activities and across different zones. The most popular leisure activity is visiting restaurants, at 53.27%, whereas the least popular activity is casinos, with only a 1.51% participation rate.

5.93 NEMS also asked a series of questions (Q38 to Q46) to understand where residents usually undertake their chosen leisure activity. We examine the most popular destinations for residents of the Study Area below.

Figure 5.93.1 **Most Popular Destinations for Leisure Activities**

Leisure Activity	Most Popular		Second Most Popular		Third Most Popular	
Indoor sports or health and fitness activity	Hinckley Leisure Centre, Argents Mead, Hinckley,	33.67%	Broughton Astley Leisure Centre, Broughton Way,	11.15%	Pingles Leisure Centre, Avenue Road, Nuneaton,	8.82%
Cinema	Cineworld, The Crescent, Station Road, Hinckley,	56.70%	Odeon, Bermuda Park, St Davids Way, Nuneaton,	19.73%	Vue, Meridian Leisure Park, Leicester	12.93%
Restaurant	Hinckley Town Centre	34.91%	Nuneaton Town Centre	10.94%	Market Bosworth Town Centre	9.03%
Pub/bar/nightclub / social club	Hinckley Town Centre	27.17%	Nuneaton Town Centre	10.27%	Leicester City Centre	8.31%
Ten pin bowling	Discobowl, The Bermuda Park, St Davids Way, Nuneaton	56.17%	Hollywood Bowl, Lubbesthorpe Way, Leicester,	26.30%	Tenpin, Crosspoint Business Park, Coventry	10.38%
Bingo	Hinckley Town Centre	40.63%	Buzz Bingo, Beaumont Way, Beaumont Leys	11.91%	Earl Shilton Town Centre	8.74%
Cultural facilities	Concordia Theatre, Stockwell Head, Hinckley	17.29%	Curve Theatre, Rutland Street	13.11%	Leicester City Centre	10.83%
Casino	Grosvenor Casino, Highcross Street, Leicester,	59.27%	Coventry City Centre	33.67%	Genting Casino, Riverlights, Morledge, Derby,	7.05%
Competitive Socialising	Hinckley Town Centre	35.46%	Leicester City Centre	31.33%	Birmingham City Centre	7.45%

Source: NEMS Household Survey
Note: Green indicates a centre location

5.94 These results indicate that Hinckley and Bosworth retain more visits for some activities than others. It attracts the most visits for restaurants, pubs/bars/nightclubs, indoor sports, and bingo. For ten-pin bowling, however, none of the top three most popular destinations is in the borough, suggesting that there is poor provision of these kinds of facilities.

Need for Additional Leisure Facilities

5.95 Question 47 of the household survey asked respondents what leisure facilities they would like to see more of in the area.

5.96 The most commonly requested leisure facilities were more facilities and activities for teenagers (13.88%), more facilities and activities for young children (10.81%), more facilities and activities for families (10.37%), and more live music venues (9.56%).

5.97 44.32% of respondents also answered that there were no leisure activities they would like to see more of, which suggests a level of satisfaction with existing provision.

Capacity for Additional Leisure Facilities

5.98 Having identified market shares for a variety of leisure uses, we are able to undertake a 'benchmarking' exercise by referencing the estimated increases in the Study Area's population. The results of the 'benchmarking' exercise have been used to inform our conclusions about the prospective future need for additional commercial leisure facilities.

Health and Fitness Capacity

5.99 The Leisure Database Company[18] outlines that 15.9% of the UK's population are registered members at private health and fitness clubs, meaning that 1 in every 7 people is a member of a gym. In 2024, there were in the region of 7,009 health and fitness clubs operating across the UK (down from 7,239 in 2019).

5.100 In 2022, Statista reported that the average size of mainstream gym, health-club and leisure centre membership in the UK was approximately 2,846 members per club. Building on this, our household survey results showed that approximately 25.23% of residents in the Study Area participate in health and fitness activities (Q37). Of those, the survey results suggest that 71% of residents currently carry out their health and fitness activities within the study area itself (Q38). Accounting for zones in the study area that fall within the borough boundary, this rate drops to 57.85%. This is because Zones 3,7, and parts of zones 2 and 6, are outside of the Hinckley and Bosworth borough Boundary. We term this the 'Borough retention rate' and use it as a benchmark (assumed to be constant) to underpin our assessment of the number of additional facilities that can be supported in the borough over time.

5.101 Based on the current participation rates, attraction rates, and average club size membership identified above, we calculate that residents of the Study Area would support over 8 large indoor health and fitness centres over the Study period to 2045. Demand is projected to increase in line with an increasing population.

Figure 5.101.1 **Health & Fitness Centre Capacity**

Year	Study Area Population	Regular participants @ 25.2%	Borough Retention Rate @ 58%	Average membership	No. of facilities supported
2026	140,707	35,458	20,566	2,846	7
2031	146,859	37,008	21,465	2,846	8
2036	152,440	38,415	22,281	2,846	8
2041	157,971	39,809	23,089	2,846	8
2045	161,137	40,607	23,552	2,846	8

Source: Nexus analysis

5.102 Comparing capacity to supply, the results of Question 38 of the household survey identify approximately 24 recognised indoor health and fitness centres within the borough boundary, which would suggest the existing provision is sufficient to accommodate existing and future demand for health and fitness facilities in Hinckley and Bosworth.

[18] State of the UK Fitness Industry 2024, Leisure Database Company, 2024

Cinema Capacity

5.103 Hinckley and Bosworth Borough only has one cinema, the Cineworld in Hinckley Town Centre, which has 5 screens. The Cineworld attracts 56.7% of cinema trips in the Study Area, according to Question 39 of the household survey.

5.104 In 2024, the UK Cinema Association identified that total UK cinema admissions were 126.5 million[19], equating to just over 1.8 trips per person (per year? per month?). This is a significant decrease from 2019, pre-COVID, when admission numbers were at 176 million. In 2024, they also identified 823 cinema facilities with 4,587 screens in the UK. Based on this data, the UK yearly average was 27,578 cinema trips per screen.

5.105 As shown in the figure below, we have carried out an exercise to calculate how many cinema screens the Study Area residents could theoretically support. In order to gauge the number of cinema screens that can be supported in the Study Area over the Study period, we have calculated the anticipated cinema attendance (based on the national average of 1.8 trips per person) and by assuming that the borough continues to attract 56.7% of cinema visitors. This identifies a capacity for almost 6 screens by 2045. There are currently only 5 cinema screens in the borough, which suggests potentially latent demand for a small number of cinema screens by the end of the Study period.

Figure 5.105.1 **Cinema Capacity**

Year	Study Area Population	Estimated cinema attendance based on the national attendance average of 1.8	Assumed retention rate of 56.7%	Trips per screen	Cinema screens supported
2026	140,707	253,273	143,606	27,578	5.2
2031	146,859	264,346	149,884	27,578	5.4
2036	152,440	274,392	155,580	27,578	5.6
2041	157,971	284,348	161,225	27,578	5.8
2045	161,137	290,047	164,456	27,578	6.0

Source: Nexus analysis

Restaurants, Pubs, Bars and Café Capacity

5.106 We have undertaken an assessment of the potential capacity for additional food and beverage floorspace across the borough, utilising current market shares as identified through the household survey, population and spending growth rates and benchmarking against current levels of provision.

5.107 This exercise identifies the future spending available to support additional food and beverage floorspace (in the form of restaurants, pubs, bars, café, etc.) over the Study period to 2045. This approach is not prescriptive but instead provides an indication of the scope for future development to be supported, in addition to the findings of the assessments of key centres.

5.108 Experian provides localised data on spending on restaurants and cafés per capita, which includes spending on alcoholic drinks (away from home) and take-away meals. In 2023, this spending was projected to be an average of £1,385 per person for residents in the Study Area (based on 2024 prices).

[19] Facts and Figures, UK Cinema Association, 2025

5.109 Taking into account population growth and anticipated leisure spending growth rates (Experian Retail Planner 23, Figure 1a), we calculate, in the figures below, the projected total spend across the Study period.

5.110 This spending is then attributed to the restaurant, café, and bar facilities within Hinckley and Bosworth. The household survey results (Q40 and Q41) showed that restaurants in the borough retained 67.62% of expenditure in the Study Area, whereas pubs and bars in the borough retained 72.71% of expenditure in the Study Area. When we look at facilities within the Borough boundary (excluding zone 3, 7 and parts of 2 and 6), this drops to 57.78% for restaurants/cafes and 59.09% for pubs/clubs. We will use these figures to look specifically at in-borough expenditure.

