

Harborough Retail Town Centres Study

Final Report 2025

Harborough District Council

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Executive Summary

Lichfields has been commissioned by the Harborough District Council to prepare a Town Centres and Retail Study, which will inform the preparation of the Council's new Local Plan covering the period 2020 to 2041.

The study adopts a standard and widely recognised methodology, including a household telephone survey that establishes existing shopping and leisure expenditure patterns within the District. Experian's recommended population and expenditure projections, including deductions for home-shopping, have been adopted to forecast future levels of available expenditure for comparison retail goods, convenience retail goods, food/beverage and leisure/entertainment/cultural activities.

Expenditure projections have been compared with the projected turnover of existing facilities to quantify future levels of surplus or deficit expenditure. Surplus expenditure is converted into potential new floorspace capacity projections (floorspace under-supply) based on average sales densities. In the same way, deficit expenditure projections have been converted into over-supply floorspace estimates. A qualitative assessment of need for new facilities is based on a detailed audit of town centre uses.

- 1 Primarily due to the growth of home shopping and out of centre developments, town centres have changed and diversified. Shopping behaviour will continue to change, and town centres will need to respond by providing a combined retail and leisure experience.
 - 2 Harborough has a well-established network of centres that lies within complex shopping catchment areas of larger centres in Leicester, Corby, Kettering, Northampton and Rugby, which influence shopping patterns across the District. Market Harborough is the largest centre in the District, followed by Lutterworth and then the smaller centres in Broughton Astley and Kibworth. Harborough's Local Centres vary significantly in size from 7 units (Great Glen) to over 30 units (Kibworth). The network of centres should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.
 - 3 The combined floorspace projections (cumulative) for retail and food/beverage up to 2031 is only 3,730 sq.m gross. However, longer term projections suggest capacity for a total of 7,240 sq.m gross by 2036, increasing to a total of 11,300 sq.m gross by 2041. These floorspace projections should not be adopted as rigid targets or maximum or minimum requirements but viewed as broad guidance and a starting point for the review of site-specific allocations and development management policies. There could be additional scope for about 1,500 sq.m of commercial leisure/entertainment/cultural floorspace up to 2041.
 - 4 Long term floorspace capacity forecasts beyond 10 years are susceptible to unforeseen circumstances. Growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored, including the continued growth in home/internet shopping. Long-term projections must be treated with caution and kept under review, particularly projections beyond 2036.
 - 5 The combined total projection to 2041 is 11,300 sq.m gross should be viewed in the context of the current amount of vacant shop floorspace in Harborough District (about 5,300 sq.m gross). Based on a reasonable reduction in shop vacancy rates, reoccupied space could in theory accommodate about 25% of the projected need to 2041. Commitments/proposals, as a maximum, could provide about 6,200 sq.m gross of retail and food/beverage floorspace. Vacant units and commitments/
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proposals could accommodate all the projected floorspace capacity up to 2036 (7,240 sq.m gross) or nearly 80% of the projection up to 2041 (11,300 sq.m gross).

- 6 A significant element of the floorspace capacity projections relates to population growth in the District. Large housing allocations may require the provision of new local shops and services to ensure new residents have access to day-to-day facilities within walking distance. For example, a strategic housing site of between 400 to 500 homes could support a new local or neighbourhood centre of up to 500 sq.m gross. If new local shops and services are provided in strategic housing developments, then any residual floorspace capacity up to 2041 could be accommodated.
 - 7 Residents across the main settlements have reasonable access to a range and choice of food stores and there are no obvious areas of deficiency in food store provision. Large food stores in the District are concentrated in Market Harborough, Lutterworth and Broughton Astley, which are suitable for main and bulk food shopping. Residents in the north and west of the District also have good access to large food stores in Leicester and Rugby. The discount food store sector is well represented in the District with Aldi and Lidl stores. These large stores are complemented by a selection of smaller stores suitable for top-up food and grocery shopping including Co-op and Tesco Express stores. The three local centres in Fleckney, Great Glen and Kibworth Beauchamp each have a Co-op store suitable for top-up food shopping.
 - 8 Harborough's residents have a reasonable range and choice of comparison goods shopping destinations and food/beverage facilities, due to the proximity of Leicester and Rugby. Most categories of comparison goods shops are available in Market Harborough and to a lesser extent Lutterworth. The range and choice of comparison goods shops in the local centres is very limited. Market Harborough has a reasonable provision of retail warehouses.
 - 9 There is projected floorspace capacity to accommodate an additional 1,500 sq.m gross of commercial leisure and cultural floorspace, which could include: a small boutique cinema (one or two screens), one or two medium sized health and fitness facilities (about 70 to 140 new fitness stations in total); a small tenpin bowling facility within a multi-use leisure facility; a bingo hall (subject to operator demand and trends in on-line gambling); new leisure innovations and small scale tourist attractions/cultural facilities.
 - 10 The Town Centres and Retail Study has identified policy and strategy recommendations including:
 - a The relatively low floorspace projections can be accommodated in vacant town centre units and residual growth could be absorbed by commitments/proposals. The capacity projections suggest there is no pressing requirement to allocate new sites for major retail/leisure development. The priority in the short to medium term will be the reoccupation of vacant shop units. Any longer-term residual need between 2036 to 2041 could be accommodated a combination of existing Policy RT1 and RT4 mixed-use development allocations in Market Harborough and/or local shops and services within strategic housing developments of over 400 new homes.
 - b The future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.
 - c Identifying the hierarchy of centres and the boundaries of centres in the Local Plan is important in terms of ensuring the vitality and viability of town, district and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
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directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and identifying a viable role and strategy for each centre.

- d The current designation of centres and hierarchy are sound. Market Harborough and Lutterworth should continued to be designated as town centres at the top of the hierarchy of centres in the District. Both town centres should continue to provide the focus for retail and leisure development in the District, serving communities within the wider District area.
 - e The Council could consider upgrading Kibworth to district centre status, alongside Broughton Astley. Kibworth has a similar number of retail and service uses and a similar mix of activities undertaken when compared with Broughton Astley. Both centres play an important role as a focal point for their settlement.
 - f Great Glen and Fleckney should continue to be designated as Local Centres, serving their respective settlements and the predominantly rural areas in the central and northern parts of the District. These centres should be protected as they provide important local access to lower order retail and services for their communities within walking distance.
 - g Local Plan policy should continue to set out the sequential and impact tests. The impact test should only applies to retail and leisure uses, rather than all main town centre use, in line with the NPPF. The level of detail required in the impact assessment will vary case-by-case and it is for the applicant to provide robust justification that their impact assessment is robust, appropriate and proportionate.
 - h The NPPF minimum threshold of 2,500 sq.m gross continues to be an inappropriate threshold for Harborough District. The relatively low floorspace capacity projections and pipeline commitments/ proposals, the relatively high shop vacancy rate in Broughton Astley and uncertainties about the post-cost of living crisis recovery suggest Harborough's centres are now more vulnerable to out-of-centre developments. Market Harborough's current threshold of 1,500 sq. m. is relatively high considering the low floorspace projections. The Council should consider introducing a consistent amended impact threshold in line with the Sunday trading limit (up to 500 sq.m gross or 280 sq.m net sales) to protect the vitality and viability of centres across the District. This threshold better reflects the much lower floorspace projections and the small scale of some centres and their fragile vitality and viability. Fleckney's Neighbourhood Plan proposes a lower impact threshold of 100 sq.m. gross for impact assessments, due to the smaller scale of its retail units.
 - i Current Local Plan policies do not actively support new facilities in poorly served areas. Small scale shops and services outside designated centres could be supported, where a particular market and locational requirement has been robustly justified.
 - j The new Local Plan should continue to define clear boundaries for town and local centres on the Proposals Map and these should remain the focus for retail, leisure and other main town centre uses. The continued need for both town centre boundaries and primary shopping areas (PSA) in Market Harborough remains sound. However, a separate PSA, in addition to the centre boundary, is not necessary in other centres.
 - k The relatively low retail floorspace capacity projections suggest there is no need to extend centre or PSA boundaries to accommodate future growth, but the longer term projected under-supply of floorspace implies the contraction of most centre boundaries is also unnecessary. Some minor amendments to Local Centre boundaries could be considered.
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- l The designated Market Harborough PSA should be retained. In this area retail and other Class E uses should be maintained and enhanced. Development should maintain an active frontage. Within other parts of the town centres a wider range of main town centre uses including Class E, Sui Generis and Class F could be promoted and protected.
 - m Proposals that require planning permission that would result in the loss of these uses at ground floor level in the PSA or wider town centre should only be permitted subject to criteria relating to:
 - individual or cumulative impact on neighbouring amenity;
 - adverse impact on the vitality and viability of the centre as a whole;
 - provision of an active frontage at ground floor level which relates well to the design of the building and to the street-scene and its setting; and
 - adequate marketing of the unit for Class E uses in the PSA or Class E, Sui Generis and Class F uses in other parts of the centre.
 - n The introduction of Article 4 directions to prevent permitted changes of use that could undermine the character or vitality and viability of parts of town centres is not considered necessary at present in Harborough District.
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Glossary

Average sales density/turnover density

The annual average level of trade or turnover achieved per square metre of sales floorspace, which is used to measure the relative trading performance of retail outlets.

Benchmark turnover

Expected turnover of existing retail floorspace based on national averages which the identified available expenditure can be measured against.

Class A1

Commercial units/premises previously classed as retail or shop uses, but now part of the new Class E.

Class A2

Commercial units/premises previously classed as financial or professional services, e.g. banks and building societies, but now part of the new Class E.

Class A3

Commercial units/premises previously classed as restaurants and cafés, but now part of the new Class E.

Class A4

Commercial units/premises previously classed as public houses and bars, but now classed as Sui Generis.

Class A5

Commercial units/premises previously classed as hot food takeaway outlets but now classed as Sui Generis.

Class D2

Commercial units/premises previously classed as leisure, sport and recreation uses but now classed as Class E, Class F.1 or Sui Generis.

Convenience goods

Consumer goods purchased on a regular basis e.g. food/groceries and cleaning materials.

Comparison goods

Durable goods such as clothing, household goods, furniture, DIY and electrical goods.

Experian

A data consultancy widely used for retail and leisure planning information.

Food and beverage

Classes A3 food and drink outlets, selling food and drinks consumed away from the home or hot food takeaway food but not food and grocery items including convenience goods.

GlobalData

A market research and data consultancy widely used for retail planning information, previously Verdict Research.

Goad Plans

Town centre plans prepared by Experian, which are based on occupier surveys of over 1,300 town centres across the UK.

Gross floorspace

Total external floorspace including exterior walls.

Market share/Penetration rate

The proportion of total consumer expenditure within a given area taken by a particular town centre, destination or shopping/leisure facility.

Multi-channel shopping

Products made available to consumers on more than one sales channel, such as ecommerce websites, brick-and-mortar stores, marketplaces, comparison shopping engines, social media platforms, and other online channels.

Multiplex cinema

A cinema complex with five or more screens.

Net (sales) floorspace

Retail floorspace devoted to the sale of goods, excluding backstage/storage space and other areas not accessible to customers.

Oxford Retail Consultants (ORC)

A data consultancy widely used for retail planning information.

Special forms of trading (SFT)

Retail sales via the internet, mail order, stalls and markets, door-to-door and telephone sales, including on-line sales by supermarkets, department stores and catalogue companies.

1.0 Introduction

Overview

- 1.1 Lichfields has been commissioned by the Harborough District Council (“HDC” or “the Council”) to prepare a Town Centres and Retail Study. Lichfields previously prepared similar studies for the Council in 2013 and partially updated the study in 2017. The 2013 study and the 2017 update informed the current Local Plan adopted in April 2019.
- 1.2 The updated analysis in this report will inform the preparation of the Council’s new Local Plan covering the period 2020 to 2041. The study has been prepared to meet the requirements set out in the National Planning Policy Framework (NPPF), the Planning Practice Guidance (NPG). The key requirements of the commission are set out below.
- 1 Provide a health-check of the performance and vitality of Market Harborough and Lutterworth town centres and Broughton Astley district centre and the local centres at Kibworth, Fleckney and Great Glen.
 - 2 Based on new empirical evidence the study updates and replaces the findings of the Council’s existing retail and town centres evidence base study.
 - 3 Assess the quantitative need for new retail floorspace in the District over the period to 2041, together with an assessment of spending growth and the need for leisure and other main town centre uses.
 - 4 Consider the changes arising from the Covid-19 pandemic and the introduction of Use Class E.
 - 5 Provide a review of high-level trends in retail, leisure and main town centres uses and evaluate their implications for centres.
 - 6 Undertake a survey of residents/users to establish the profile of users, pattern of visits and expenditure for retail, leisure and main town centre uses to define the catchment area of each centre and their market share.
 - 7 Provide an assessment of the impact of the changes to permitted development rights in relation to retail properties, and the potential for future change, on the nature and vitality of retail areas within Market Harborough and Lutterworth.
 - 8 Review the Harborough retail hierarchy and existing town centre boundaries and define and propose any changes that are required, including the need for a Primary Shopping Area in Market Harborough.
 - 9 A review of the local thresholds for undertaking Retail Impact Assessments set out in the adopted local plan and propose any changes required.
 - 10 Assess the capacity of the town centres to accommodate the need for new floorspace, including a review of existing allocations and other potential development sites.
 - 11 Advice on the role, scale and mix of retail provision required at Strategic Development Areas (SDA) to ensure that the provision meets the needs of residents without impacting the vitality and viability of town and district centres.

- 1.3 A household telephone survey was undertaken by NEMS Market Research (700 completed interviews) to provide robust empirical evidence to meet the study requirements set out above. The methodology and results are set out in Appendix 6.

Report structure

- 1.4 Section 2 of this report provides a summary of current national planning policies and changes to the Use Classes Order introduced in September 2020.
- 1.5 Section 3 provides an overview of trends and recent changes that will affect the demand for retail and other relevant town centre uses. The appropriate policy and strategy approach for Harborough District should reflect these underlying trends.
- 1.6 Section 4 examines the existing hierarchy of centres within the District and the surrounding area. Appendix 2 provides more detailed centre health checks and audits for the six key designated town, district and local centres in the District, as follows:
- Market Harborough town centre;
 - Lutterworth town centre;
 - Broughton Astley district centre;
 - Fleckney local centre;
 - Great Glen local centre; and
 - Kibworth local centre.
- 1.7 Section 5 sets out the retail and food/beverage floorspace capacity assessment based on the latest available Experian expenditure and sales density projections. The capacity tables are shown in Appendix 3, 4 and 5.
- 1.8 Section 6 provides an assessment of other main town centre uses including the scope for leisure, entertainment and cultural uses.
- 1.9 Section 7 reviews potential implications for future development plan policy taking account of updated floorspace capacity projections and recent changes to the Use Classes Order (UCO) and permitted development rights (PDR).
- 1.10 Section 8 summarises the main conclusions and recommendations.