5.111 Growing the 'benchmark' turnover of facilities from current levels on the basis of changing leisure sales densities (as outlined in Figure 2 of the RPBN 22) through extensions and trading efficiencies over the Study period, we find a total food and beverage spending surplus across the Study Area by 2045 of £47m

5.112 Adopting an average sales density of £5,000 per sqm at 2026 (again, projected to grow in line with changing leisure sales densities), we calculate the typical restaurant, pub, bar, and café floorspace that could be supported by the identified surplus expenditure. This exercise illustrates that there will be a maximum (net) capacity of 1,900 sqm in 2031, rising to 7,700 sqm in 2045.

Figure 5.112.1 **Restaurants, Pubs, Bars and Café Capacity**

	2026	2031	2036	2041	2045
Survey Derived Turnover of all Leisure Floorspace (£m)	£112.0	£122.1	£132.6	£145.0	£153.7
Total Forecast "Benchmark" Turnover of all Floorspace (£m)	£112.0	£112.7	£113.3	£113.8	£114.3
Surplus Expenditure (£m)	£0.0	£9.4	£19.3	£31.1	£39.4
Estimated Average Sales Density of New Floorspace (£ per sqm)	£5,000	£5,025	£5,050	£5,076	£5,101
MAXIMUM "Net" Floorspace Capacity (sqm)		**1,900**	**3,800**	**6,100**	**7,700**

Source: Nexus analysis

5.113 As outlined in Section 3, the past few years have been incredibly volatile for the hospitality industry, due to the pandemic and cost-of-living crisis. Whilst our figures show that there is likely to be some pent-up consumer demand for additional spending in this area, this does not mean that all of that demand should be met through new floorspace. The potential re-occupation of vacant floorspace should be accounted for in the first instance.

Ten-Pin Bowling Capacity

5.114 There is no ten-pin bowling provision within the borough, with all identified ten-pin bowling locations at Q42 of the household survey located outside of the study area (including in Nuneaton, Coventry, and Leicester). As such there is a 0% borough retention rate for ten-pin bowling facilities.

5.115 Ten-pin bowling has generally experienced a decline over the last decade, with a gradual reduction in the number of facilities. In 2014, Mintel identified that there were 5,617 bowling lanes nationally[20], a decrease since 2011 where 5,773 bowling lanes were identified[21]. More recent data from 2021 suggests that this number has declined further to around 3,700 lanes across the UK.[22].

[20] 'Ten-pin Bowling – UK', Mintel, May 2014
[21] 'Ten-pin Bowling – UK', Mintel, November 2011
[22] Go Tenpin - Find Your Nearest Tenpin Bowling Alley in the UK

5.116 Taking into account the UK population at the time this latest data was produced (67.1 million[23]) this equates to one lane for every 18,135 persons.

Figure 5.116.1 **Bowling Lane Capacity**

Year	Study Area Population	Borough Attraction Rate (0%)	Population per Bowling Alley	Lanes Supported
2026	140,707	140,707	18,135	8
2031	146,859	146,859	18,135	8
2036	152,440	152,440	18,135	8
2041	157,971	157,971	18,135	9
2045	161,137	161,137	18,135	9

Source: Nexus analysis

5.117 The results indicate that, based on the assumed benchmark and the lack of provision within the borough, this would support NINE bowling lanes by 2045. However, we must note that only 6.36% of the survey respondents indicated that they regularly participate in ten-pin bowling. Although this may be the result of a lack of access to facilities.

Other Leisure Uses

5.118 Survey responses indicate a market share of 40.63% (which is the majority) for bingo leisure facilities in the Hinckley Town Centre. A further 18.22% of bingo market share is located in Zone 4, 5 and 6 (all in borough boundary). Only 1.51% of survey respondents indicated that they would like to see more bingo facilities in the area, indicating that the existing provision is sufficient.

5.119 Participation in cultural activities, such as theatre, concerts, museums, and galleries, within the Study Area was slightly below average at 33.04%. Of those who do participate, 26.56% go to Hinckley Town centre (including the Concordia Theatre, 17.33%) and Market Bosworth. As such, there is a significant leakage to facilities outside of the borough, including to Curve Theatre (13.14%), De Montfort Hall (10%) in Leicester and Leicester City in general (10.85%). 3.47% of survey respondents answered that they would like to see more museums and art galleries in the area, and another 9.56% answered that they would like to see more live music venues. This suggests that there is scope to increase this position, to retain more cultural leisure expenditure within the borough.

Leisure – Summary

5.120 The above findings present the quantitative and qualitative capacity for new leisure development in Hinckley and Bosworth. As we noted earlier in this Study, leisure spending is not undertaken as regularly, and residents will often visit a variety of different facilities depending on several factors.

5.121 Survey responses indicate that residents in the Study Area have a below-average participation rate in leisure activities, and that the borough has generally high market shares. Our benchmarking exercises show that in some cases, existing supply meets demand in the borough. However, there appears to be capacity for additional minor capacity for cinema screens, and scope for a ten-pin bowling facility. There is also increasing capacity for café, restaurants, pubs, and bars to 2045, and survey identified desire for cultural facilities such as museums, galleries, and music venues.

[23] As identified by the ONS Population Estimates for the UK

6. Policies and Recommendations

Introduction

6.1 This section builds on the findings of the Study, as well as considers a number of specific policy areas, and advises on the following:

- Retail and Leisure Capacity
- Town Centre and Primary Shopping Area Boundaries
- Retail Hierarchy
- Local Impact Threshold

6.2 We consider any updates to the retail hierarchy of the borough below, as well as any centre boundary amendments to take account of the passing of time since the previous Study.

Retail and Leisure Capacity

6.3 Our updated capacity assessment in Section 5 considers convenience, comparison, and leisure capacity through to the end of the Study period in 2045. We summarise below the floorspace capacities arrived at.

Figure 6.3.1 **Summary Floorspace Capacities (Maximum Figures)**

Goods	2031	2036	2041	2045
Convenience	6,900	7,600	8,400	8,800
Comparison	2,600	4,800	6,800	11,000
Restaurants, cafes, and bars	2,200	4,600	7,300	9,200

6.4 Notwithstanding the capacities identified, we are mindful of the guidance of the PPG[24] which notes that strategies can be used to establish "*the realistic role, function, and hierarchy of town centres over the plan period. Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed*".

6.5 However, it is important to set out that 'capacity' does not equate to 'need'. Need is more than just a quantitative measure; it should also involve qualitative considerations around issues such as any residents' dissatisfaction with the current level of provision, and the potential impacts of realising capacities on the ground. Fundamentally, capacity modelling should not be seen as an absolute; it is a guide to a Plan-led approach.

6.6 Our health-check findings in Section 4 of this Study showed that there is a reasonable amount of vacant floorspace across the borough's centres. In particular, we note that Hinckley Town Centre has 33 vacant units, with the majority located within the currently identified town centre shopping area. As such, the primary focus should be to accommodate floor space capacity within these units. Our comparison goods finding also suggests that whilst existing retailers will benefit from expenditure growth, it would also be reasonable to expect some closures in the comparison goods sector over the coming years, thus freeing up further existing retail floorspace.

[24] (Town Centres and Retail) Planning Practice Guidance, Paragraph: 004, Reference ID: 2b-004-20190722

6.7 However, given the additional convenience goods and food and beverage capacities identified, it may be appropriate to consider meeting the quantitative capacities identified where a qualitative need might exist. Therefore, rather than relying entirely on refilling vacant floorspace, and given projected housing growth in the borough, we would advise the authority to continue to prioritise any emerging town centre sites for retail and leisure development.

6.8 With reference to committed retail floorspace, we note that there is no committed additional provision (accounting for extant permissions). Applications approved in 2024 at North Wilshire Carpets (Hinckley TC) and Kyngs Golf and Country Club (Market Bosworth) actually resulted in a decrease of 670 sq.m of retail floorspace, and no substantive retail applications above 500 sq.m have been approved in 2025/2026. As such, there is no risk in terms of new retail applications potentially prejudicing extant permissions from coming forward.

6.9 Within Hinckley (as identified in the Hinckley Key Sites Feasibility Study and Masterplans), there are a number of key sites that have been highlighted for potential future redevelopment. There is a crossover between some of the vacant units and these sites, including the Britannia Centre, Post Office, Hansom Court, Regent Street and High Cross Building.

6.10 These key sites provide a clear direction for potential allocation of retail and leisure capacity in Hinckley Town Centre. However, timescales range between short-term and long-term, and, as in all centres, focus should be on filling vacant units in the short-term to maintain centre vibrancy in the interim.

Key Site	Retail	Leisure / Evening Economy	Other Uses
1. Britannia Centre	Consolidated retail focused on Castle Street frontage; repositioning away from large-format comparison retail.	Experiential leisure (e.g. mini-golf), cafés; potential gym	Residential (apartments, older persons/supported housing); health and community uses; workspaces; reconfigured car parking
2. Former Co-op & Castle Car Park	Retained or re-provided retail on Castle Street (potentially subdivided units)	Café/food offer possibly linked to Argents Mead.	Residential to rear and upper floors; health and community facilities; retention and enhancement of Castle Car Park; improved pedestrian links
3. Market Place & bottom of Castle Street	Limited traditional retail role; small independent units	Primary focus for cafés, restaurants, pubs, live music/evening economy	Upper-floor residential or workspace; public realm upgrades; events space
4. The Borough & Hansom Court (4a)	Secondary retail, smaller independent units	Café/leisure uses activating courtyards and streets	Creative and cultural uses, studios, workspaces; residential above ground floor; Hansom Court residential-led redevelopment
5. Regent Street & High Cross Building (5a)	Flexible small-format retail; secondary retail role; High Cross ground floor retained in retail	Potential café, bar, or leisure uses to add vibrancy	Residential conversions and infill; workspaces; community uses; possible hotel or cultural uses at High Cross
6. Church Walk	None anticipated	None anticipated	Small-scale residential infill and conversions; landscaping and boundary improvements to enhance the church setting
7. Stockwell Head & Emmaus (7a)	Limited local retail units to activate frontage	Cafés and social enterprise leisure uses (especially at Emmaus)	Residential intensification; community hub; workspaces; supported accommodation;

Key Site	Retail	Leisure / Evening Economy	Other Uses
			retention of rear Castle Street car park
8. Former Post Office, Sorting Office & Garage	Active ground-floor retail (smaller units, independents)	Food & beverage/leisure strongly supported (gateway location)	Residential or commercial uses above; reuse of historic Post Office; redevelopment of sorting office and garage

6.11 With specific reference to leisure capacity, the 2022 Leisure Site Assessment Summary identified 7 developable sites for leisure floorspace. These sites have been previously identified as being suitable and capable of accommodating leisure capacity and should be regarded as the focus. We note that we are assuming the leisure provision does not include restaurants and bars within leisure (given the floorspace estimates).

Site Reference	Site Name / Location	Leisure Floorspace (sqm)	Indicative Timeframe
AS113	Land east of Stretton Croft, Burbage (south of A5, Wolvey Road)	**20,900 sqm**	**Short term (0–5 years)**
AS173	Highcross Building, Hinckley	**1,235 sqm**	**Medium term (6–10 years)**
AS388	Land opposite Nutts Lane, off A5 Roundabout, Hinckley	**1,995 sqm**	**Medium term (6–10 years)**
AS126	Land at White House Farm, Workhouse Lane, Burbage	**7,647 sqm**	**Long term (11–15 years)**
LPR12	Old Service Station, Leicester Road, Earl Shilton	**5,225 sqm**	**Long term (11–15 years)**
LPR55	Land south of Leicester Road / Clickers Way (A47), Earl Shilton	**2,897 sqm**	**Long term (11–15 years)**
LPR155	Land at Hijaz College, north of Watling Street (A5), Hinckley	**19,760 sqm**	**Long term (11–15 years)**

6.12 Outside the town centre, Earl Shilton and Barwell's prospective sustainable urban extensions will provide a new local centre within each. This will absorb a certain capacity of retail and leisure floorspace. For Earl Shilton, an outline application for 1,000 dwellings includes 0.5ha for the envisioned local centre/community hub (E/F1/F2/C3). However, the quantum floorspace for both retail and leisure facilities in isolation is currently not known. In Barwell, an outline application for 2,500 dwellings alongside other uses, included delivery of local retail and commercial units (1,000sqm) and a public house. This application is still pending. As set out in the Healthcheck assessments (Appendix A) for Barwell and Earl Shilton, the delivery of local retail alongside the housing developments is crucial to their success, and completion of development will uplift each of the district centres accordingly.

6.13 Finally, Market Bosworth has a limited convenience retail provision, providing only a small Co-op and a greengrocer. As identified in our healthchecks, further diversification through independent convenience retailers (butcher, baker, etc.) could occupy the centre. Given the limits of unit size and parking, establishment of any bigger retailer (convenience or comparison) within the centre is not considered feasible.

Boundaries

6.14 Paragraph 90(b) of the NPPF requires local plans to 'define the extent of town centres and primary shopping areas'.

6.15 National planning policy no longer explicitly prescribes the designation of primary and secondary frontages. The Government has confirmed that the removal of this requirement reflects the general need to be flexible in planning for the future of town centres due to the rapid changes taking place in the retail and leisure industries. Whilst the removal of the requirement does not preclude local planning authorities from identifying primary and secondary shopping frontages where supported by local circumstances, we do not believe that this is merited in this instance in relation to the district centres, and, as set out in further detail below, in Hinckley.

6.16 The Study has generally identified across the centres that there is a need to repurpose and reoccupy floorspace in the manner that Use Class E generally provides for i.e. retail, food, and drink, financial or professional services, sport, and medica uses, among others. In this context, the separate designation of both primary and secondary frontages serves no useful purpose.

6.17 Annex 2 of the NPPF indicates that a primary shopping area is the: **'***Defined area where retail development is concentrated'*.

6.18 Annex 2 also identifies that a town centre is the:

'Area defined on the local authority's policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres, and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in the development plan, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.'

6.19 Annex 2 further defines the main town centres' uses as:

'Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).'

6.20 We have undertaken a review of the most recent iterations of the Town Centre and primary shopping area boundaries as provided within adopted policy documents. As is relevant to Hinckley Town Centre, the Hinckley Town Centre Area Action Plan (HTCAAP) currently identifies the following boundaries in Appendix 5:

- Town Centre Boundary
- Primary Shopping Area
- Primary Shopping Frontage
- Secondary Shopping Frontage

6.21 Paragraph 12.2 advises that:

'The Primary Shopping Area is concentrated along Castle Street, Regent Street and Station Road, together with the adjoining and intervening streets. For development control purposes, the town centre has been broadly subdivided into primary and secondary shopping frontages and other shopping areas. The primary frontage is where the floorspace is generally retail in character. The secondary shopping frontage area tends to be more mixed in character with offices, banks and similar uses interspersed.'

6.22 Policy 13 of the HTCAAP sets out the following requirement:

'Ground floor development along Primary Shopping Frontages will be restricted primarily to A1 uses to protect the vitality and retail integrity of the town centre's retail core. In the rest of the Town Centre Area, a mix of A1-5 and D2 uses will be acceptable.

Along Primary and Secondary Shopping Frontages, new development will retain, replace, or create shop frontages as appropriate. Shop frontages, including associated security features, must be designed to support the character and vitality of Hinckley town centre.'

6.23 The Hinckley Town Centre Strategic Vision (2025) has also provided a suggested potential town centre boundary, potential primary shopping area, and a 'core frontage'.

6.24 As identified above, we believe that the existing primary and secondary frontages should not be maintained going forward, given the provisions of Class E of the Use Classes Order and the Government's general objective that there should be greater flexibility on the high street. Use of a core frontage can be useful for orienting spatial plans, but do not necessarily need to serve a purpose in policy.

6.25 It is important to note that a draft of the new NPPF 2025 was released for consultation in December. At the time of writing this report, any proposed changes to the NPPF remain in draft form. There are proposals in this draft which would likely have a bearing on Hinckley's boundaries, and the outcome of this consultation and its eventual guidance should be monitored closely and enacted through future Local Plan reviews.

6.26 As set out in Policy TC1 of the draft NPPF 2025, there is still a requirement in plan-making to define a hierarchy of centres. However, whilst there is still a need to define a town centre boundary, there are no longer any references to the primary shopping area (in the plan-making policy), suggesting that delineating this area is no longer necessary.