2.0 National Planning Policy

National Planning Policy Framework

- 2.1 The latest version (December 2023) of the National Planning Policy Framework (NPPF) remains unchanged in relation to the vitality of town centres. Paragraph 90 indicates 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, allows a suitable mix of uses (including housing) and reflects 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, re-introduce 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.
- 2.2 The rapid changes that are affecting the retail sector and town centres continue to be acknowledged and reflected in the latest NPPF. It recognises that diversification is key to the long-term vitality and viability of town centres, to 'respond to rapid changes in the retail and leisure industries'. Accordingly, planning policies should clarify 'the range of uses permitted in such locations, as part of a positive strategy for the future of each centre'.
- 2.3 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. Covid-19 and the cost-of-living crisis has elevated this debate. On-line shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a broader mix of uses within town centre will become increasingly important i.e. leisure and services as well as retail. It is widely recognised that a broader mix of uses can extend activity throughout the daytime and into the evenings.

Changes to the Use Classes Order

- 2.4 In September 2020, the UCO was significantly amended. Changes to town centre use classes now allow far greater flexibility for uses to change within town centres without the need to obtain planning permission. The UCO has significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses and retain specific uses previously protected e.g. Class A1 retail.
- 2.5 In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:
- Class E (Commercial, business and service);
 - Class F.1 (Learning and non-residential institutions); and
 - Class F.2 (Local community).
- 2.6 The UCO changes now combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as 'main town centre uses' within the NPPF e.g. medical services and some light industrial uses.
- 2.7 Other changes potentially introduce more restrictions rather than flexibility. Partly in response to the impact of the Covid-19 crisis, there is added protection against the loss of learning, non-residential and community facilities, including museums, public halls, sports facilities and local shops. These uses are now included in new Classes F.1 and F.2. Class F.2 also includes small, isolated shops (at least 1 kilometre from a similar shop) selling essential goods including food.
- 2.8 Other potential non-retail town centre uses have been placed in the list of Sui Generis uses, with no permitted changes of use e.g. pubs/bars (A4), takeaways (A5), cinemas and live music venues. The inclusion of these uses as Sui Generis appears to have a dual function i.e. controlling uses such as pub/bars and takeaways that may have an impact on nearby residential amenity, whilst protecting against the loss of other cultural facilities such as cinemas and music venues, most vulnerable to the impacts of Covid-19.
- 2.9 The previous distinction between Class A3, A4 and A5 uses has become more critical, with Class A3 uses now having more flexibility in the new Class E, but no flexibility for Class A4 and A5 uses. Many Class A3 restaurants offered a takeaway service during the Covid-19 crisis and the categorisation of bar/restaurants has always been arguable and will be a matter of fact and degree on a case-by-case basis. In response to these changes, future land use surveys should categorise uses within centres and frontages to reflect the new UCO, which is helpful when considering appropriate policy options and change of use planning applications.
- 2.10 The potential implications of permitted changes in use outside town centres may also have unintended consequences. In theory large out-of-centre B1 office buildings or D2 commercial leisure uses, with no restrictive conditions, could be converted to retail use without planning permission or an assessment of the impact on the town centre or application of the sequential test. Allowing retail uses to occupy out-of-centre buildings could run counter to the objective of maintaining and enhancing town centres. This change

could have implications for the effectiveness of retail impact and sequential test policies. However anecdotally, there has been no upturn in out-of-centre retail uses occupying employment or leisure buildings either nationally or locally.

- 2.11 In December 2020, the Government began a consultation on a variety of further changes to permitted development rights relating to housing delivery and public service infrastructure. The consultation included a proposed Class E to Class C3 permitted development right. The outcome of several elements of this were published and the associated amendments to the Town and Country Planning (General Permitted Development) (England) Order 2015 (GPDO) which were laid before Parliament in the Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021. The Government published an amendment to the General Permitted Development Order in March 2024.
- 2.12 A new Class MA business and commercial to residential permitted development right has introduced certain commercial to residential permitted development (PD) rights. The new class MA is different to previous retail and office to residential PD rights, with several different limitations and conditions. Delivering housing and the reuse of redundant shopping space is the Government's priority and the Class MA permitted development right emphasises this.
- 2.13 The new permitted development rights effectively reduce the scope of office to residential permitted development while increasing the scope of retail to residential and introduce new PD rights for other town centre uses to change to residential. The impact of these PD rights on the number of occupied retail premises in town centres is unclear at this stage, but generally the proportion of retail units have been falling over the past decade.
- 2.14 Class MA allows many properties within Class E to change to residential without consideration of impact on the high street where the proposal is outside of a conservation area and limited consideration if it is within a conservation area. The impact on the character and sustainability of the conservation area needs to be considered for ground floor proposals. There may also be restrictive planning conditions or legal agreements that prevent change of use via Class MA.
- 2.15 Only listed buildings and their curtilage and properties in the most sensitive locations such as World Heritage Sites and Areas of Outstanding National Beauty are excluded from the new PD right. This legislation does not apply to Harborough District, but in relevant areas requires assessment of loss of retail and office in beautiful and heritage locations, but in no other retail or business destinations. The retail assessment required by the previous Class MA PD right falls away.
- 2.16 Subject to limitations and conditions, former uses classes Class A1 (shops); Class A2 (financial and professional services); Class A3 (food and drink); Class B1 (business); Class D1(a) (non-residential institutions – medical or health services); Class D1(b) (non-residential institutions – crèche, day nursery or day centre) and Class D2(e) (assembly and leisure – indoor and outdoor sports), other than use as an indoor swimming pool or skating rink, now benefit from the Class MA PD rights. The changes introduced in March 2024 for Class MA remove the requirement that a building must have been vacant for a continuous period of at least 3 months immediately prior to the date of an application for prior approval. Additionally, Class MA is amended to remove the floorspace upper limit for buildings changing use under the right.

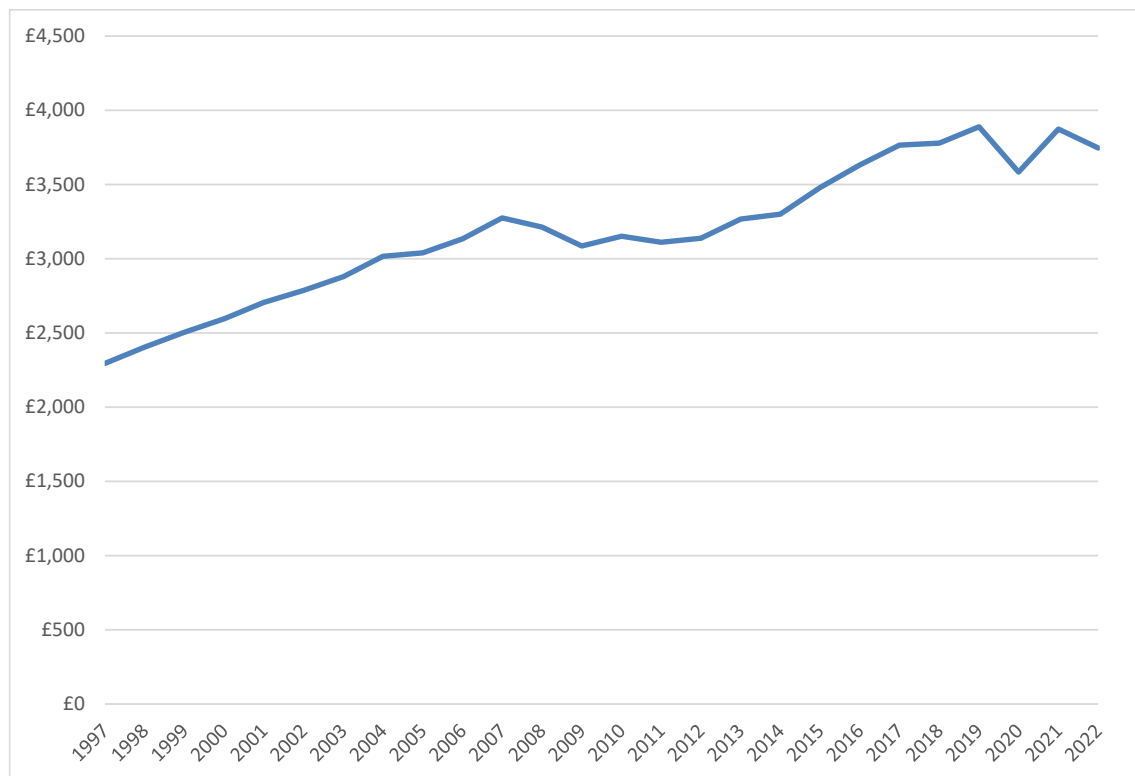
- 2.17 In a conservation area and where the change of use is at ground floor level, the impact on the character and sustainability of the conservation area is another new prior approval matter. Addressing this matter could potentially include a limited assessment of retail impact.
- 2.18 The requirement to meet space standards in relevant prior approval applications came into force in April 2021. The GPDO does not grant permission for any dwelling that would be less than 37 sq.m or would not comply with the nationally described space standard. These measures have raised concerns about the potential impact on high streets and shopping parades, which are essential to support local communities.
- 2.19 Many Local Authorities have introduced Article 4 Directions as a mechanism to protect town centres, by removing some of the PD rights. These Article 4 Directions are usually focused on a specific area rather than across the entire town centre.

3.0 Recent trends and key changes

Implications of Brexit, Covid-19 and other national trends

3.1 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. The growth in expenditure per person on comparison retail goods between 1997 and 2022 is shown in Figure 3.1. Experian is a data provider most often used in evidence base studies that provides consumer expenditure data and other economic forecasts. High expenditure growth between 1997 and 2008 fuelled demand for new retail floorspace. However, since the last recession in 2009 comparison goods expenditure growth has been much slower and occupier demand for retail floorspace has reduced significantly, demonstrated by the general reduction in the number of comparison goods shops in town centres (see later in this Section).

Figure 3.1 Comparison goods expenditure average per head in the UK (constant 2019 prices)



Source: Experian Retail Planner Briefing Note 21 (February 2024)

3.2 Experian's latest forecasts suggest slower expenditure growth for both comparison and convenience goods and home shopping/internet spending is expected to continue to grow at a much faster rate than traditional shopping. Experian's short-term expenditure growth projections (up to 2025) for retail and leisure now reflect the expected longer-term effects of Brexit and the Covid-19 pandemic. The current cost of living crisis will also suppress expenditure growth in the short term.

- 3.3 The main implications of Brexit, Covid-19 and the cost-of-living crisis for the evidence base are likely to be as follows:
- impact on the reliability of demographic and economic projections i.e. population growth and Experian expenditure forecasts;
 - short term impacts on the mix of town centre uses and customer behaviour that are likely to distort the base year position; and
 - longer term structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.
- 3.4 The key uncertainties relating to the first two points are primarily the post Covid-19 recovery and the length of the cost-of-living crisis. The longer-term structural implications are harder to predict and quantify at this stage, however there are already signs of a bounce back in terms of expenditure growth, but the cost-of-living crisis may suppress this recovery.
- 3.5 In the short-term, operators have faced elevated risks to cashflow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services were the hardest hit. Short-term supply chain disruption led to inflationary pressures, which will have an impact on consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery benefitted in the short-term. There is likely to be a long-term structural shift to multi-channel shopping, reducing the demand for physical space within town centres.
- 3.6 Bearing these trends in mind there has been a spike in town centre vacancies with some businesses failing to re-open following the Covid lockdowns, particularly non-food retail operators, restaurants and leisure uses. High levels of inflation and the cost-of-living crisis are likely to exacerbate difficult trading conditions. Many national operators have already announced job losses and store closures.
- 3.7 Brexit and Covid-19 have had short-term impacts in terms of population migration levels and a pause in construction activity. Given that the focus of this study is to assess the long-term need over the new local plan period within five-year interval projections, development plan policy should assume population projections will return to projected levels before 2031. The population projections in 2031, and certainly 2036, should not be significantly affected by the Covid-19 and cost of living crisis. It is not yet possible to understand if the short-term impact will continue into the medium and longer-term projections to alter previous trends to any greater extent. This study has adopted Experian's latest 2022 population estimates, which reflect these trends.

The Impact of Covid-19 lockdowns

- 3.8 Office of National Statistics (ONS) monthly sales volume information for Great Britain indicated total retail sales volumes during the first Covid-19 lockdown were over 22% lower in April 2020 compared with the pre-Covid position in February 2020 (seasonally adjusted). However, in the period between lockdowns (July and August 2020) sales volumes had recovered to pre-Covid levels. By October 2020 retail sales were 7% higher than the pre-Covid figure in February 2020. However, the reintroduction of Covid-19 restrictions saw a reduction in sales in between November 2020 to January 2021, reaching

5% below pre-Covid levels. Sales had recovered to 9% above pre-Covid levels by April 2021. At the end of the Covid-19 crisis, the seasonally adjusted figures for November 2021 were 6% above pre-Covid levels.

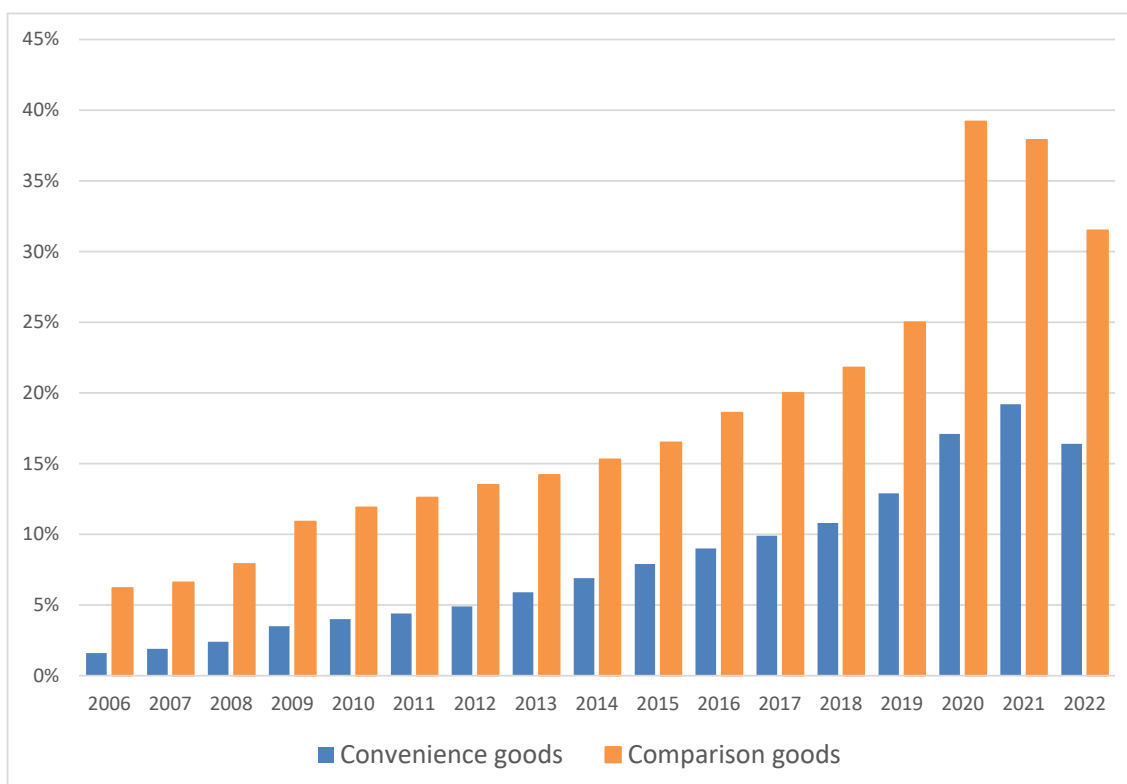
- 3.9 The comparison goods (non-food) sector was particularly affected with a 50% drop in sales from February to April 2020, whilst the food sector experienced a 10% growth in sales during March 2020 in part due to panic buying at the start of the crisis. Food sales volumes were consistently higher than the February 2020 low point during March to November 2020.
- 3.10 ONS data suggested on-line retail sales (seasonally adjusted) peaked at over 73% higher in May 2020 compared with February 2020. Figures for June 2020 to May 2021 were consistently higher than the pre-Covid sales in February 2020, with a second peak of nearly 81% higher than pre-Covid levels in February 2021.
- 3.11 During the first Covid lockdowns food store on-line sales doubled during May and June 2020 but still represented a relatively small proportion of total sales in this sector, reaching about 11.9% in January 2021, but reducing slightly to 9.7% in November 2021. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April 2020, reaching 45% of sales. At the end of the Covid-19 crisis by November 2021, on-line sales in this sector were still 23.2% of total sales, compared with the pre-Covid level of 16.1% in February 2020.