6.27 The definition of 'edge of centre' is proposed to be streamlined to be a location that is well connected and within 300 metres of a <u>town centre boundary for all main town centre uses</u>. This would mean that the designation of a primary shopping area, whilst still an option, is no longer required for the application of the sequential test. It may, though, serve other development management functions.

6.28 In consideration of this, we have reviewed Hinckley's internal boundaries and have the following recommendations.

Figure 6.28.1 **Table of Summary of Boundary Recommendations in Hinckley Town Centre**

Boundary	Boundary Recommendations
Town Centre Boundary	Nexus have reviewed the currently defined boundary for Hinckley town centre, as well as the Hinckley Town Centre Strategy potential boundary. We largely agree with the suggested amendments to the boundary as contained in the 2025 Destination Hinckley strategy, which involves a compression of the boundary and focusing on the town centre area. Nexus agree with the removal of the following areas from the boundary: **North:** • Eden Court residences and adjacent Mansion Street, short stay • Lower Bond Street car park • Unitarian Chapel • Hollier's Walk Car Park **South:** • Rugby Road line of shops (no 34-74) • Southern Station Road, the extent of residences, and financial services • Eastern Mount Road residential buildings, to focus on the boundary of just the medical borough

Boundary	Boundary Recommendations
	East: • Intervening residences on the western side of Hill Street **West:** • Trinity Vicarage Road car park • Trinity Lane/Marchant Road development site (proposed care home) Further suggested changes include the removal of: • NWLSC Hinckley Campus (north) • Lawns Business Centre and Gladstone House (east) • Row of restaurants (including White Bear PH) and adjacent car park, western side of Trinity Lane (west) Any other proposed changes to the boundary relate to tightening in line with up-to-date OS mapping.
Primary Shopping Area	The HTCAAP Primary Shopping Area, as the adopted boundary, is considered to be too extensive and, as a result, encompasses much of the proposed town centre boundary (excluding the Argents Mead and Medical borough to the southeast) and the area around Aldi and Concordia Theatre to the north. The Hinckley Town Centre Strategic Vision proposes a potential Primary Shopping Area which is much more focused and encompasses only Castle Street, The Brittania Centre, Market Place, the western side of Station Road and The Crescent. We consider this to be an appropriate boundary for the Primary Shopping Area.
Primary Shopping Frontage and Secondary Shopping Frontage.	As set out in the Hinckley Town Centre Strategic Vision, the primary and secondary shopping frontages are proposed to be combined and reduced to what is now called a 'core frontage'. The core frontage removes the secondary shopping frontage designation to the eastern and western sides of Regent Street and the eastern side of George Street, to shift the focus from retail to a more mixed-use area, with a focus on leisure uses (i.e. the nighttime economy), which aligns with the vision) of the Strategy. This change aligns with the preeminent usage observed along both Regent Street and George Street as a clustering of leisure uses (predominantly food and beverage units). The primary focused location for retail (the core frontage), therefore, becomes Castle Street (extending west to Hill Street), Station Road (extending south to Lancaster Road), Market Place and The Borough. This creates a centralised retail area around convergence at the intersection of Market Place, The Borough, Castle Street and Station Road (also the location of the Hinckley regular market). Based on our observation of the most focused areas of activity, traditional shop fronts, and pedestrian flows, this appears to be an appropriate designation and maintains the hierarchy of these areas as the target area for retail. As set out above, there is no longer a requirement to designate a primary/secondary frontage; however, the mapping of a core frontage may continue to be used for spatial plans, rather than development management.

6.29 The following changes are proposed to the boundary for the district centres:

Figure 6.29.1 **Table of Summary of Boundary Recommendations for other Defined Centres in Hinckley**

Centre	Boundary Recommendations
Earl Shilton district centre	We recommend reducing the extent of the Earl Shilton District centre to encapsulate only a concentrated core. At present, the defined boundary includes a large section to the north of Wood Street (between Heath Lane and Mountfield Road, including the Heath Lane Surgery). This area was observed to be underutilised by visitors, despite there being a number of businesses here, including takeaway units, beauty services and the Huws Gray Earl Shilton building suppliers. Despite a small clustering of retail units, the size of the building supply site breaks up these sections of Wood Street into sections with a lack of cohesion. This is exacerbated by the southern side of Wood Street (in this western area) being predominantly residential use, with the large BS Label Ltd printing site. Compressing the centre boundary focuses the centre, which was observed to be focused around the Co-op and its parking lot, and the Methodist Church and community hub. The western boundary includes the now vacant 68 Wood Street, which has permission for residential units and a ground-floor retail unit (21/01391/FUL).
Barwell district centre	Barwell's main retail area is focused around the Chapel Street and High Street roundabout. The current boundary extends south along High Street to the Queens Head public house. Although this area of High Street is isolated by residential buildings, the Queens Head still serves a purpose as the natural entry to the centre, and this has only been enhanced by the construction of the adjacent medical centre. When looking at Chapel Street, there could be scope to include the southern part of Chapel Street (nos 14-18 and 19), which separates the George Ward Community Centre from the rest of the centre. However, as the intervening lots are residential units, which have no clear development plans, there is currently no basis for such a change. In light of the above, no changes are proposed.
Market Bosworth district centre	Market Bosworth's centre boundary is concentrated around the Market Place/Main Street intersection, but also contains three isolated units at 29-31 Station Road, and the Market Bosworth Surgery. Overall, piecemeal designation of units does not support the centre as a whole, instead drawing focus from the retail core. We recommend the boundary be altered to contain just the designated central retail core.

6.30 Maps showing the proposed boundary changes to the centres are included at Appendix E.

Retail Hierarchy

6.31 By way of background, Paragraph 90 of the NPPF explains that planning policies should:

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

6.32 The hierarchy determines how the sequential test is applied under a 'town centre first' regime. By way of example, a proposal for an out-of-centre foodstore near a Local Centre would be expected to pass the test of having first examined the availability, suitability, and viability of central or edge-of-centre sites in nearby higher order centres (i.e. a Town Centre).

6.33 Tables 5 and 6 of the Regulation 18 Local Plan (2024) summarise the current classification of Town/District/Local and Neighbourhood Centres, including the definition that warrants such a classification.

Figure 6.33.1 **Table of existing town centre hierarchy as set out in Tables 5 and 6 of the Regulation 18 Local Plan (2024)**

Classification	Centres	Definition
Town Centres	Hinckley	Area including the primary shopping area and area predominantly occupied by main town centre uses within or adjacent to the primary shopping area.
District centres	Barwell Earl Shilton Market Bosworth	Comprises a group of shops often containing at least one supermarket or superstore and a range of non-retail services such as banks, building societies and restaurants, community facilities such as libraries and other retail uses that all contribute to meeting the day-to-day needs of the community that would be served by the centre
Local Centres	Barlestone Village Centre, Burbage Boyslade Road, Burbage, Windsor Street. Groby Village Centre, Hinckley Clifton Way, Hinckley Rugby Road, Markfield Main Street, Newbold Verdon Village Centre, Ratby Village Centre.	Include a range of small shops generally serving urban communities and larger rural villages or similar. Typically, local centres might include a convenience store, newsagent, and post office, amongst other more essential retail and non-retail uses
Neighbourhood Centres	Burbage Atkins Way, Burbage Brookside, Burbage Church Street, Burbage Rainbow Way, Desford High Street, Desford St Martins Drive, Earl Shilton Belle Vue Road, Groby Laundon Way, Groby Lawnwood Road, Hinckley Coventry Road and Northfield Road, Hinckley Trent Road, Hinckley Tudor Road, Markfield Chitterman Way, Stoke Golding High Street and Station Road.	A small parade or group of small shops of purely neighbourhood significance, which are not regarded as centres within the NPPF. They are considered to be important to the local community to meet their day-to-day needs. Neighbourhood centres are particularly important in Rural Villages, which often rely on a small number of retail uses and services.

6.34 Footnote 37 to Table 6 states that classification is to be reviewed in an updated District Local and Neighbourhood Centres review.

6.35 The centres assessed across the borough have been categorised by the different levels in the hierarchy by considering a range of factors to ensure that they are proportionate to the function in which they perform. Factors considered in respect of the hierarchy include: the mix of uses provided; the social and community uses in the centres; the number of units and amount of floorspace present; along with the overall role and function that the centres play within their locality, including the location of the centres within the administrative area.

6.36 We note that the draft hierarchy above lists one town centre, three district centres, nine local centres and 14 neighbourhood centres. The SADMP DPD and the Earl Shilton and Barwell Actions Plan allocated one town centre, three district centres, 12 local centres and 15 neighbourhood centres.

6.37 The following centres were not included as part of the Regulation 18 draft hierarchy:

Figure 6.37.1 **Centres Not Included in the Regulation 18 Draft Hierarchy**

Reference	Centre Name	Classification
EAR54N	Middle and Upper High Street	Neighbourhood Centre
HIN156L	Hawley Road Local Centre	Local Centre
HIN157L	Barwell Lane Local Centre	Local Centre
HIN190L	Stoke Road and Northern Perimeter Road Local Centre	Local Centre
HIN150N	Coventry Road and Strathmore Road Neighbourhood Centre	Neighbourhood Centre

6.38 We note that there has been no justification included as to why these centres were not carried forward to the emerging local plan. In this regard, as part of the 2015 District, Local and Neighbourhood centre review, the five centres left out of the Reg 18 centre hierarchy were individually assessed alongside all other centres.

6.39 As such, it is important to consider whether the five centres should be included within the defined hierarchy for the borough. We therefore consider them in turn below, including a recommended classification based on our assessment. Overall, we recommend that all five centres should be reincluded in the centre hierarchy.

Figure 6.39.1 **Table assessing omitted centres from Regulation 18 (2024) centre hierarchy**

Name	Adopted centre classification	2015 suggested classification	Assessment	Recommended classification 2026
Middle and Upper High Street Earl Shilton	Neighbourhood Centre	No change	Located 200m from the western edge of Earl Shilton District Centre, this centre contains 13 individual units across five separate sections. The centre has a limited range of retail uses including takeaway units, a service station, assisted living facility, and small convenience unit. The offer here is limited and serves a local population; as such no change is proposed to its classification.	Neighbourhood Centre
Hawley Road	Local Centre	No change	Located next to Hinckley station, this centre contains 12 units. The centre is dominated by the Tesco and B&M but also includes a filling station, car wash, pet store and services, tobacconist, gym, public house, and health centre, as well as a significant amount of car parking. The offer of the centre is relatively diverse despite the limited number of units. The provision caters to a wider population than expected of a neighbourhood centre, and the Tesco in particular has the 5th highest main food convenience market share in the study area (8.5%). As such, we do not recommend any changes to the centre's classification as a local centre.	Local Centre
Barwell Lane Local Centre	Local Centre	No change	Located 1.6km north of the north edge of Hinckley town centre, the centre contains seven units across four sections. The offer is predominantly dominated by the large ASDA supermarket, filling station and parking but also contains the Ashby Tavern, a takeaway unit, a post office and newsagent and a comparison unit. This local centre has a diverse offer in addition to the well-utilised ASDA store, including leisure and comparison uses.	Local Centre

Name	Adopted centre classification	2015 suggested classification	Assessment	Recommended classification 2026
			The ASDA attracts the most main food convenience market share in the Study Area (13.4%) and therefore serves a significant urban population. No change is proposed to the centre's classification as a local centre.	
Stoke Road and Northern Perimeter Road Local Centre	Local Centre	Out of centre retail park	Located 1.3km northwest of the northern edge of Hinckley town centre, this centre comprises four units across two separate sections either side of the Normandy Way/Stoke Road roundabout. The offer contains the Morrisons Supermarket, filling station, and car parking (west), and Halford, Wickes and public house (east). See further specific assessment below in respect of the centre's classification.	Local Centre
Coventry Road and Strathmore Road Neighbourhood Centre	Neighbourhood Centre	No change	Located 1.3km southwest of Hinckley town centre, this centre comprises a clustering of 7 units across 5 sections. The offer includes a post office, takeaway unit, restaurant, public house, and comparison unit. The offer at Coventry Road is disparate but diverse. Overall, the expected catchment would be highly localised and typifies the offer expected of a neighbourhood centre. No changes proposed to the centre's classification.	Neighbourhood Centre

6.40 We consider that all five centres should be re-added to the centre hierarchy in recognition of their offer and trade draw in line with centre definitions set out in Table 5 of Reg 18 (2024).

Stoke Road and Northern Perimeter Road

6.41 The 2015 centre review stated that, based on the established methodology, Stoke Road/Northern Perimeter Road centre should be classed as a neighbourhood centre. However, it was ultimately concluded that the representation of, and usage of large retailers exceeded what could be expected of a small parade of shops for neighbourhood use. The 2015 centre review also considered that designation of this area as 'a centre' would cause issues by automatically classifying any development adjacent to it (e.g. north of the Perimeter Road) as 'edge of centre' rather than 'out of centre'.

6.42 We consider that an edge of centre development would still be required to undertake a retail assessment. Additionally, this should be considered in the context of Nexus' recommended lowering of the floorspace threshold for a retail impact assessment trigger (see 6.68 below). Given the limited size of the centre, additional retail within the centre is unlikely. With the imposition of a lowered threshold, most new retail development would be required to submit a retail impact assessment, regardless of the area classification as a centre.

6.43 The household survey reveals that Morrison's is a significant drawer to this area. The Morrison's store has a convenience goods market share of 11.8% (main food) and 6.4% (top-up); this is the second highest market share in Zone 1. Furthermore, the Wickes unit makes up 5.8% of the DIY market share. The popularity, draw and provision outstrip that of a neighbourhood centre provision and meet the definition for a local centre in providing both comparison and convenience uses to an urban community. As such, we consider that Stoke Road centre should continue to be recognised as a Local Centre.

6.44 In addition to the omission of the five centres above, there is also a change to Burbage Windsor Street centre. We consider this amendment below:

Burbage Windsor Street

6.45 Windsor Street (BUR62N) in Burbage was allocated as a Neighbourhood Centre in the SADMP DPD. However, the draft centre hierarchy in Table 6 of Regulation 18 local plan (2024) considers Burbage Windsor Street to be a Local Centre. As part of the 2015 centre review, no change was proposed.

6.46 Based on our assessment, Burbage Windsor Street is a sizeable centre. There are approximately 31 units within the centre providing a range of uses including several takeaway units, restaurants, public houses and bars, cafes, beauty services, fitness units, clothing and craft stores and several community uses, including the library and a nursery. There is also a SPAR convenience store, and associated car park, post office, and sandwich shop. The SPAR was noted as attracting 5.8% of Zone 2 top-up market share or 0.8% overall.

6.47 We note the scale of the centre in terms of number of units, as well as diverse offer. This can be considered in conjunction with the location and use of the SPAR within the centre. Based on these two factors, we consider that justifies classification of the Burbage Windsor Street centre as a Local Centre, rather than a Neighbourhood Centre. In comparison to Church Street Neighbourhood Centre, just 200m north of Windsor Street Centre, it is clear that the scale and offer of Windsor Street is elevated above that of other neighbourhood centres.

6.48 As such, we agree with the reclassification of Burbage Windsor Street as a Local Centre, representing an elevation from Neighbourhood Centre status.

Additional Centre Designations

6.49 Since the last the adoption of the current local plan, and since the most recent District, Local and Neighbourhood Centre Review (2015), new clusters of shops have been established, or have emerged as popular or unique retail destinations in the Borough. There are two potential new centres to add to the retail hierarchy, which we assess in detail below:

Burbage Rainbow Way

6.50 Table 6 of the Reg 18 centre hierarchy includes Burbage Rainbow Way as a Neighbourhood Centre. We consider its inclusion below, alongside another identified new potential centre at Fieldfare Road/Blackcap Close.

Figure 6.50.1 **Table assessing Burbage Rainbow Way**

Indicator	Assessment
Location	South of the Rugby Road rail bridge and adjacent to the Hawley Road Local Centre. The cluster of units is served by Rainbow Way with access from the Rugby Road/Copper Drive intersection.
Scale	8 units
Retail Offer	Co-op convenience store, Costa Coffee, Johnsons Specialist Cleaning, Toolstation, Greggs, Salvation Army Charity Shops, Vape Shop Outlet, Hansom Cab restaurant.