Experian's latest retail expenditure information

- 3.12 Experian's Retail Planner Briefing Note 21 (February 2024) suggests non-store retailing's market share increased from 20.4% in 2019 to 30.5% in 2021. The next Experian Briefing Note is not expected to be published until February 2025. Non-store sales include all on-line sales and other forms of sales not generated from physical retail floorspace e.g. vending machines, party plan and deliveries. Comparison non-store sales increased from 25% to 37.9% and convenience good sales increased from 12.9% to 19.2%. However, Experian indicates comparison goods non-store sales figure fell during 2022 down to 31.5%. Convenience goods non-store sales also fell to 16.4%. Nevertheless, the 2022 figures remain significantly higher than the pre-Covid market shares in 2019. The growth in non-store retail sales for comparison and convenience goods between 2006 and 2022 in the UK is shown in Figure 3.2.
- 3.13 Between 2006 and 2022 the proportion of comparison goods non-store sales increased by 25.3 percentage points from 6.2% to 31.5%, and the proportion increased by over five times. The proportion of convenience goods non-store sales increased by 14.8 percentage points but increased by over ten times, starting from a lower 2006 base of only 1.6%. The 2013 and 2024 household survey results in Harborough indicate this national trend has been mirrored locally.
- 3.14 Experian data shows a sharp increase in non-store sales during the Covid lockdowns during 2020 and 2021, but a decline in 2022. Experian's forecasts suggest a continued reduction during 2023 but steady growth thereafter. Experian's 2023 figures remain significantly higher than the pre-Covid market shares in 2019 i.e. 31.5% compared with 25% for comparison goods and 16.4% compared within 12.9% for convenience goods.

3.15 ONS's post lockdown data suggests retail sales have recovered to previous levels of growth, but the proportion of retail sales spent on-line is a higher proportion of total sales, which will have an impact on traditional bricks and mortar retailing. Conversely the introduction of return fees for on-line shopping and increased minimum spend thresholds for free deliveries may benefit traditional retailing.

Figure 3.2 Non-store sales as a percentage of total sales in the UK



Source: Experian Retail Planner Briefing Note 21 (February 2024) – Appendix 3

3.16 Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth in on-line shopping when compared with trends in recent years. These longer-term forecasts should be monitored and kept under review.

National expenditure trends

3.17 This study adopts Experian latest expenditure information and forecasts (Retail Planning Briefing Note 21 – February 2024). The study sets out expenditure projections during five-year intervals up to 2041.

3.18 The current cost of living crisis, including the high level of inflation, resulted in a reduction in retail expenditure per person during 2022, with many customers either trading down (buying cheaper products or using discount retailers) or cutting back (buying less products). Experian indicates a continued decline during 2023 and 2024. Low growth is predicted during 2025 and 2026, but higher annual growth is expected in the longer term between 2027 to 2041.

3.19 Planning based on long-term expenditure growth projections up to and beyond ten years has always had inherent uncertainties. Despite these uncertainties, development plans

should assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, should be adopted, bearing in mind the uncertainties relating to the growth in on-line shopping.

- 3.20 For convenience goods, Experian's latest forecasts suggest a continued period of readjustment following high growth in expenditure experienced during the Covid-19 lockdowns in 2020 and 2021. No expenditure growth is envisaged between 2026 to 2030. In the longer-term limited growth is forecast at 0.1% per annum thereafter. Experian suggests convenience goods sales will settle after 2025, following the post-Covid readjustment. Experian expects most growth in the future will relate to non-store sales. Any need for new convenience goods retail floorspace in the District is likely to relate to population growth, high current levels of trading or qualitative areas of deficiency.
- 3.21 Comparison goods expenditure per head is predicted to fall by 1.2% during 2024 and increase by 2.7% during 2025. Modest growth is expected in the longer term (between 2.8% to 3.1% per annum), but still at a lower rate than previous historic trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.
- 3.22 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued steady growth in multi-channel activity.
- 3.23 The floorspace capacity assessment in this study makes an allowance for future growth in e-tailing based on Experian's latest projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

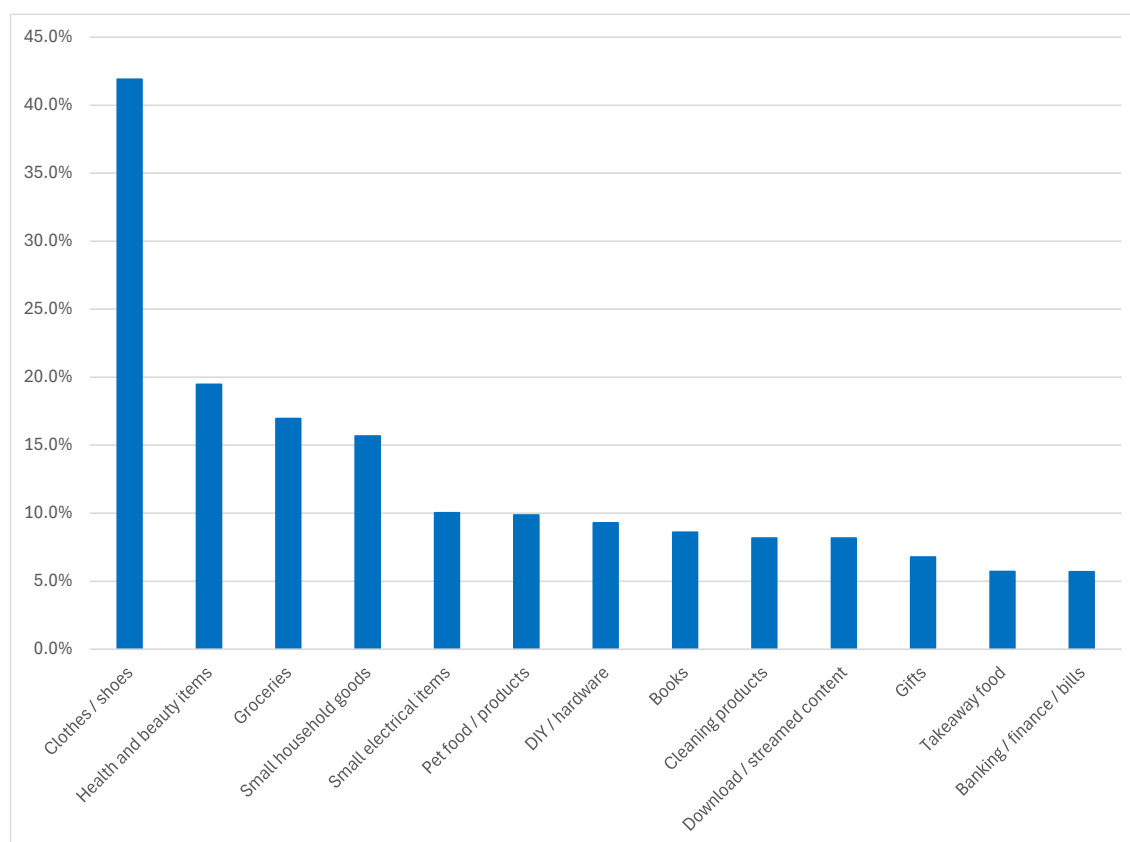
Shopping behaviour in Harborough District

- 3.24 The household survey results for 700 completed interviews during April 2024 across the Harborough study area as shown in Appendix 1, indicate many households regularly buy items from the internet for home delivery. The survey methodology and results are set out in Appendix 6.
- 3.25 In line with national trends highlighted above, the survey results suggest 27.6% of respondents do most of their household's non-food shopping on-line and 12.7% of households did their last main food and grocery shop via the internet/delivery. In 2013 the household survey results suggested less than 7% of households did most of their non-food shopping via the internet/delivery and only 5% did their last main food and grocery shop

via the internet/delivery. These survey results suggest internet/delivery shopping has increased significantly in Harborough in the last decade, consistent with national trends. Home shopping is expected to continue to grow in the future but at a slower rate. This continued trend will reduce the level of expenditure growth available to support additional retail floorspace in the District.

3.26 The products most regularly purchased by households in Harborough online are shown in Figure 3.3. These survey results indicate that a broad range of non-food goods are purchased online, but clothing /footwear and health and beauty items are most often purchased online.

Figure 3.3 Items most (top three) regularly purchased via the internet (% of all households)



Source: Harborough NEMS household shopper survey April 2024 (weighted results)

3.27 In 2013, the most popular non-food goods purchased online were books (38%), followed by CDs/DVDs (31%), and then clothes/shoes (21%) and electrical goods (13%). Groceries were only 6.1%. These previous and current survey results indicate the amount and range of goods purchased online has increased over the last decade and has increased competition with key sectors traditionally found on the high street.

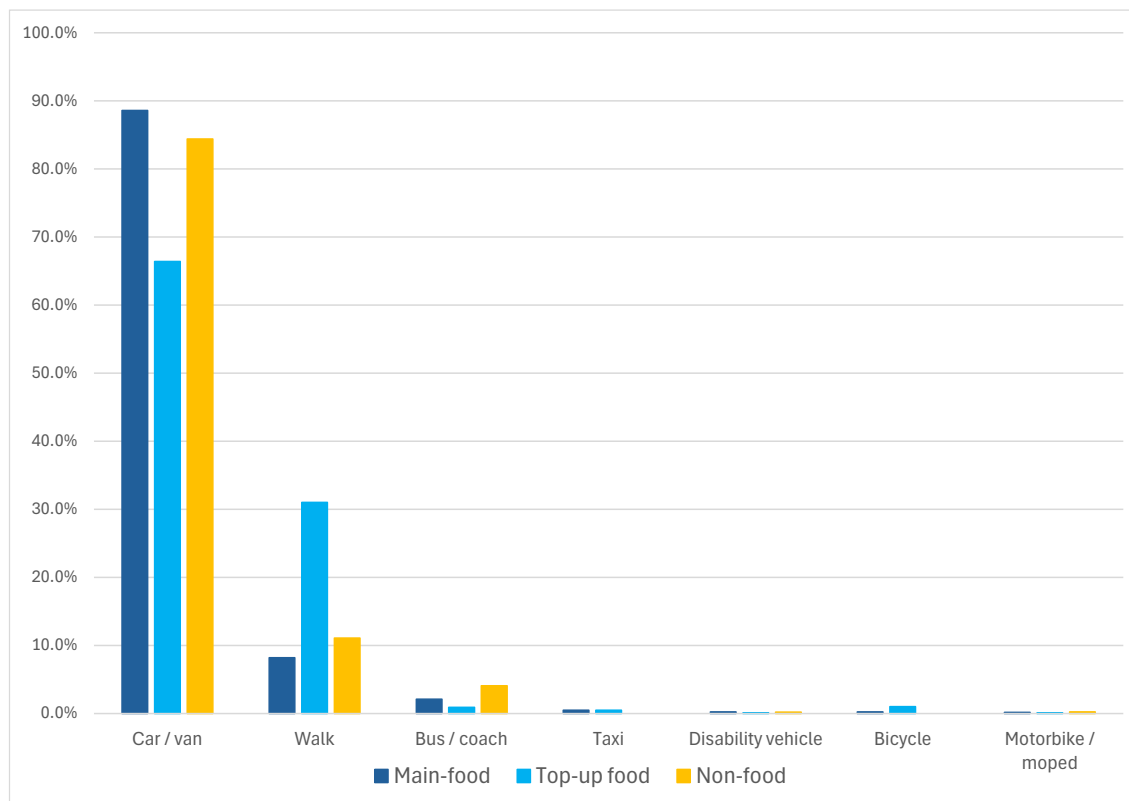
Mode of travel and frequency of trips

3.28 As indicated above, 27.6% of respondents reported doing most of their non-food shopping online and 12.7% of respondents did their last main food shop online, with Tesco being the online supermarket of choice for over one third of respondents. Experian suggests 24.7% of

retail sales was via non-store activity in 2023. The figures suggest many households do not need to travel to undertake food and non-food shopping.

3.29 Despite the increasing proportion of households shopping via the internet, the majority continue to travel to shopping destinations by car. The results for main and top-up food/grocery shopping trips and non-food shopping (excluding internet/home shopping) are shown in Figure 3.4.

Figure 3.4 Mode of travel for non-food and food shopping (% of travelling household respondents)



Source: Harborough NEMS household shopper survey April 2024 (weighted results).

3.30 Shopping by car as the driver is the most popular mode of travel for all three types of shopping, but particularly for non-food and main food shopping trips. Relatively low proportions of customers walk or travel by public transport to shop for main food and non-food shopping. However, more households choose to walk or cycle for top-up food shopping trips.

3.31 Figure 3.4 shows car usage is marginally higher for the main food shopping trip than for non-food shopping trips, consistent with Lichfields’ experience of survey results in other areas. Bulk food and grocery shopping trips undertaken once a week or less often would normally involve a car trip in order to carry products home. Based on Lichfields’ experience non-food shopping trips are generally undertaken less frequently. The household survey results in Figure 3.4 indicate bus and walking are slightly higher for non-food shopping than main food shopping in Harborough, but much higher for top-up food and grocery shopping.