Indicator	Assessment
Market Share	The Co-op convenience store attracts 0.5% of the total top-up convenience market share. Toolstation attracts 0.3% of the total comparison (toy) market share, and 0.2% of the comparison (DIY or gardening goods).
Conclusion	The centre has a limited offer but a strategic location on the southern side of the railway. This means this cluster of units can easily serve the extensive housing in the location. It is expected that the Co-op is the main anchor to the centre; however, the other units are similarly well placed. There is limited market share draw; however, the cluster of units is serving a local population. Inclusion of the Hansom Cab within the centre boundary is optional; however, it is considered that visits to the restaurant would encourage trips to other units and vice versa. Unlike the other vehicle repair units, it is within the same main intersection and functionally would encourage a similarly local catchment population. Therefore, we agree that Rainbow Way should be included as a Neighbourhood Centre.
Recommended Classification	Neighbourhood Centre

Fieldfare Road/Blackcap Close

Figure 6.50.2 **Table assessing Fieldfare Road/Blackcap Close**

Indicator	Assessment
Location	Located on the edge of the Hollycroft Grange Housing development, this centre is at the corner of Normandy Way/Little Wren Way roundabout, enclosed by Blackcap Close to the west and Fieldfare Road to the north.
Scale	2 units
Retail Offer	Co-op convenience store and Greggs
Market Share	The Co-op convenience store attracts 0.4% of the main food and 1.6% of the top-up convenience market share. This is mainly associated with the store's location directly adjacent to new housing developments along Normandy Way.
Conclusion	Based on the location of the centre being embedded within a housing development, the store has a limited but highly local offering. Despites it size, the Co-op is attracting a portion of market share; however, the overall offer is limited and not expected to grow given site limitations. It is considered that the centre be designated as a Neighbourhood Centre in the new local plan.
Recommended Classification	Neighbourhood Centre

6.51 We have reviewed the size, offer and overarching nature of the borough's town and district centres, and have sought to define them accordingly based on the definitions as provided above.

Figure 6.51.1 **Table of proposed new retail hierarchy**

Classification	Centres
Town Centres	Hinckley
District centres	Barwell Earl Shilton Market Bosworth

Classification	Centres
Local Centres	Barlestone Village Centre, Burbage Boyslade Road, Burbage, Windsor Street, Rugby Road, Groby Village Centre, Hinckley Clifton Way, Markfield Main Street, Newbold Verdon Village Centre, Ratby Village Centre, **Hawley Road, Barwell Lane, Stoke Road and Northern Perimeter Road**
Neighbourhood Centres	Burbage Atkins Way, Burbage Brookside, Burbage Church Street, Desford High Street, Desford St Martins Drive, Earl Shilton Belle Vue Road, Groby Laundon Way, Groby Lawnwood Road, Hinckley Coventry Road and Northfield Road, Hinckley Trent Road, Hinckley Tudor Road, Markfield Chitterman Way, Stoke Golding High Street and Station Road**, Middle and Upper High Street Earl Shilton, Coventry Road and Strathmore Road, Burbage Rainbow Way, Fieldfare Road and Blackcap Close**

Local Impact Thresholds

6.52 In accordance with paragraph 94 of the NPPF, retail and leisure developments greater than 2,500 sqm proposed in edge-of-centre and out-of-centre locations will be subject to the assessment of the impact criteria set out in the same paragraph of the NPPF.

6.53 Planning Practice Guidance[25] explains that, where appropriate, Local Planning Authorities are entitled to identify local thresholds in accordance with the following considerations identified in the PPG:

- scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment.

6.54 The current adopted development plan for the borough does not deviate from the national threshold. Policy DM21 (Locating Sustainable and Town Centre Uses) of the Site Allocations and Development Management Policies DPD states that all applications for main town centre uses which are not in Hinckley Town Centre, which would result in the provision of 2,500 sq m or more (gross floorspace), will be required to be accompanied by an impact assessment.

6.55 Primarily, the setting of a retail impact threshold relating only to Hinckley Town Centre is not considered to be necessary. It is considered that 2,500 sq.m is a substantial size for any retail unit, which could reasonably be expected to draw trade from any of the centres.

6.56 In considering the setting of a local impact threshold, it is relevant to consider the scale of development (relating to convenience and comparison goods retail uses, and leisure uses) which would divert a material level of expenditure away from a defined centre or potentially remove a key tenant from that centre.

Scale of Proposals Relative to Town Centres

6.57 We have floorspace data provided by Experian Goad for Hinckley and Earl Shilton, and Valuation Office data for all other centres.

6.58 Applying that composition analysis to the PPG test, we can contrast below the relative scales of the main convenience retailer units in the centre, as well as the average size of all other units.

[25] (Town Centres and Retail) Planning Practice Guidance, Paragraph: 015, Reference ID: 2b-015-20190722

Figure 6.58.1 **Table of average unit size, and convenience retailer units with Hinckley and Bosworth's designated centres**

Centre	Average unit size	Average convenience unit size	Average comparison unit size
Hinckley Town Centre	226 sq.m	501 sq.m	261 sq.m
Earl Shilton District centre	135 sq.m	265 sq.m	108 sq.m
Barwell District centre	121 sq.m	126 sq.m	71 sq.m
Market Bosworth District centre	76 sq.m	139 sq.m	62 sq.m

6.59 The analysis of unit sizes in Hinckley town centre points to a prevalence of smaller retail units; the average unit size and average comparison unit size are contained between 226-261 sq.m. The convenience retailers occupy, on average, the largest units within the centre, with an average of 500 sq.m. This is predominantly owed to the size of the Aldi (1,843 sq.m) and the Sainsbury's (8,298 sq.m) units, tempered by a number of smaller convenience stores/off licences and specialised bakeries and grocers.

6.60 Hinckley's district centres present much smaller units on average, between 76 sq m and 135 sq.m. For Barwell and Market Bosworth, this reflects the retention of the heritage shopfronts built form. The three district centres are underpinned by a Co-op store which on average ranges between 245 sq.m and 1,262sq.m. As such, the underpinning store is large enough that it would constitute a 'corner shop' but could still be compromised by the introduction of a store much larger than the prevailing average of around 100-200 sq.m. Comparison unit provision in the district centres is on average smaller again, between 62-108 sq.m, and are small-scale, predominantly independent businesses.

6.61 Hinckley town centre is established as the convenience and comparison retail hub for the borough. There is, however, a threat of out-of-centre retail parks and further trade leakage to these, in particular, the growth of Fosse Park. The establishment of an out-of-centre retail or leisure unit may not impact the larger-scale retailers in the centre (Sainsbury's, Aldi, B&M). However, the presence of these retailers is likely to be a considerable draw for visitors to the centre to undertake other shopping and activities, leading to critical spin-off trade to other units. From a review of the GOAD survey for Hinckley, approximately 73% of all units in the centre are 200 sq.m or smaller, and such units are vulnerable to loss of trade.

The Existing Vitality and Viability of Town Centres

6.62 A full healthcheck for each centre has been carried out. Interventions are recommended for each of the centres to improve the overall cohesion of the centres, and to ensure future viability and vitality. Detailed healthchecks will be presented to the Council as part of the full Draft Study.

Whether Local Town Centres are Vulnerable

6.63 The district centres are considered to be relatively healthy. From our review, the three district centres have vacancy rates which range between 8.8% - 13.5%, which are below the national average of 14%. For centres of this size, this is considered to be a positive reflection on the health of the centres.

6.64 Hinckley town centre has a vacancy rate of 14%, which is on par with the national average (14.0%). The number of vacant units has increased from 56 to 84 (an increase of 28) since 2015. Vacant units are only one factor in assessing health, and it is considered that other factors (diversity of uses, pedestrian flows, and community investment) present a broadly healthy centre.

6.65 Hinckley town centre has an established role in providing a range of comparison units, including national retailers such as Boots, TK Maxx, and B&M. From our healthcheck, this comparison provision remains strong, despite splintering away somewhat from the Castle Street area (i.e. to the Crescent). The emerging strength of Hinckley town centre is its leisure provision through both food and beverage units, health clubs and other leisure facilities such as the cinema and the pool club. The central clustering of these leisure units is not considered vulnerable to leakage, as in mass they present a well-utilised hub. Potential vulnerability arises from some established and emerging out-of-centre retail competition, including Fosse Park, particularly due to its provision of major comparison retailers (Primark, Next, H&M, River Island, JD Sports, Levi's, New Look, Clarks, and Flannels), alongside a Marks and Spencer unit.

6.66 In general, Barwell and Earl Shilton district centres have been established around the location of a national multiple convenience retailer, and it is considered that any loss to these retailers would have an impact on the centre as a whole. Accordingly, we consider that a heavy reliance on existing anchor retailers provides a proper context for its district centres to be considered ‘vulnerable’ to out-of-centre trade. Market Bosworth, whilst featuring a well-used small-scale Co-op unit, the strength of Market Bosworth relies on an established tourist trade and associated small comparison retail and leisure uses (food and beverage and hotels).

Likely Effects of Development on any Town Centre Strategy and the Impact of Planned Investment

6.67 There is significant development planned as part of the sustainable urban extension (SUE) to both Barwell and Earl Shilton. For both district centres, this will bring mixed-use development to the edge of the centres, including a significant uplift in housing, employment land, public realm improvements, and a new neighbourhood centre. The SUEs in themselves, through an uplift in new residents and visitors in proximity, are also expected to uplift the district centres accordingly. Overall, the establishment of a new out-of-centre retail in proximity to either of these urban extensions could jeopardise the delivery of the neighbourhood centre element, which is crucial to the delivery of developments, and by extension, the district centres themselves.

6.68 The Hinckley Town Centre Strategic Vision, including the envisioned delivery of public realm improvements, leisure, entertainment and food, and new housing developments, is expected to provide an increased interest in the centre. Delivery of this floorspace would inject significant investment and draw to the existing businesses in the centre. This can have flow-on impacts for investor confidence and the commitment of future potential occupiers. As such, any out-of-centre development could have the ability to jeopardise any planned investment, which is intrinsically tied to the delivery of the town centre investment.

6.69 Due to the smaller scale of the district centres and the relatively modest size of most of their commercial units, we consider it appropriate for a lower impact threshold of 300 sq.m to apply to potential development proximate to these centres. This is in keeping with their more localised role and function but demonstrates the potential implications out of centre developments could have on these centres.

6.70 The district centres are generally anchored by a national multiple convenience store (typically operated by Co-op, Sainsbury’s, or Tesco). These operators underpin the function of such smaller centres, drawing in custom and encouraging linked trips to the other parts of the centre. Should the viability of such stores be impacted, there is a real risk of the role of the wider centre being undermined. There are relatively few units substantially larger than 300 sq.m in any of the district centres; as such, to lose an occupier of this magnitude could have a significant adverse impact on the centre as a whole.

6.71 For the purpose of drafting future planning policy, it is important to qualify the area to which each local impact threshold will apply. We recommend that the lower impact threshold of 300 sq.m would be applicable within 800 metres of the boundary of the relevant centre. The distance of 800 metres is broadly commensurate with the potential walk-in catchments of smaller centres and is identified by Guidelines for Providing for Journeys on Foot (The Institution of

Highways & Transportation, 2000) as being the 'preferred maximum' acceptable walking distance to a centre. We consider it to be appropriate for the higher threshold of 500 sq.m to apply authority-wide across Hinckley and Bosworth (i.e. beyond 800 metres of these centres), due to the lesser likelihood of significant adverse impacts being concentrated on one centre when the development is more distant.

6.72 It is important to emphasise that, whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the thresholds, national guidance states that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with Officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

6.73 Based on the above, we are of the view that an impact assessment will be necessary to accompany proposals for retail and leisure uses (including those relating to mezzanine floorspace and the variation of restrictive conditions) which are not located within a defined centre, where:

a. the proposal provides a gross floorspace in excess of 500 sq.m gross; or

b. the proposal is located within 800 metres of the boundary of a district centre and is in excess of 300 sq.m gross.

6.74 In our experience, it will only generally be the development of a scale greater than these thresholds that could lead to a 'significant adverse' impact, which could merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 95 of the NPPF.

6.75 In terms of the practical application of the impact policy threshold, the primary shopping area (where defined) comprises the relevant boundary in respect of retail proposals, and the wider centre boundary is the relevant boundary in respect of leisure applications. This, however, is subject to change as part of the draft NPPF 2025.

Policy Recommendations Summary

6.76 To assist the Council in finalising the draft policy position, we have set out below a summary of our policy recommendations against the relevant adopted local planning policy. In doing so, we provide commentary where we consider amendments should be made to policy to reflect the findings of this Study

Figure 6.76.1 **Policy Recommendations Summary Table**

Policy	Current Policy Wording	Nexus Recommendations
Policy DM21 (Locating Sustainable Town Centre Uses) (SAADMP DPD)	Applications for main town centre uses which are not located in Hinckley Town Centre, a District or Local Centre will need to be accompanied by a sequential site assessment. This should also address the potential for disaggregation and/or variations of format and scale. Edge of centre sites would only be considered where it can be demonstrated that there are no appropriate in-centre sites available. Out of centre sites would only be considered where: • It can be demonstrated that the site is sustainably located in terms of access to public transport, walking, and cycling. • There are no suitable in-centre sites; and • There are no suitable edge-of-centre sites. The above sequential approach will not be applied for the following developments: • Small scale rural development; • Those which demonstrably relate to the enhanced provision of tourism related activities in line with Core Strategy Policy 23: Tourism Development. All applications for main town centre uses which are not in Hinckley Town Centre which would result in the provision of 2,500 sq.m or more gross floorspace will be required to be accompanied by an impact assessment.	Nexus provides the full consideration of the local impact thresholds earlier in the section. Overall, we consider that there is scope for the threshold to be reduced, in light of the prevailing unit size in all of the centres. In addition, we recommend that the following additions be made to the policy to reflect the wording within the NPPF: 1. That reference is made in Policy DM21 to the national policy guidance provided within the NPPF in respect of the sequential test. 2. That the exception as provided by paragraph 93 of the NPPF is included in the policy. 3. That reference is made to both parts of the impact test as set out at paragraph 94 of the NPPF. With respect to the impact assessment, the current wording only applies to main town centre uses outside of Hinckley. The district centres cannot reasonably compete with Hinckley; therefore, retail should be encouraged in district centres without further qualification. As such, it is considered that the wording should be altered to include applications for main town centre uses which are not within a designated centre, and which exceed the suggested threshold, must submit a retail impact assessment.
DM22 Vitalising District, Local and Neighbourhood Centres (SAADMP DPD)	Additional retail provision within or adjacent to district, local and neighbourhood centres will be permitted where: a. It is demonstrated there are no suitable and available existing vacant premises in the applicable or nearest centre; and b. The retail frontage is retained and/or enhanced and would not result in a break in the continuous retail frontage. The boundaries of the centres are defined on the policies map. When considering applications for the change of use or loss of retail premises in borough, local and neighbourhood centres, the following conditions must be met:	With the goal of encouraging retail uses within the district, local and neighbourhood centres, we consider that the first part of DM22 is not necessary. Retail uses within centre boundaries should be permitted, and those outside of boundaries will therefore be subject to the sequential test. Therefore, there is no need to qualify this with a separate policy. It is noted that when considering change of use or loss of retail premises applications, much of the application of this policy is lost by the introduction of flexible use Class E, which amalgamated A1 to A5, B1, D1 and D2. As such, the loss of retail units becomes much harder to control via development management.