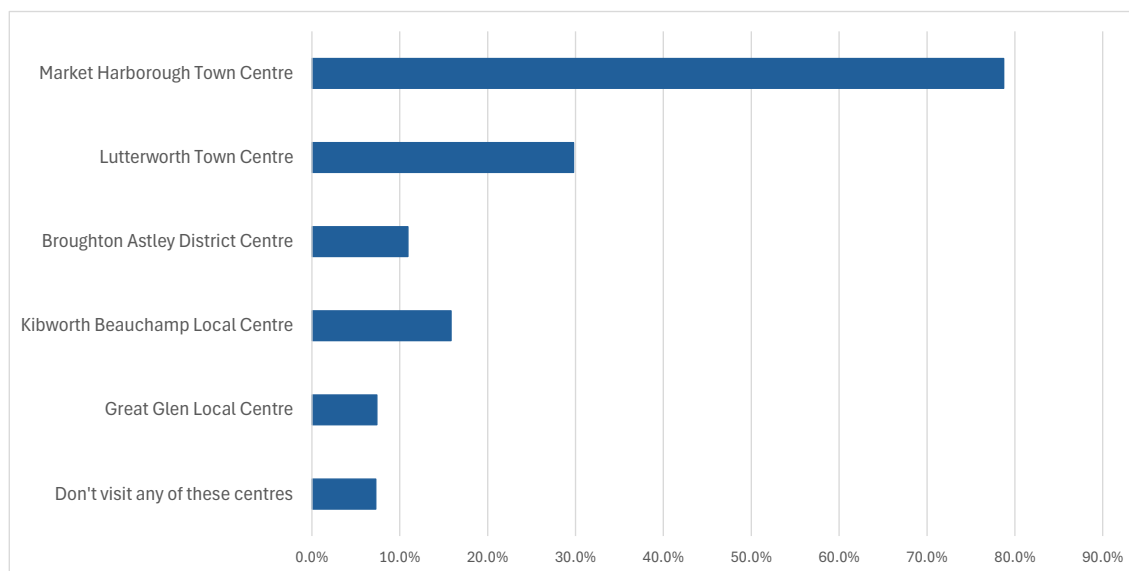
3.32 Car travel for food and non-food shopping was high across all zones. Car travel has remained relatively unchanged since the previous household survey was undertaken in Harborough in 2013, when 87% of households travelled by car for main food shopping and 81% for non-food shopping.

3.33 Based on Lichfields' recent experience, car usage for shopping is generally lower within predominantly urban areas and higher in rural areas i.e. normally below 70% of households for main weekly shopping in urban areas and over 85% in rural areas. Car usage for the main food and grocery shopping trip is generally lower (78%) in Market Harborough urban area (Zone 4) and higher in the rural zones, ranging from 87% to 96%. Lower levels of car usage in urban areas are normally due to higher levels of access to shopping facilities, both on foot and via public transport. The survey results indicate the importance of retaining top-up food and grocery facilities within a reasonable walking distance.

Activities undertaken by visitors to Harborough’s centres

3.34 Respondents to the household survey were asked if they had visited the town, district and local centres in the District during the daytime or evenings to use the shops, services or leisure facilities in the last year. Market Harborough town centre and Lutterworth town centre were the main destinations visited by households in the study area, as shown in Figure 3.5. Only 7% of households had not visited any centre in Harborough District during the last year. However, most of these non-visiting respondents live within the rural zones with higher levels of access to centres outside the District. The results indicate many households had visited more than one centre in the District.

Figure 3.5 Harborough District’s centres visited by households during the last year (% of all study area households)



Source: Harborough NEMS household shopper survey April 2024 (weighted results).

3.35 The average frequency of visits to Market Harborough and Lutterworth town centres was 1.6 visits per week. The average frequency was higher in Broughton Astley at 2.2 visits per week.

3.36 The average length of stay during visits to the three main centres ranges from 46-99 minutes in the town and district centres, as follows:

- Market Harborough 99 minutes;
- Lutterworth 69 minutes; and
- Broughton Astley 46 minutes.

- 3.37 The average length of stay varies significantly and reflects the range and choice of shops, services and facilities available in each centre.
- 3.38 The variety of activities carried out by visitors to each centre is shown in Table 3.1. The results indicate that most households undertake multiple activities in Harborough's centres. Food shopping is the most popular activity in most centres, but Market Harborough and Lutterworth had reasonably high levels of non-food and window shopping. The role of food shopping becomes more significant in the smaller district and local centres.
- 3.39 Shopping remains important to all centre's overall vitality and viability, but a good range of non-retail services is also important. Market Harborough has a high proportion of visitors using cafés/pubs/restaurants suggesting there is a strong evening economy.

Table 3.1 Activities carried out by visitors to each town centre (% of all visitors to each centre)

Activity	Market Harborough	Lutterworth	Broughton Astley	Kibworth	Great Glen	Average for all centres
Shopping						
Non-food shopping	61.5	47.0	34.6	29.4	10.5	36.6
Food shopping	52.4	53.6	54.4	52.5	68.4	56.3
Window shop/browse	12.4	8.6	0.0	0.0	5.2	5.2
Visting the market	6.2	5.9	0.0	0.0	0.0	2.4
Leisure						
Go for a walk	8.3	4.3	0.6	9.3	5.1	5.5
Café/pub/restaurant	49.3	28.1	17.6	23.7	15.7	26.9
Leisure activity	14.1	11.6	13.2	10.8	2.9	10.5
Other services						
Banks/ financial	4.7	1.4	0.4	0.4	2.1	1.8
Health facilities	10.6	18.5	26.4	14.8	11.6	16.4
Library	1.7	3.5	11.8	0.0	4.5	4.3
Getting petrol	5.0	4.7	2.1	0.0	0.0	2.4
Post office	2.3	6.1	7.1	8.8	22.7	9.4
Other service uses	6.6	9.9	10.1	4.3	10.0	8.2
Other activities						
Travelling to/from work	3.2	7.0	5.5	1.4	0.0	3.4
Education/school run	0.6	7.6	0.0	0.0	0.0	1.6
Visting family/friends	4.0	11.4	9.1	11.3	8.3	8.8

Source: NEMS household survey April 2024. * percentages add to more than 100% due to multiple activities.

Demand for Town Centre Uses

- 3.40 In the past, lower expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street. Because of these trends, the UK

average shop vacancy rate (based on Goad Plan data for retail, food/beverage and service units) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but increased back to over 14% in 2023. The current UK vacancy rate is 13.9%. There has been a sharp increase in shop vacancies in many town centres due to the impacts of the Covid-19 pandemic, the cost-of-living crisis and the growth in on-line shopping. The more recent impact of higher inflation and the cost-of-living crisis is also likely to constrain consumer demand, which may affect the demand for floorspace at least in the short term.

- 3.41 Land use information and site visits by Lichfields in May 2024 indicate that there were 33 vacant units in the three main centres in Market Harborough, Lutterworth, Boughton Astley. In 2012, 30 vacant units were identified in these centres, which suggests vacancy levels have only increased marginally despite the national trends identified above. Since 2012, the number of vacant units in Market Harborough has reduced by two units and only increased by one unit in Lutterworth. The highest increase was in Boughton Astley, an increase of four vacant units. The 2024 overall vacancy rate in the District, including local centres in Kibworth, Fleckney and Great Glen was 7.6% of all units. This vacancy rate is much lower than the UK average of 13.9%. However, Boughton Astley district centre has a relatively high vacancy rate of 15.6%. The distribution of vacant units within centres and shop vacancy rates are set out in Table 3.3.

Table 3.2 Vacant shop units in Harborough District

Centre	Number of vacant units	% of all units
Market Harborough	18	6.5
Lutterworth	8	8.0
Boughton Astley	7	15.6
Kibworth	2	6.3
Fleckney	0	0.0
Great Glen	1	14.3
Total	36	7.6

Source: Lichfields' land use surveys May 2024.

- 3.42 A detailed health check of centres in Harborough District is set out in Appendix 2 and the findings are summarised in Section 4.0. In general centres in the District are trading healthily despite difficult market conditions.
- 3.43 The underlying increase in vacant shop units across the UK is primarily due to the reduction of comparison goods retail outlets. In most centres, non-retail services have helped to replace some of the lost comparison goods retail outlets. A more detailed analysis of the mix of uses in the District's main centres compared with the national picture is set out in Appendix 2.
- 3.44 Property owners, landlords and funds have come under increasing pressure with struggling occupiers seeking to renegotiate terms through a company voluntary arrangement (CVA) i.e., an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/leisure assets. These trends were

exacerbated by Covid-19 and the cost-of-living crisis and will continue in the short-term. Market Harborough has experienced these trends for example the closure of the Wilko and Argos stores.

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

Food store operators

- 3.46 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/ Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).
- 3.47 Across the UK the number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. The number of Tesco Express stores has increased by 35%, from 1,427 stores in 2012 to 1,920 stores in 2020 (source: Mintel). During the same period Sainsbury's Local stores increased by 83% and the number of Little Waitrose stores doubled. The number of Asda Express and Morrisons Daily stores has also increased. This trend is not as evident in Harborough District, with only two Tesco Express stores in Market Harborough. The local convenience store sector in the District is dominated by older Co-op stores, which may explain the general absence of smaller convenience stores operated by other food store retailers.
- 3.48 Several proposed larger food superstores have not been implemented across the country, and the permitted Tesco superstore in Market Harborough is an example of this trend. There has been a move away from larger superstores to smaller formats, reflecting changes in some customers' shopping habits i.e. more frequent but smaller food and grocery shopping trips. This trend may have increased with more homeworking during the pandemic lockdowns, which may not move back to pre-Covid levels in the future.
- 3.49 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. These operators are now competing more directly for market share with other main food store operators. Home Bargains and B&M have also expanded rapidly in recent years. This trend is now evident in Harborough with Aldi stores in Market Harborough, Lutterworth and Broughton Astley and a Lidl store in Market Harborough. There is a B&M store in Market Harborough.

Comparison retailers

- 3.50 Comparison retailers responded to difficult market conditions before the Covid-19 pandemic. The bulky goods warehouse sector (i.e. DIY, furniture, floor coverings and electrical goods) had already rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers previously sought large out-of-centre stores, for example Next, TK Maxx and M&S. Matalan also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and

Sports Direct had expanded out-of-centre. These trends have slowed significantly, and in some cases reversed, and are unlikely to re-emerge for the foreseeable future.

- 3.51 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on some retail warehouse parks and proposals to extend the range of goods sold to non-bulky comparison goods. This trend has also led to the relocation of retailers to out-of-centre locations, creating more vacant units in town centres. The discount sector has occupied many units on retail parks e.g. Home Bargains, Poundland and B&M Bargains. Apart from discount stores, the retail warehouse sector is reasonably unrepresented in Harborough, with retail parks in Market Harborough and Lutterworth better characterised as business or industrial parks. There are concentrations of retail warehousing in neighbouring settlements e.g. Leicester, Corby, Kettering and Rugby.
- 3.52 Within most town centres the number of comparison goods outlets has reduced significantly in the last decade. In 2012 comparison goods shops occupied about 40% of UK town centre units. This proportion has reduced to about 28% in 2024, which implies the number of comparison goods outlets has reduced by about 30%. This national trend is evident in Harborough's centres. The number of comparison goods outlets in the three main centres in the District has reduced from 194 in 2012 to 150 in 2024, a decrease of about 23%, which is lower than the UK average reduction of about 30%. These figures suggest Harborough's centres, except for Broughton Astley, have been more successful in retaining comparison goods outlets than most other UK town centres.
- 3.53 This decline in comparison outlets is partly due to many high street multiple comparison retailers changing their format and portfolios. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation into the larger regional and sub-regional centres. Many multiple retailers now require representation in fewer locations to service catchment areas. This trend is evident in most centres in the East Midlands, with the main focus of comparison goods national multiples present in Nottingham, Leicester, Northampton and Peterborough.
- 3.54 In general, operator demand for space has decreased significantly during the last five years and, of those national multiples looking for space, many prefer to locate in larger sub-regional and regional centres e.g. Leicester. Most centres in the District, except for Market Harborough, are at the lower levels in the hierarchy and multiple operator demand will continue to be limited in the future. Polarisation of investment in the larger centres is likely to continue, with many retailers reducing their overall number of outlets. Market Harborough has the best prospects for attracting new multiple retailers but could lose existing operators if consolidation into the largest regional centres continues.
- 3.55 The continuation of these trends will influence future operator space requirements in the District with smaller vacant units and lower tier centres continuing to be less attractive for new multiple occupiers, and retailers increasingly looking to locate into larger units in Leicester. However, demand from smaller independent traders and non-retail services should be strong in the District. Smaller vacant units within Harborough's centres will be attractive to independent businesses looking to serve local catchment areas. Independent traders often provide diversity and a more unique offer than national multiples. A balanced mix between national multiples and independents adds to a centre's vitality and viability.

The centre health checks in Appendix 2 indicate Market Harborough has a strong mix of outlets, whilst the other smaller centres have a higher concentration of independent traders.

Charity and discount shops

3.56 The charity shop sector has grown steadily over the past 30 years and there is no sign this trend will change soon. This trend has raised concerns in some areas regarding over concentrations of charity shops at the expense of other retail uses. Nevertheless, these outlets do provide an important role in offering affordable goods and a service to those wanting to recycle goods.

3.57 Planning policies cannot control the amount of charity shops because they fall within the same use class as other shops (now Class E). In many centres, charity shops have occupied vacated shop premises during previous recessions. This trend is evident in Market Harborough and Lutterworth, where charity shops make up 9.8% and 10.3% of the comparison shops. This provision is comparable with the UK average of 9.9%. Charity shops are less common in the smaller centres, with only one outlet in Kibworth. These figures do not suggest Harborough District's centres have an over-concentration of charity shops.

3.58 Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers.

Non-retail services

3.59 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The non-retail service uses include the following Class E and Sui Generis uses:

- hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as hot food takeaways), funeral parlours and post offices;
- banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies;
- restaurants, cafés and hot food takeaways; and
- pubs/bars.

3.60 The number of bank/building society outlets has decreased significantly during the last two decades, with banks looking to reduce costs and the increase in on-line banking. Nationally, the proportion of town centre units occupied by banks/building societies was 4.6% of all units in 2005. This proportion had reduced to 2.8% in 2017 and was only 1.8% in 2023. Many smaller town centres now have no remaining banks/building societies. The 2024 land use surveys indicated there were only six banks across the District's six centres. Across the UK banks/building societies tend to concentrate their outlets in the largest centres in local areas. This trend is evident in Harborough, with Market Harborough having four banks.

3.61 Banking hubs enable major banks to maintain a high street presence whilst reducing costs, with different banks sharing the same unit and operating on alternating days. This trend is evident in Lutterworth, with five banks sharing the hub on the High Street. The Post Office

also operates out of this location seven days a week. Continued rationalisation of services could lead to an increase in town centre vacancies but is an important route for preserving town centre service offerings.

- 3.62 The growth of money lending/pay day loan shops, betting shops and hot food takeaways has raised concerns amongst many local planning authorities and has resulted in a change to permitted development rights (PDR) to control the growth of these uses in town centres. These growth trends are not particularly evident in Harborough.
- 3.63 There were only three betting shops in the surveyed centres in 2024, which is 1.5% of all units, close to the UK average of about 1%. There are no obvious over-concentrations of betting shops in the District's centres.
- 3.64 There were 28 hot food takeaways in the four main centres, 5.9% of all units, which is below the UK national average of 6.2%. Comparing the two town centres, Lutterworth is above the UK average, with a higher proportion of hot food takeaways (8.0%) than Market Harborough (4.3%). These comparisons do not suggest over-concentrations of hot food takeaways in any of the centres in the District that requires policy interventions.
- 3.65 Changes to the GPDO has had an impact on some town centres but the more recent changes to the Use Classes Order (UCO) and permitted development rights (PDR) are likely to lead to more significant changes in the future. These measures allow for much greater flexibility for changes of use from retail to non-retail uses. To date, these measures have not significantly changed the composition of most town centres, which may have been suppressed by the Covid pandemic. The impact of these changes will need to be carefully monitored by undertaking regular town centre land uses surveys. The mix of uses within the town centres should be quantified, if not annually, every two to three years to monitor key changes and trends that could affect the vitality and viability of the centre. The cost-of-living crisis may increase demand for change from retail to other uses.

The evening economy

- 3.66 Food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage, but primarily in larger centres.
- 3.67 Recently restaurant chains have experienced difficulties resulting in closures, which suggests operators may have over-stretched. Demand continued to increase for coffee shops, such as Starbucks, Costa Coffee and Café Nero. These coffee shop chains have followed fast food operators by also expanding into drive-thru outlets in out of centre locations and on retail parks. National branded pub/restaurant chains invested heavily and not exclusively in larger centres. Themed restaurants also expanded rapidly. This sector in town centres was the most adversely affected by the Covid-19 crisis. The key categories for the food and beverage offer are:
- *Impulse*: characterised by their produce range that is typically highly visual and hand-held so that it can be eaten "on the go";

- *Speed eating fast food*: food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
- *Refuel and relax*: a drink, snack and a short break in a pleasant environment rather than focusing on eating a main meal; and
- *Casual dining/leisure dining*: incorporating several food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

- 3.68 The proportion of non-retail uses within town centres across the UK increased significantly before the Covid-19 crisis. This trend was evident in the District, and this sector appears to have recovered following the Covid crisis.
- 3.69 There were 94 food/beverage outlets in the six centres in Harborough assessed in 2024, 19.9% of all units, which is similar to the UK average of 21.1%. The provision of restaurants/café (47 outlets) is comparable with the UK average (10% of all units). Market Harborough has above-average restaurant/café representation (11.2%), with Lutterworth (8%) below-average.
- 3.70 The provision of hot food takeaways (28 outlets – 5.9%) is slightly below the UK average (6.2%). In line with national trends, the number of restaurant, cafés and hot-food takeaways has increased in Market Harborough town centre from 36 outlets in 2012 to 43 outlets in 2024, a 19% increase. In Lutterworth town centre the number of outlets increased from 11 in 2012 to 16 in 2024, a 45% increase.
- 3.71 There were 19 pubs/bars (4% of all units), which is slightly lower than the UK average (4.9%). The proportion of pubs/bars in Market Harborough town centre is low for a centre of its size (3.6%), whereas Lutterworth town centre is in line with the UK average at 5%.
- 3.72 Overall, Harborough has a reasonably strong evening economy, with a particularly good provision of café/restaurants in Market Harborough town centre and pubs/bars in Lutterworth town centre.

Pop-up spaces

- 3.73 The increase in vacant space across the UK has led to an increase in premises available for temporary uses or pop-up uses including temporary restaurants, bars, shops and galleries. Some landlords have opted for flexible leases, with changing attitudes towards short-term spaces. New independent brands have benefitted despite the lack of brand recognition. E-commerce brands have also sought physical presence, as an essential part of their marketing strategy and an effective way to engage with existing and new customers off-line. Brands have opened pop-up outlets in different locations to test and learn before committing to permanent stores. This trend may increase during the cost-of-living crisis but has not been particularly evident in Harborough District. Pop-up spaces have primarily occurred in large managed shopping centres e.g. in regional centres.

Summary

- 3.74 The trends and changes highlighted in this section, including the growth of home shopping, are not new and have been affecting the high street for many years. In response to these

trends, most town centres have changed and diversified, but the number of comparison goods outlets has declined significantly, whilst shop vacancies have increased. The food/ beverage, leisure and non-retail service sectors have to some extent been successful in occupying space no longer attractive to retail tenants, but the vitality and viability of many centres has declined. Nationally there have been cyclical trends in vacancy rates reflecting the macro-economic trends, but in most cases, town centres recovered during periods of stronger growth. Many believe the most recent decline is structural rather than cyclical and a more flexible approach to town centre uses is required.

- 3.75 The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The Goad national shop vacancy rate has increased to over 14% and therefore a cautious approach to future development needs is required. The implications of the cost-of-living crisis also endorse a cautious approach to providing additional retail floorspace, particularly in out-of-centre locations.
- 3.76 These national trends have been evident in District's centres but the centre health check assessments in Appendix 2 suggest more resilience in Harborough's centres. For example, the shop vacancy rate in the District remains relatively low at 7.6%, significantly below the UK average (13.9%), apart from Broughton Astley (15.6%). The number of comparison goods retail outlets have reduced in Harborough's centres but at a much lower rate than the UK average. The centre health checks indicate Market Harborough and Lutterworth town centres are performing well, particularly in relation to the position in 2013 and the UK average. Broughton Astley district centre has experienced some decline since 2013 but is still performing satisfactorily in difficult market conditions. An analysis of the mix of uses and the role of centres in Harborough is set out in Section 4.0.
- 3.77 Shopping behaviour will continue to change, and Harborough's centres will need to respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail, leisure and cultural experience for those looking for a "day out" or "evening out".

4.0 Hierarchy of centres

National policy

- 4.1 The NPPF (paragraph 86) indicates 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. Town centres as defined in the NPPF comprise a range of locations where main town centre uses are concentrated, including city and town centres, district and local centres. Local centres exclude small parades of shops of purely neighbourhood significance. The NPPF and PPG provide limited guidance on how to categorise town, district and local centres.

Designated centres in Harborough

- 4.2 The Harborough Local Plan 2011-2031 identifies three categories of retail centres in policy RT2, 'Town and Local Centres' which has been carried forward to the February 2024 'Issues and Options' document. The retail hierarchy is as follows:

Town Centres

- Market Harborough
- Lutterworth

District Centres

- Broughton Astley

Local Centres

- Kibworth
- Fleckney
- Great Glen

- 4.3 A detailed health check of the town and district centres in Harborough District is set out in Appendix 2. These centre health checks include an analysis of the mix of uses compared with the District and UK averages and a qualitative assessment of the centre's vitality and viability. Some of key findings are summarised in this Section. In general centres in the District have a good mix of retail and non-retail services and are trading healthily despite difficult market conditions.

- 4.4 Each centre performs a particular role to meet the needs of its catchment population and is part of a network of centres within the District.

- Town Centres are described as usually being the principal centre within a Local Authority, functioning as important service centres for extensive rural catchment areas.
- District centres are comprised of groups of shops, often with one superstore/ supermarket and a range of non-retail services such as banks, building societies, restaurants, and public facilities such as libraries.

- Local centres contain a range of local, small shops, serving a small catchment. They typically include a small supermarket, newsagent, sub-post office and a pharmacy amongst other shops.

4.5 The Council wants to improve and protect these centres for the communities they serve, by ensuring retail development and other main town centre uses are directed to the most sustainable and accessible locations.

Scale and mix of uses within Harborough’s centres

4.6 Harborough District lies within complex shopping catchment areas, which include Leicester as a regional centre and Corby, Kettering, Northampton and Rugby influencing shopping patterns to varying extent across the District. Within the district Market Harborough is by far the largest centre, followed by Lutterworth and then the smaller centres in Broughton Astley and Kibworth.

4.7 The number of retail, food/beverage and non-retail service outlets in each centre is shown in Table 4.1. Market Harborough and Lutterworth are the largest centres with a good choice of retail outlets, food/ beverage and service uses. Market Harborough has 112 comparison goods outlets, which is over 69% of all comparison goods outlets in centres across the District. Kibworth is much larger than the other local centres at Fleckney and Great Glen and is only marginally smaller than Broughton Astley district centre, in terms of occupied units (30 compared with 38 occupied units). The Council could consider whether Kibworth should be upgraded to district centre status, alongside Broughton Astley.

Table 4.1 Town, district and local centres in Harborough District – number of outlets by use

	Total units	Comparison goods retail	Convenience goods retail	Food/ beverage	Other services*	Vacant units
Market Harborough TC	278	112	26	53	69	18
Lutterworth TC	100	29	9	21	33	8
Broughton Astley DC	45	9	4	7	18	7
Kibworth LC	32	10	3	8	9	2
Fleckney LC	11	1	2	4	4	0
Great Glen LC	7	1	2	1	2	1
Total	473	162	46	94	135	36
% all units	100.0	34.2	9.7	19.9	28.5	7.6

Source: Lichfields’ land use survey May 2024.

* excluding office, leisure, community and residential uses.

4.8 These centres offer a range of facilities serving local communities across the District. Each centre has an important role in serving the day-to-day needs in their local areas.

4.9 The household survey results also shed light on the position of each centre in the hierarchy. Respondents were asked at which location they buy most of their household’s non-food shopping. Respondents were also asked which of the main centres in the District they had visited to use shops, services and leisure facilities in the last year, and the survey results are shown in Table 4.2.

Table 4.2 Destinations used by households (% of all respondents in the study area)

Destination	Visited during the last year	Main non-food shopping destination
Market Harborough town centre	78.7	27.3
Lutterworth town centre	29.8	5.8
Broughton Astley district centre	10.9	0.5
Kibworth local centre	15.8	0.1
Great Glen local centre	7.4	0.1
Fleckney local centre	n/a	0.2

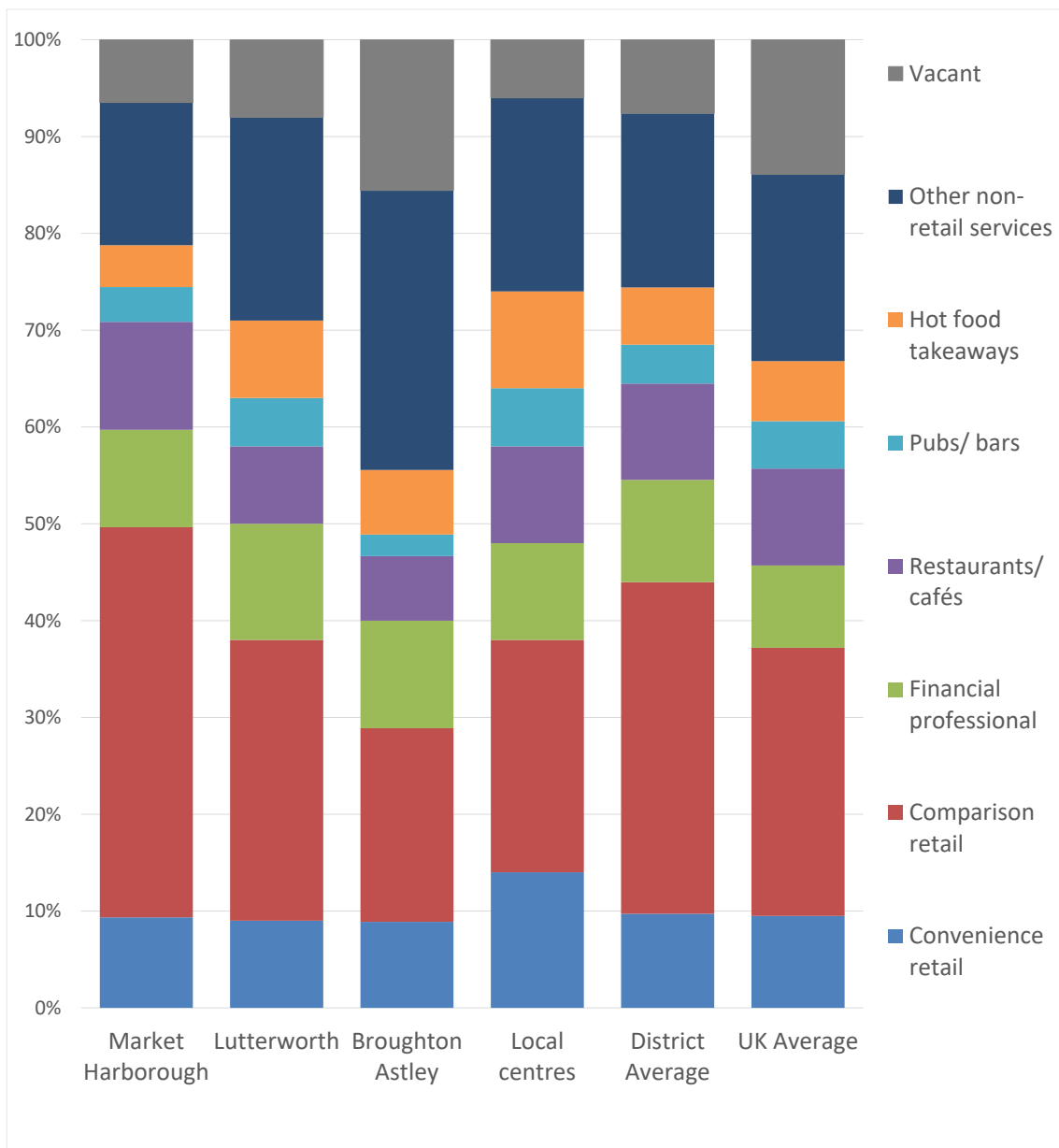
Source: NEMS household survey (April 2024)

- 4.10 Market Harborough is the main non-food shopping destination in the District, followed by Lutterworth. The proportion of all respondents in the study area who do most of their non-food shopping at other district and local centres is very low (ranging from 0.1% to 0.5%), which reflects their size, low number of comparison goods shops and limited importance in the wider hierarchy. A high proportion (27.6%) of respondents do most of their non-food shopping via the internet/delivery. Many main non-food destinations located outside Harborough District were mentioned by respondents, including Leicester city centre (2.8%), Fosse Park (4.5%) Corby (5.4%), Kettering (3.8%), Rugby (2.9%) and Northampton (1.1%).