Policy	Current Policy Wording	Nexus Recommendations
	District centres. To ensure the continued vitality and viability of district centres, the change of use from A1, or A2 retail, or loss of A1 or A2 retail uses within district centres will only be permitted where the proposal would not result in an over-proliferation of any one use type in the centre, other than A1 retail, with particular reference to hot-food takeaways (A5). **Local centres:** The change of use from A1 or A2 retail or loss of A1 or A2 retail uses within local centres will only be permitted where it can be demonstrated the proposal would not detract from the vitality or viability of the Local Centre in terms of the mix and type of uses. **Neighbourhood centres:** Neighbourhood centres will be retained and enhanced wherever possible. The change of use or loss of A1 or A2 uses within these centres will only be permitted where it can be demonstrated that the loss would not reduce the community's ability to meet its day to day needs within a reasonable walking distance. In all of the above cases, proposals should accord with Policies DM10, DM17 and DM23. The use of upper floors of retail premises (A1-A5) within the district, local and neighbourhood centres, for residential use, will be supported where they accord with other policies in the Local Plan.	With reference to hot food, the change of use class to Sui Generis now allows more control to moderate a proliferation of uses but requires policy justification. Therefore, reference to the control of takeaway units should remain. The use of a more general, non-use-class-based provision could be implemented to resist the loss of retail uses, in that the Council will seek to maintain the local retail function of the borough, neighbourhood and local centres. However, control via Class E is diminished. Reference to upper storeys for residential uses should be retained.
Policy 13 Hinckley Town Centre Shopping Areas (HTCAAP)	Ground floor development along Primary Shopping Frontages will be restricted primarily to A1 uses to protect the vitality and retail integrity of the town centre's retail core. In the rest of the Town Centre Area, a mix of A1-5 and D2 uses will be acceptable. Along Primary and Secondary Shopping Frontages, new development will retain, replace, or create shop frontages as appropriate. Shop frontages, including associated security features, must be designed to support the character and vitality of Hinckley town centre.	Primarily, as set out above, we suggest that the primary and secondary frontages are amalgamated into the core frontage. This frontage is just delineated for spatial plan purposes rather than development management. However, with the introduction of Class E to encourage more flexibility within centres, this nulls the applicability of Policy 13. This policy could therefore become less specific, as the Council will seek to maintain the local retail function of the primary shopping area.
Policy 14 Retail Development Outside Hinckley Town Centre (HTCAAP)	Within identified existing shopping centres, retail development will be permitted but must be a type and size which will not have a significant adverse impact on the vitality and viability of the town centre's Primary Shopping Area.	Existing shopping centres within Hinckley are set out in the HTCAAP as 14a (Hawley Road retail park) and 14b (Rugby Road shops). Nexus agree with the ethos of this policy but considers that reference should be made to the requirement to meet the sequential test first, as both shopping centres

Policy	Current Policy Wording	Nexus Recommendations
		are out-of-centre and therefore afford no policy protection. Despite the wording of the policy, shopping centre development will not trigger a full retail impact assessment if below the threshold. Therefore, the policy should be altered to advise that retail development will be permitted where it can demonstrate there will be no significant adverse impact on the vitality and viability of Hinckley town centre (not just the primary shopping area), and inclusion is made in the text to reference the smaller centres too.

Conclusion

6.77 The PPG sets out a range of criteria that are relevant to considering whether a Local Impact Threshold should be imposed. This report has considered each in turn.

6.78 We conclude that, with many of the Borough's centres underpinned by 1 or 2 convenience retailers, any significant impact on these stores, causing closure, would have a significant adverse impact.

6.79 Based on the conducted health checks and assessment of vacant units, the centres are all considered to be relatively healthy. With the size of the units being on average between 62sqm to 500sqm, the establishment of relatively larger out-of-centre retail units could have a significant impact on Hinckley and Bosworth's centres. As such, it is appropriate for Hinckley and Bosworth Borough Council to seek a Local Impact Threshold to protect its centres. The designation of a Local Impact Threshold need not be considered as a barrier to investment, but instead as an appropriate safeguard to ensure on-going vitality and viability.

6.80 In consideration of the prevailing size of units in the centres, we recommend that a 500 sq m gross impact threshold be applied for the establishment of a new retail or leisure unit (reduced from 2,500 sq m gross in the current Plan). With regard to the district centre only, if a proposal is located within 800 metres of the boundary of a district centre, then we consider the threshold should be 300 sq.m gross. This is in acknowledgement of the much smaller average unit size in the district centres, and their reliance on one main convenience unit within the centre (a Co-op in all cases).

6.81 The thresholds should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate or trade in practice. Therefore, we continue to feel that this threshold would capture larger convenience retailers, whilst avoiding placing an undue burden on smaller stores and extensions, as well as the majority of comparison goods stores likely to trade from edge and out-of-centre locations that would have the potential to generate a cumulative draw.

6.82 We would also continue to stress that whilst a locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the recommended thresholds, national guidance dictates that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate with the scale of development proposed. The level of detail would typically be agreed with Council officers during the pre-application process to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward. Where an application proposal is above the respective stated impact threshold, we would recommend that the applicant discuss and agree on the scope of the retail impact assessment with the Council before submission.

Glossary of Terms

Bulky goods:	Goods of a large physical nature (for example, DIY, furniture, carpets) that sometimes require large areas for storage or display. *Source: Planning Portal*
Capacity:	Forecast resident spending within the catchment area, with which to support existing and additional retail floorspace. *Source: Planning Portal*
Comparison Goods:	Retail items not bought frequently, for example, televisions and white goods (fridges, dishwashers, etc.). *Source: Planning Portal*
Convenience Goods:	Everyday essential items, such as food. *Source: Planning Portal*
Edge-of-Centre:	For retail purposes, a location that is well connected to, and up to 300 metres from, the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of the edge of the centre, account should be taken of local circumstances. *Source: NPPF*
Expenditure per Capita:	The amount of money spent on retail goods per person in each Zone across the Study Area.
Expenditure:	Average annual expenditure levels for various forms of goods, multiplied by the population within the defined Study Area.
Experian Goad:	Experian Goad is a retail property intelligence system that helps retail developers, property investors, planning professionals, and commercial agents to identify profitable locations for retail property development and investment projects. It offers comprehensive retail location plans and easy-to-use reports covering over 3,000 shopping areas in the UK.
Experian AppLibrary Micromarketer:	A population, expenditure and socio-demographic dataset that utilises the 2021 Census release, projected forward by using growth rates derived from Office for National Statistics projections and current age and gender estimates.
Financial & Business Services:	An Experian Goad category comprising the likes of banks, building societies, employment agencies, legal services, estate agents, and business services. *Source: Experian Goad*
Goad Plans:	A plan showing a bird's eye view of a retail centre, including the exact location of all retail outlets and vacant premises, fascia name, retail category, and floor space. Key location factors such as pedestrian zones, road crossings, bus stops, and car parks are also featured, allowing you to instantly assess the site quality of existing or prospective store locations. *Source: Experian*
Independent Retailers:	Retailers with less than ten outlets/ stores. *Source: Experian*
Leisure Services:	An Experian Goad category for town centre leisure units which includes bars, cafes, cinemas, nightclubs, takeaways, hotels, public houses, and restaurants. For clarity, it does not include facilities for leisure pursuits, e.g. sports centres, swimming pools, or health & fitness clubs. *Source: Experian Goad*
Market Share:	The proportion of residents who visit a particular retail destination, derived from household survey results.
National Multiple:	Defined as retailers with ten or more stores/ outlets. *Source: Experian*
Primary Shopping Area:	A defined area where retail development is concentrated. *Source: NPPF*
Retail Floorspace:	Total floor area of the property that is associated with all retail uses in square metres. May be expressed as a net figure (the sales area) or in gross (including storage, preparation, and staff areas). *Source: Planning Portal*
Retail Impact:	The potential effects of proposed retail development upon existing shops.

	Source: Planning Portal
Retail Services:	An Experian Goad category comprising the likes of dry cleaners, health & beauty, opticians, photo processing, post offices, and travel agents. *Source: Experian Goad*
Sales Density:	Turnover, per square metre. Various retail planning sources, such as Verdict UK Food & Grocery Company Briefing Reports and Mintel Retail Rankings, provide average (or benchmark) sales densities for national multiple convenience retailers.
Sequential Approach:	A planning principle that seeks to identify, allocate or develop certain types or locations of land before others. For example, brownfield housing sites before greenfield sites, or town centre retail sites before out-of-centre sites. *Source: Planning Portal*
Special Forms of Trading:	Special forms of trading (SFT) are defined as sales via the internet, mail order, stalls and markets, vending machines, door-to-door, and telephone sales, including online sales by supermarkets, department stores, and catalogue companies. *Source: Experian*
Turnover:	Amount of sales per unit area of retail floorspace *Source: Planning Portal*
Town Centre:	Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres, and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres. *Source: NPPF*
Bulky goods:	Goods of a large physical nature (for example, DIY, furniture, carpets) that sometimes require large areas for storage or display. *Source: Planning Portal*
Capacity:	Forecast resident spending within the catchment area, with which to support existing and additional retail floorspace. *Source: Planning Portal*
Comparison Goods:	Retail items not bought frequently, for example, televisions and white goods (fridges, dishwashers, etc.). *Source: Planning Portal*
Convenience Goods:	Everyday essential items, such as food. *Source: Planning Portal*

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