Diversity of main town centre uses

- 4.11 Figure 4.1 below shows the composition of the three centres and local centres in terms of the mix and proportion of different uses i.e. the proportion of shop units within each use class. This is compared with the District and Goad Plan average mix for centres across the UK. More detail is provided in the health check analysis in Appendix 2.
- 4.12 The overall mix of use in the District is broadly in line with the UK average in terms of convenience goods retail, restaurants/cafes, hot food takeaways and other non-retail services. The District has a higher than average provision of comparison goods retail and financial and professional services. Vacant units and the provision of pubs/bars is below the UK average.
- 4.13 All centres have a reasonable mix of retail and service uses, but Broughton Astley has a lower proportion of comparison goods retail uses than the District and UK averages. Comparison retail is best represented in Market Harborough, but its provision of non-retail services is below the District and UK average. All centres have above average provision of financial/professional services and above-average non-retail service provision.
- 4.14 Convenience goods retail provision, in terms of the proportion of all units, is broadly in line with the UK average in all assessed centres, with all centres having at least one large food store suitable for main and bulk food shopping within its defined centre. Convenience retail takes up a larger proportion of all units in Local Centres. The vacancy rates in town centres in the District are generally lower than the current UK average of 13.9%, but Broughton Astley has a high vacancy rate of 15.6%.

Figure 4.1 Mix of retail and service uses (excluding office, industrial, medical, community and residential uses) - % of all units



Source: Lichfields' land use survey May 2024 and Experian Goad Plan UK averages.

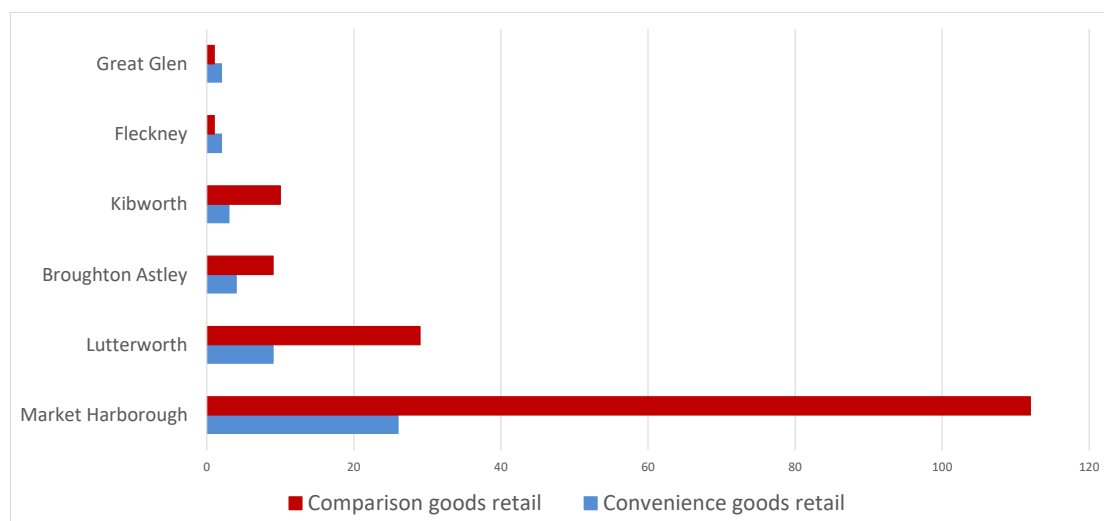
Retailer representation

4.15

Figure 4.2 compares the proportion of convenience and comparison retail units within centres. Most of the District's comparison and convenience goods retail outlets are focused in Market Harborough and to a lesser extent Lutterworth. In general, larger centres tend to have a higher proportion of comparison goods shop units than smaller centres. Larger centres tend to have a stronger focus on fashion shopping and therefore have a higher proportion of comparison shops. Smaller centres tend to have a higher proportion of convenience goods units and non-retail services, catering for the day to day needs of their local catchment area. Convenience goods retail and non-retail services perform an

important role in all centres, serving relatively localised needs. A more detailed analysis of the mix of retail uses in each centre is shown in the town centre health checks in the Appendices.

Figure 4.2 Comparison and convenience goods retail outlets (number of units)



Source: Lichfields' land use survey May 2024.

Service Uses

4.16 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. Figure 4.3 below summarises the number of outlets in different service categories in the town and district centres and the local centres combined. The service uses fall into three main categories as follows:

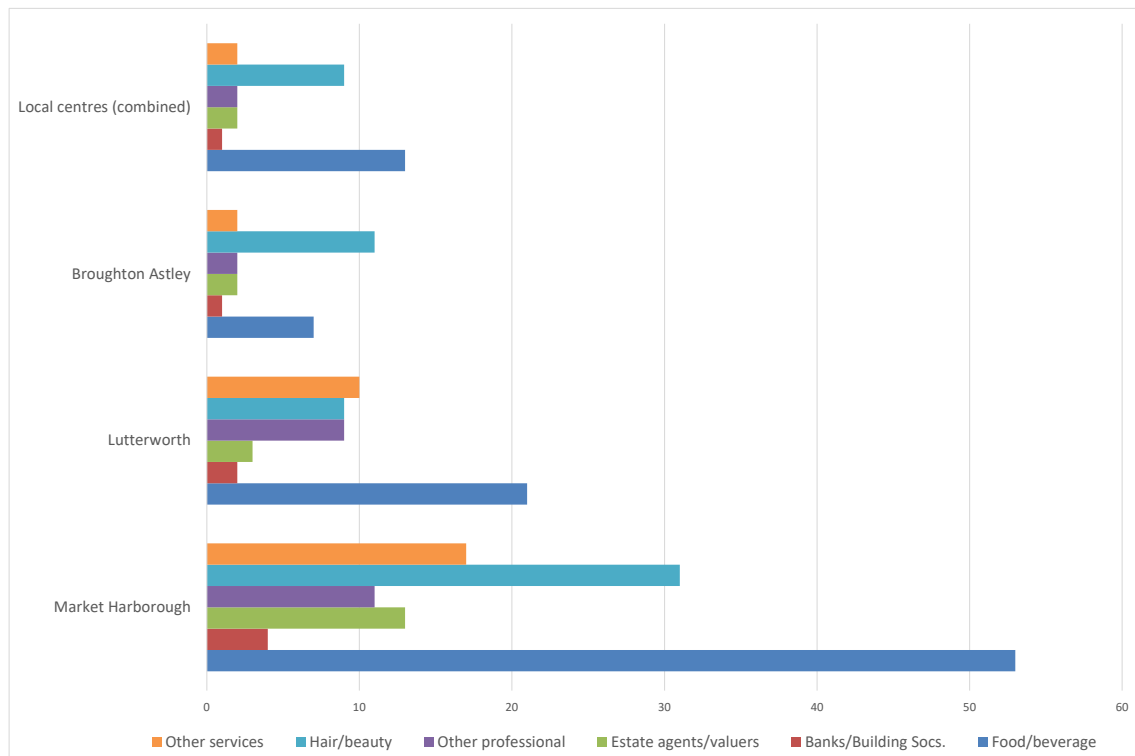
- financial and professional services:
 1. including banks, building societies;
 2. estate agents;
 3. other professional services, such as solicitors, accountant and employment agencies;
- food/beverage uses including restaurants, cafés, pubs, bars and hot food takeaways;
- other non-retail services:
 1. hair and beauty salons; and
 2. other services, such as dry-cleaners, travel agents, funeral parlours and post offices.

4.17 Market Harborough town centre has the largest number of food/beverage outlets, particularly restaurants/cafés. Broughton Astley has a relatively strong provision of hairdressers/beauty salons for a centre of its size.

4.18 All three main centres have a reasonable range of other non-retail services, particularly hair/beauty salons. Provision of financial and professional services is aligned with settlement size. The provision of banks/building societies is concentrated in Market

Harborough, consistent with the national trend where banks/building societies tend to concentrate their outlets in the largest centres in local areas. A more detailed analysis of the mix of services uses in each town centre is shown in the centre health checks in Appendix 2.

Figure 4.3 Distribution of non-retail service uses (number of outlets)



Source: Lichfields' land use survey May 2024.

Access to local shops and services

4.19

In addition to the centre health checks in Appendix 2 and the analysis in this section, a local needs index analysis for each centre has been undertaken based on the provision of shops, non-retail services and community uses. The focus is to assess the needs of residents and to what extent each centre is meeting these needs. There is no clear definition of need, but it is considered that residents could expect to find some, or most of the following shops, services and community uses within easy walking distance of their home:

- food or convenience store suitable for top-up shopping;
- bank;
- post office;
- newsagent;
- off licence;
- chemist;
- takeaway, café or restaurant;
- public house;
- bookmakers;
- laundrette/dry cleaners;

- hairdressers/beauty salon/barber;
- florist;
- estate agents;
- community hall;
- doctor's surgery; and
- library.

4.20 Each designated centre in the District has been allocated a score out of 16, based on the number of categories of shops and services listed above (one point per category represented in the centre). The local needs index analysis is set out in Tables 4.3 and 4.4.

Table 4.3 Harborough District – Local Needs Index Summary

Centre	Local Needs Index (score out of 16)	Number of convenience goods retail outlets
Market Harborough town centre	16	26
Lutterworth town centre	15	9
Broughton Astley district centre	10	4
Kibworth local centre	10	3
Fleckney local centre	9	2
Great Glen local centre	8	2

Source: Lichfields’ land use survey May 2024.

Table 4.4 – Harborough District Local Needs Index

	Market Harborough	Lutterworth	Broughton Astley	Kibworth	Fleckney	Great Glen
Food/ convenience						
Banks						
Post office						
Newsagent						
Off licence						
Chemist						
Takeaway, café or restaurant						
Public house						
Bookmakers						
Launderette, dry cleaner						
Hairdresser, beauty salon						
Florist						
Estate agents						
Community hall						
Doctor’s surgery						
Library						

Source: Lichfields’ land use survey May 2024.

4.21 Market Harborough and Lutterworth town centres have high local needs index scores with most of the 16 categories represented. Broughton Astley and the three local centres have reasonably high scores with at least 8 of the 16 categories represented in each centre. All centres have at least one convenience goods shop, post office, chemist, hairdresser or

barber, hot food takeaway or café and library. The local needs index scores and analysis provide a useful indicator of whether a town, district or local centre is meeting some or all the needs of residents. Broughton Astley and Kibworth have similar provision, which also suggests the latter could be upgraded to district centre status.

Summary

- 4.22 The analysis in this section indicates the District has a well-established network of centres that serve their respective areas. The overall mix of use in the District is broadly in line with the UK average. All centres have retained a reasonable mix of retail and service uses and have performed well in comparison with national trends identified in Section 3.0. Market Harborough is the only centre with a district-wide catchment area, but the other centres adequately serve their local catchment area. Shop vacancy rates are relatively low, but Broughton Astley has the highest shop vacancy rate, above the UK average.
- 4.23 Continuing to designate town, district and local centres in the new Local Plan remains appropriate and important in terms of:
- ensuring the vitality and viability of centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
 - directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
 - identifying a viable and complementary role and strategy for each centre, recognising their different strengths and potential.
- 4.24 The network of centres should be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping and leisure patterns. The implications of these factors for future policy and strategy are addressed in later sections of this report.
- 4.25 Only one potential modification to the designation of centres has been identified. The Council could consider upgrading Kibworth to district centre status, alongside Broughton Astley. Kibworth has a similar number of retail and service uses (Table 4.1) and a similar mix of activities undertaken (Table 3.1) when compared with Broughton Astley. Kibworth also has the same local needs index score (Tables 4.3 and 4.4). A higher proportion of household survey respondents had visited Kibworth in the last 12 months, 15.8% compared with 10.9% visiting Boughton Astley (Table 4.2). The retail capacity assessment in Section 5.0, suggests Kibworth has a similar comparison goods turnover when compared with Broughton Astley, but a much lower convenience goods turnover. However, Broughton Astley's convenience goods turnover includes the out-of-centre Aldi store.

5.0 The need for retail and food/beverage uses

Introduction

- 5.1 This section assesses the quantitative and qualitative need for retail and food/beverage uses in Harborough's town, district and local centres to 2041. The National Planning Policy Framework (NPPF) indicates that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping and food/beverage (eating and drinking away from the home) which are then converted into floorspace estimates.

Assumptions and base data

- 5.2 All monetary values expressed in this study are at 2022 prices, consistent with Experian's base year expenditure figures for 2022, which are based on actual recorded expenditure levels rather than projections.

Study area zones

- 5.3 A household telephone survey was undertaken during April 2024. The primary catchment area of Market Harborough extends beyond the District boundary to the south and southeast, as indicated by previous household survey results undertaken in 2012. The study area and explanation are shown in Appendix 1. This study area is based on ward boundaries and covers a similar area covered in the previous 2013 study. The study area has been subdivided into six zones based on ward areas to reflect the primary catchment areas of the main centres in the District.
- 5.4 The projected population within each zone between 2024 to 2041 is set out in Table 1 in Appendix 3, sourced from Experian. The base year 2024 population within the study area is 129,633. This population is projected to increase to 145,917 by 2041, an increase of +12.6%.

Retail expenditure

- 5.5 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2022 have been obtained.
- 5.6 Experian's latest national expenditure information (Experian Retail Planner Briefing Note 21 – February 2024) has been used to forecast expenditure within the study area. The next briefing is not expected to be available until February 2025. Experian's short-term growth forecast rates during 2023, 2024 and 2025 reflect current economic circumstances, including Covid-19 and the cost of living crisis. The forecast changes during this period are as follows:
- convenience goods: -3.6%;
 - comparison goods: -1.9%;
 - leisure: -1.0%.

5.7 These short-term forecasts reflect post Covid lockdown re-adjustments during 2022 and 2023. Convenience goods expenditure increased during the lockdowns with households eating out less often than before the pandemic. Convenience goods expenditure is forecast to decline during 2023, 2024 and 2025. Comparison goods and leisure expenditure, including eating and drinking out, reduced significantly during the lockdowns. The leisure sector recovered during 2022, but a small decline is forecast during 2023 and 2024. The comparison goods retail sector is expected to decline during 2023 and 2024.

5.8 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's medium and long-term growth average forecasts have been adopted. These longer-term forecasts reflect Experian's views on the post Covid and cost of living crisis recovery. The growth forecasts relate to real growth and exclude inflation, as follows:

- convenience goods: no growth during 2026 to 2030 and +0.1% growth per annum beyond 2030;
- comparison goods: +3.1% per annum growth for 2026 to 2030 and +2.8% per annum beyond 2030; and
- leisure: +1.1% per annum growth for 2026 to 2030 and +0.8% per annum after 2030.

5.9 Experian's latest adjusted deductions for SFT (i.e. home and online shopping through non-retail businesses) in 2024 are:

- 5.2% of convenience goods expenditure; and
- 24.3% of comparison goods expenditure.

5.10 Experian's projections suggest that these percentages will increase to 7.4% and 29.7% by 2039, respectively.

5.11 Table 2, Appendix 3 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2041, excluding SFT/on-line sales through non-retail businesses. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2, Appendix 4 and food/beverage expenditure is shown in Table 2, Appendix 5.

5.12 Based on forecast changes in population and per capita spending (excluding SFT), total convenience goods spending within the study area is forecast to increase by +11% from £331.15 million in 2024 to £367.75 million in 2041, as shown in Table 3, Appendix 3.

5.13 Comparison goods spending is forecast to increase by +69.7% between 2024 and 2041, increasing from £446.06 million in 2024 to £756.99 million in 2041, as shown in Table 3, Appendix 4.

5.14 Food and beverage spending is forecast to increase by +30.8% between 2024 and 2041, increasing from £249.87 million in 2024 to £326.74 million in 2041, as shown in Table 3, Appendix 5

Growth in Turnover densities

5.15 Experian's Retail Planner Briefing Note 21 - February 2024 indicates comparison goods retail sales floorspace is expected to reduce its average sales density by -1.1% during 2024

and 2025 but will grow in the medium term (+2.6% per annum during 2026 to 2030), and longer term (+2.6% per annum beyond 2030). These forecast increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the likely high increase in on-line/home shopping through retail businesses.

- 5.16 For convenience goods retail, Experian indicates a -0.1% decline in sales densities during 2024 and 2025 but will grow in the medium term (+0.2% per annum during 2026 to 2030) and +0.1% per annum thereafter.
- 5.17 For leisure facilities, including food/beverage floorspace, Experian indicates a -0.8% decline in sales densities during 2024 and 2025; a small average increase of 0.5% per annum during 2026 to 2030; and 0.2% growth per annum in sales densities thereafter.

Base year market shares

- 5.18 The turnover of facilities within Harborough District is estimated based on the market shares or penetration rates. To assess the capacity for new floorspace, penetration rates have been estimated for shopping and food/beverage facilities based on a household shopper survey undertaken in April 2024. The market shares for convenience goods and comparison goods shopping are shown in Table 4, Appendix 3 and Table 4, Appendix 4, respectively. The market shares for food and beverage expenditure are shown in Table 4, Appendix 5.
- 5.19 The results of the household shopper survey regarding main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The market shares in Table 4 in Appendix 3 are a combined rate for both main and top up shopping based on a 70:30 split. The split between last main trip and other main trip is 50:20. These splits are based on Lichfields' experience and is widely accepted in retail studies of this kind.

Table 5.1 Food and grocery trip retention in Harborough District (% of all trips in each zone)

Zone	Main last trip	Main other trip	Top-up	Combined market share
1 – Lutterworth	76.3	80.5	98.3	83.7
2 – Broughton Astley / Fleckney	58.1	61.5	84.9	66.8
3 – Great Glen / Kibworth	41.2	53.7	75.7	54.0
4 – Market Harborough	84.9	75.7	97.7	86.9

Source: NEMS household survey results April 2024

- 5.20 Harborough District retains a relatively high share of convenience goods shopping trips in Market Harborough and Lutterworth (Zones 1 and 4). The District's market shares are lower in the rural parts of the District and the areas closer to Leicester (Zones 2 and 3), where a significant proportion of food and grocery trips are attracted to food stores in Leicester, Oadby, Wigston and Blaby.
- 5.21 These figures indicate that most residents undertake their food and grocery shopping close to where they live albeit predominantly by car for main food shopping trips. The household survey results and distribution of food stores within and surrounding the study area suggest there may be limited potential for Harborough District to increase its market share of convenience goods expenditure in the future.

5.22 The market shares for comparison goods shopping in Table 4, Appendix 4 are based on a weighted average for each comparison goods category included within the household survey e.g. clothing/footwear, electrical, furniture, floorcoverings, DIY and health and beauty products. The survey results suggest lower levels of comparison goods expenditure retention for all goods categories within the Harborough District zones, as shown in Table 5.2. The market shares are also higher in the Market Harborough area (Zone 4) and much lower in the west of the District.

Table 5.2 Non-food comparison trip retention (% of all trips in each zone – excluding internet shopping)

	Clothing footwear	Domestic electrical	Other electrical	Furniture floor-covering textile	DIY hardware garden	Health beauty	Books stationery	Toys hobbies pets	Other non-food	Combined weighted Market share
1 – Lutterworth	13.7	34.1	24.1	28.0	43.7	37.4	50.9	39.9	37.7	31.4
2 – Broughton Astley/ Fleckney	7.5	35.5	13.3	7.9	45.6	27.7	35.3	20.6	27.7	20.8
3 – Great Glen/ Kibworth	24.2	14.9	7.4	18.5	53.9	54.5	51.2	44.5	36.6	33.8
4 – Market Harborough	34.5	21.3	12.1	40.6	64.9	79.1	83.3	72.8	65.1	52.4

Source: NEMS household survey results April 2024

5.23 The retention of comparison goods expenditure is generally lower for higher order goods e.g. clothing, electrical goods and furniture but higher for day-to-day goods e.g. health/beauty and books/stationery. There could be potential to increase Harborough District’s market share of expenditure in certain categories, if available shopping facilities were improved. However, this potential would be counter-balanced by any improvements in other destinations surrounding the District. The polarisation of comparison goods operator demand in larger regional centres, as outlined in Section 3.0, and high levels of accessibility to competing centres will limit the potential for Harborough District to increase its market share of comparison goods expenditure. The retail capacity assessment assumes Harborough District can maintain its current market share of comparison goods expenditure and realistic improvements to shopping facilities are likely to be necessary to achieve this.

5.24 The results of the household shopper survey regarding eating and drinking away from the home have been used to estimate existing food and beverage expenditure patterns. The market shares in Table 4 in Appendix 5 are a combined rate for both eating out and drinking at pubs/bars are based on an 80:20 split, based on Experian’s local expenditure data. The survey results suggest reasonably high levels of expenditure retention within the study area, as shown in Table 5.3.

5.25 The survey results suggest lower levels of food/beverage expenditure market share than for convenience goods shopping, but higher than for comparison goods shopping. The District’s market shares are lower in the rural parts of the District (Zones 2 and 3) and highest in Market Harborough.

Table 5.3 Food and beverage trip retention in Harborough District (% of all trips in each zone)

Zone	Eating out	Drinking away from home	Combined market weighted share
1 – Lutterworth	59.5	82.2	64.0
2 – Broughton Astley/ Fleckney	45.8	50.7	46.8
3 – Great Glen/ Kibworth	54.6	59.7	55.6
4 – Market Harborough	78.8	90.0	81.1

Source: NEMS household survey results April 2024.

Capacity for convenience goods retail floorspace

5.26 Based on the market shares calculated from the April 2024 household survey results, available convenience goods expenditure attracted to facilities in the District in 2024 is shown in Table 5, Appendix 3. This expenditure has been projected forward to 2026, 2031, 2036 and 2041, and is summarised in Table 11, Appendix 3. Convenience goods expenditure available to facilities in the District is expected to increase from £210.73 million in 2024 to £237.33 million in 2041. This increase is due to population growth. A breakdown of the turnover of convenience goods retail facilities located in each study area zone is set out in Table 5.4.

Table 5.4 Convenience goods base year turnover in 2024 (household survey based turnover)

Zone	Turnover £M
1 - Lutterworth	52.56
1 - other	1.85
2 - Broughton Astley	19.79
2 - Fleckney	4.31
3 - Great Glen	4.65
3 - Kibworth	7.35
3 - other	0.74
4 - Market Harborough	119.47
Total	210.73

Source: Table 11 in Appendix 3.

5.27 The benchmark turnover of the main food stores in the District is calculated in Table 10 in Appendix 3. The benchmark turnover is based on the sales area within each store and the respective company average sales densities. This turnover is not necessarily the actual turnover of the store, but it provides a useful benchmark to assess how well existing facilities are trading. The combined benchmark turnover of identified food stores in the District is estimated to be £183.21 million. This benchmark turnover excludes small convenience good shops in the District. Nevertheless, these estimates suggest food stores in the District are trading healthily, particularly in Market Harborough.

5.28 Table 11 in Appendix 3 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus/deficit expenditure that may be available for new development in the future. The proposed relocation of the Aldi store from Springfield Street to Rockingham Road is expected to increase the benchmark turnover of the store by £5.34 million, as shown in Table 10, Appendix 3. The redevelopment and replacement of the Co-op store in Great Glen is expected to increase the benchmark turnover of the store by £0.54 million, also shown in Table 10, Appendix 3. The additional turnover of these two replacement stores is subtracted from 2026 onwards.

- 5.29 The deficit/surplus expenditure projections are converted into floorspace estimates in Table 12 in Appendix 3 based on a combined approximate company average sales density of £12,000 per sq.m net of the main food store operators. The results are summarised in Table 5.5. The negative floorspace figures are destinations where the growth in population/expenditure will be offset by growth in sales densities and the implementation of planning commitments, resulting a theoretical over-supply of retail floorspace.

Table 5.5 Convenience goods floorspace capacity (sq.m gross) - cumulative

Zone	2026	2031	2036	2041
1 - Lutterworth	-20	0	80	180
1 - other	0	0	0	10
2 - Broughton Astley	0	10	40	90
2 - Fleckney	0	0	10	20
3 - Great Glen	-50	-30	0	30
3 - Kibworth	10	50	100	150
3 - other	0	0	10	10
4 - Market Harborough	-530	-170	290	810
Total	-590	-140	530	1,300

Source: Table 12 in Appendix 3.

Qualitative need

- 5.30 Food store provision in the District is set out in Table 10, Appendix 3. Convenience goods sales floorspace in these main stores totals over 18,000 sq.m net. Collectively the designated town, district and local centres in the District have 46 convenience goods outlets including food stores operated by multiple retailers and small independent shops.
- 5.31 Main shopping trips traditionally are generally made once a week or less often, although recently households have increasingly undertaken top-up shopping trips. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large food stores are the usual destination for these types of bulk food shopping trips.
- 5.32 There is only one food superstore of over 2,000 sq.m net in the District i.e. Sainsbury's in Market Harborough (2,357 sq.m net). The Morrison's store in Lutterworth is smaller (1,864 sq.m net) but still provides a good range and choice of products. The Waitrose stores in Market Harborough and Lutterworth have net sales area of around 1,100 to 1,200 sq.m net and are also suitable for main and bulk food shopping.
- 5.33 The discount sector is well represented in the District with Aldi stores in Market Harborough, Lutterworth and Broughton Astley and a Lidl store in Market Harborough. These discount stores range from 856 sq.m net to 1,200 sq.m net. Aldi is proposing to relocate to a larger store in Market Harborough, increasing the store from 856 sq.m net to 1,315 sq.m, net.
- 5.34 These large food stores are concentrated in Market Harborough, Lutterworth and Broughton Astley. Large stores are complemented by a selection of smaller stores suitable for top-up food and grocery shopping including eight Co-op stores and two Tesco Express stores. The three local centres in Fleckney, Great Glen and Kibworth Beauchamp each have

a Co-op store ranging from about 300 to 500 sq.m net, which are suitable for top-up food shopping.

5.35 Residents in the north and west of the District also have good access to large food stores in the Leicester area and Rugby. Residents across the main settlements have reasonable access to a range and choice of food stores and there are no obvious areas of deficiency in food store provision, which reflects the high expenditure retention rates highlighted in Table 5.1 in Zones 1 to 4.

Capacity for comparison goods floorspace

5.36 Available comparison goods expenditure has been projected to 2026, 2031, 2036 and 2041 and is summarised in Table 10 in Appendix 4. Comparison goods expenditure available to facilities in the District is expected to increase from £155.75 million in 2024 to £267.2 million in 2041. A breakdown of the turnover of comparison goods retail facilities located in each study area zone is set out in Table 5.6.

Table 5.6 Comparison goods base year turnover in 2024 (household survey based turnover)

Zone	Turnover £M
1 - Lutterworth	25.85
1 - other	3.57
2 - Broughton Astley	2.24
2 - Fleckney	0.35
3 - Great Glen	0.36
3 - Kibworth	1.93
3 - other	1.38
4 - Market Harborough	120.07
Total	155.75

Source: Table 9 in Appendix 4.

5.37 There are 162 comparison goods outlets in town, district and local centres in the District. The combined turnover of these destinations is £150.8 million. These estimates suggest an average turnover of about £0.9 million per outlet, although there are other outlets located outside of designated centres, which would reduce this average. Nevertheless, comparison goods outlets in the District appear to be trading satisfactorily, which is supported by this high average turnover per outlet and the lower than average shop vacancy rate.

5.38 Table 9 in Appendix 4 subtracts the turnover of existing floorspace including an allowance for growth in turnover densities. The projections suggest future growth in available expenditure will be partially offset by expected growth in turnover densities i.e. existing retail businesses will absorb expenditure growth. This assumption is consistent with Experian's projected growth in non-store sales taken by retail businesses. The growth in retail operator's turnover densities will in part be fuelled by on-line sales and click and collect (from stores or collection points), which will not directly affect the need for additional retail sales floorspace. The deductions already made for SFT only relate to non-store sales through non-retail businesses.

5.39 In 2026 there is a projected small expenditure surplus of +£1.66 million, increasing to £26.56 million in 2041. These projections suggest growth in turnover densities will absorb

most of the future expenditure growth. The expenditure projections have been converted into floorspace estimates Table 11 in Appendix 4. The results are summarised in Table 5.7.

Table 5.7 Comparison goods floorspace capacity (sq.m gross) - cumulative

Zone	2026	2031	2036	2041
1 - Lutterworth	30	150	270	460
1 - other	0	10	30	50
2 - Broughton Astley	0	10	20	30
2 - Fleckney	0	0	0	10
3 - Great Glen	0	10	10	20
3 - Kibworth	10	30	50	70
3 - other	0	20	30	40
4 - Market Harborough	330	1,300	2,220	3,450
Total	370	1,530	2,630	4,130

Source: Table 11 in Appendix 4.

Qualitative need

- 5.40 Collectively town, district and local centres in the District have 162 comparison goods outlets. This includes a mix of national multiples and small independent shops. Market Harborough has a reasonable provision of retail warehouses and quasi-retail uses including B&M Home Store/ Garden Centre, Carpetright, Halfords, Homebase, Jewsons, Pets at Home, Screwfix, The Home Outlet and Topps Tiles.
- 5.41 As indicated in Section 3, Market Harborough and Lutterworth town centres have a reasonable number of comparison goods outlets, but the leakage of higher order comparison goods expenditure to larger shopping destinations in Leicester and Rugby is relatively high. The analysis of centres in Appendix 2 indicates the range and choice of comparison goods shops is much higher in Market Harborough town centre. Most categories of comparison goods shops are available in Market Harborough and to a lesser extent Lutterworth, but the choice within some categories is limited. The range and choice of comparison goods shops in the local centres is very limited.
- 5.42 Overall, the accessibility for residents in the District to a range and choice of comparison goods shopping destinations is reasonable, taking into account the overlapping catchment areas with larger shopping destinations in Leicester and Rugby. Residents in the study area have the choice of many comparison goods shopping destinations within and just outside the District and there are no obvious areas of deficiency.

Capacity for food/beverage floorspace

- 5.43 Available food and beverage expenditure has been projected forward to 2026, 2031, 2036 and 2041, and is summarised in Table 10 in Appendix 5. The amount of expenditure attracted to the District is expected to increase from £144.02 million in 2024 to £187.87 million in 2041. A breakdown of the turnover of facilities located in each zone is set out in Table 5.8.

Table 5.8 Food and beverage base year turnover in 2024 (household survey based turnover)

Zone	Turnover £M
1 - Lutterworth	10.80
1 - other	10.53
2 - Broughton Astley	10.68
2 - Fleckney	0.20
2 - other	6.43
3 - Great Glen	1.41
3 - Kibworth	6.21
3 - other	16.49
4 - Market Harborough	81.27
Total	144.02

Source: Table 9 in Appendix 5.

5.44 There are 94 food and beverage outlets in town, district and local centres in the District. The combined turnover of these destinations is £110.57 million. These estimates suggest an average turnover of just under £1.2 million per outlet, although there are other outlets located outside of designated centres, which would reduce this average. Nevertheless, food and beverage outlets in the District appear to be trading satisfactorily, which is supported by this relatively high average turnover per outlet and the reasonable provision of facilities within each centre compared with the national average shown in the centre health checks.

5.45 Table 10 in Appendix 5 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new development. In 2026 there is a small expenditure surplus of +£4 million. Continued population and expenditure growth creates an expenditure surplus of £36.93 million in 2041. Floorspace capacity projections are shown in Table 11, Appendix 5 and summarised in Table 5.9 below.

Table 5.9 Food and beverage floorspace capacity (sq.m gross) - cumulative

Zone	2026	2031	2036	2041
1 - Lutterworth	30	130	220	320
1 - other	40	130	240	340
2 - Broughton Astley	40	130	230	330
2 - Fleckney	0	0	0	10
2 - other	30	100	170	240
3 - Great Glen	10	30	50	80
3 - Kibworth	40	140	250	360
3 - other	90	320	560	800
4 - Market Harborough	390	1,360	2,360	3,390
Total	670	2,340	4,080	5,870

Source: Table 10 in Appendix 5.

Qualitative need

5.46 Collectively the town, district and local centres in the District have 94 food/beverage outlets. Collectively these centres provide a good range and choice of outlets. Market Harborough town centre has the strongest provision of outlets serving the evening economy. Overall, the accessibility for residents in the District to a range and choice of

food/beverage outlets is good. The reasonable provision of food/beverage facilities outlined in the centre health checks suggests there are no obvious areas of deficiency.

Operator space requirements

5-47 The Requirements List publishes potential space requirements for multiple retail and food/beverage operators. The current (September 2024) list of operators whose published information suggest they may have space requirements in Market Harborough are shown in Tables 5.10 to 5.11. There were no listed requirements for Lutterworth, Broughton Astley or local centres in the District.

Table 5.10 Comparison goods retail operator space requirements in Harborough

Operator	Floorspace in sq.m (min/max)
Age UK – charity shop	130 – 450
Edinburgh Wollen Mill – high street fashion	170 – 280
Fone World – mobile phones	30 – 90
Hobbs – women’s clothing	230 – 280
Moda in Pelle – women’s clothes	130 – 170
Seasalt Cornwall - clothes	110 – 170
Sosandar – fashion	90 – 190
The Range – home, garden and leisure	1,850 – 7,400
Whistles – women’s clothes	140 – 190
Woodgreen Pets – charity shop	140 – 190

Source: The Requirements List (September 2024)

Table 5.11 Food/Beverage operator space requirements in Harborough

Operator	Floorspace in sq.m (min/max)
Amber Taverns	190
Bewitched Coffee	90 - 170
KFC – fast food restaurant/takeaway	110 – 230
Pizza Triangle – restaurant	70 – 180
Sommar Tap Brewing Company	90 – 150

Source: The Requirements List (September 2024)

5-48 In total, there are 15 retail and food/beverage operators listed as having potential space requirements in Market Harborough with a potential total floorspace requirement of at least 3,550 sq.m, as follows:

- Comparison goods retailers 10 (about 3,000 sq.m gross)
- Food/beverage operators 5 (about 550 sq.m gross).

5-49 Some of these listed requirements are likely to be generic interest in centres of a similar size across the region rather than specifically in Market Harborough, therefore the total number of requirements and amount of floorspace outlined below should be treated with caution.

6.0 Leisure, entertainment and cultural uses

Introduction

- 6.1 This section assesses the need for other main town centre uses including commercial leisure, entertainment and cultural uses i.e. cinema/multiplex, tenpin bowling, bingo, theatres, nightclubs and private health and fitness clubs. Main town centre uses, as defined within the NPPF glossary, exclude less intensive sports and recreation uses such as swimming pools, sports halls and sports pitches, and therefore the need for these uses has not been assessed in this study.
- 6.2 Residents in the District have a reasonable range of commercial leisure and entertainment uses within the authority area and within neighbouring authorities. Public transport access to facilities within Leicester, Kettering and Corby also provides additional opportunities for leisure, entertainment and cultural trips.

Leisure, entertainment and cultural expenditure

- 6.3 Experian's projections and local expenditure data for the household study area indicates the resident population generates £43.71 million in 2024 (an average of about £337 person) on selected cultural, recreational and sporting services, including:
- cinema admissions £1.94 million;
 - live entertainment i.e. theatre/concerts/shows £5.68 million;
 - museums, theme parks, houses and gardens £5.40 million;
 - admissions to clubs, dances, discos, bingo £3.06 million;
 - other miscellaneous entertainment £7.97 million;
 - subscriptions to sports and social clubs £9.21 million; and
 - leisure class fees £10.45 million.
- 6.4 Leisure, entertainment and cultural expenditure has been projected to 2031, 2036 and 2041 adopting Experian's recommended leisure expenditure growth rates (Retail Planning Briefing Note 21 – February 2024). Taking population growth into account leisure expenditure is projected to increase by 30.8% from £43.71 million in 2024 to £57.16 million in 2041.
- 6.5 Not all leisure/cultural expenditure from study area residents is spent in Harborough. The household survey results have been adopted to estimate the household participation rates and the retention of leisure trips within the study area, as shown in Table 6.1. Around 6% of households do not participate in any of the nine leisure activities explored by the household survey. The participation and retention rates vary significantly for each leisure activity. Many residents travel outside the study area e.g. to Rugby, Northampton, Leicester, Kettering, and Corby for many leisure activities. The retention rate is highest for trips to indoor/soft play (51.2%) and health/fitness facilities (47.3%) but very low for tenpin bowling (0.8%), trampoline parks (1.1%), cinemas (1.6%), and nightclubs/live music venues (3.0%). These results suggest households are prepared to travel further for these activities, as well as bingo, theatres, and museums/art galleries.

6.6 Leicester is the most significant out-of-district location for leisure activities, attracting 35.6% of assessed households to its cinemas, and taking significant portions of visits to theatres (37.6%); nightclubs/live music venues (35.2%); bingo (38.6%); tenpin bowling/gaming (39.5%); trampoline parks (30.8%) and museums/art galleries (28.8%). It was not such a significant destination for gyms/health (3.3%) or indoor/soft play (8.4%).

Table 6.1 Leisure, entertainment and cultural participation and trip retention (% of households in the study area)

Activity	% study area households participating	% trips retained in Harborough District
Cinema	50.5	2.3
Theatre	48.5	12.0
Nightclubs / live music venues	22.0	3.0
Bingo	5.8	4.9
Gyms / health and fitness club	30.2	47.3
Tenpin bowling / gaming	21.3	0.8
Indoor / soft play	10.2	51.2
Trampoline parks	10.0	1.1
Museums / art galleries	40.0	14.7

Source: NEMS household survey results April 2024

6.7 The household survey results and Experian’s expenditure figures suggest facilities in Harborough District retain less than 30% of leisure, entertainment and cultural expenditure within the study area, which is about £13.1 million in 2024. Based on Lichfields’ experience this level of retention is not unusually low for a rural authority that lies within the catchment area of a larger regional centre(s). This retained leisure expenditure is projected to increase to £14.8 million in 2031; £16.0 million in 2036 and £17.1 million in 2041.

6.8 Based on Lichfields’ experience, leisure floorspace normally trades on average around £2,500 per sq.m gross, which is projected to increase to £2,568 per sq.m gross in 2031; £2,594 per sq.m in 2036 and then to £2,620 per sq.m in 2041, based on Experian’s projected growth in leisure sales densities.

6.9 If leisure/cultural expenditure retained by the District increased by £1.7 million by 2031 and then by £2.8 million in 2036 and £4 million in 2041, as indicated above, then this additional expenditure could support about 700 sq.m gross of new commercial leisure and cultural floorspace by 2031, increasing to about 1,100 sq.m gross by 2036 and then 1,500 sq.m gross by 2041.

6.10 This analysis provides a broad brush global floorspace capacity and assumes Harborough District will continue to retain, as a minimum, a low (30%) proportion of leisure expenditure within the study area. A more detailed sector by sector assessment is set out in the remainder of this section.

Cinemas

6.11 Cinema admissions in the UK reached a peak of 1.6 billion trips in 1946, but the number of trips declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s dropping to only 54 million trips in 1984 but increased steadily after 1984 up to

2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute). Cinema trips did not increase significantly between 2002 and 2019, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average visitation rate was about 2.6 trips per person per annum, before the Covid crisis. The number of trips during the Covid-19 crisis reduced significantly. The latest 2023 figures indicate 123.6 million cinema trips were made in the UK (about 1.8 trips per person), still 30% below pre-Covid levels (176 million).

- 6.12 The cinema assessment for Harborough assumes trip levels comparable with the UK average at both post and pre-Covid levels, i.e. an average of between 1.8 and 2.6 trips per person per annum.
- 6.13 The UK Film Distributors' Association identifies 977 cinema facilities with 4,578 screens in the UK in 2023. Lichfields' national CINESCOPE model assesses the provision of cinema screens against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average (based on pre-Covid trips rates) was about 38,000 cinema trips per annum for each cinema screen.
- 6.14 The study area population is 129,633 in 2024, which based on the national averages above, would generate between 233,000 to 337,000 cinema trips. These trips can theoretically support between six and nine cinema screens. However, these cinema trips are not retained in the District, with cinemas in surrounding areas attracting most cinema trips.
- 6.15 Harborough Cinema within Harborough Theatre in Market Harborough is the only facility in the District. It is a small one screen (117 seats) cinema with infrequent screenings. The household survey results suggest Market Harborough attracts only a small number of cinema trips (2.3% of households in the study area) compared to facilities outside of Harborough District. This 2.3% market share equates to only 5,400 to 7,800 cinema trips. There is significant cinema provision in Leicester, as well as in Kettering, Corby and Northampton. Cinema destinations attracting significant visits according to the household survey are set out in Table 6.2.

Table 6.2 Cinemas provision in surrounding authorities

Cinema	Capacity	% study area market share
Odeon, Kettering	8 screens (1,321 seats)	16.8
Savoy, Corby	6 screens (900 seats)	15.7
Vue, Braunstone, Leicester	9 screens (2,246 seats)	13.1
Showcase, Highcross, Leicester	12 screens (3,000 seats)	9.7
Odeon Luxe, Leicester	12 screens (892 seats)	9.5
Cineworld, Rugby	9 screens (1,617 seats)	4.7
Cineworld, Rushden Lakes	14 screens (2,470 seats)	3.4
Vue, Northampton	10 screens (2,529 seats)	2.8
Showcase, Coventry	14 screens (3,413 seats)	2.1
Phoenix Square, Leicester	5 screens (485 seats)	1.8
Cineworld, Hinckley	5 screens (787 seats)	1.7
Cineworld, Northampton	9 screens (2,028 seats)	1.3

Source: Uk.cinemas.uk; NEMS household survey results April 2024.

- 6.16 If Market Harborough can increase its market share of cinema trips in the future to 30% of trips generated by the study area population (from 2.3% in 2024) there could be potential for additional provision.
- 6.17 Population within the study area is projected to increase from 129,633 to 145,917 by 2041. The population estimate at 2041 is projected to generate between 233,000 to 379,000 cinema trips, based on the national averages above (1.8 to 2.6 trips per person per annum). If Market Harborough retained 30% of these trips (70,000 to 114,000) then the theoretical capacity is two to three screens. These additional trips (higher figure) could in theory support two more cinema screens over and above the existing facility, which could support a small boutique cinema. However, existing cinema provision within the surrounding area may limit operator demand for a new facility in the study area. Furthermore, the longer-term impact of Covid-19 and growth in home viewing on the number of cinema trips may reduce this theoretical capacity if the average visitation rate does not return to the pre-Covid UK average of 2.6 trips per person. Alternatively, future demand could be met by expanding the offer at Harborough Cinema, e.g. increasing the frequency of showings or upgrading to a larger venue.

Theatres, nightclubs, live music and other cultural activities

- 6.18 The household survey results indicate 48.5% of respondents in the study area visit theatres. Nearly 40% visit museums/art galleries and about 22% visit nightclubs/live music venues.
- 6.19 The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (over 200) pre-Covid presented nearly 63,000 performances attracting over 34.35 million ticketed visits, generating ticket revenue of £1.28 billion in 2018. The average ticket revenue per venue was £5.7 million. The UK average attendance per performance was 545.
- 6.20 Experian's local expenditure data indicates the Harborough study area generates £5.68 million on live theatre, concerts and shows in 2024, which is projected to increase to £7.42 million in 2041. Based on the average ticket revenue per venue (£5.7 million) the Harborough study area population currently generates theoretical demand for less than one venue. This theoretical demand could increase to support up to two venues by 2041. However, the household survey results suggest the District retains less than 12% of theatre trips. Leicester is a popular destination, with various venues attracting 37.6% of Harborough's households, followed by central London/the West End (23.7%).
- 6.21 Despite the low study area generated expenditure and low market share, the District has two full time theatre venues:
- Harborough Theatre in Market Harborough (attracting 10.14% of trips)
 - Kilworth House Theatre, North Kilworth (attracting 1.6% of trips)
- 6.22 The Nevill Holt Opera also hosts an annual month-long festival. This existing provision is significantly above the theoretical demand generated by the study area, based on the current market share of less than 12%, which suggests there is limited potential for new theatre facilities.

- 6.23 The nightclub sector has struggled in recent years and has been significantly affected by the Covid pandemic. Even before Covid-19, IBISWorld (providers of global industry research) suggested these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.
- 6.24 The household survey results suggest about 22% of households visit nightclubs/music venues and of these participating households around 3% are retained by facilities in the District.
- 6.25 Experian suggests leisure expenditure on admissions to clubs, dances, discos etc is only £3.06 million in 2024 within the Harborough study area. This relatively low level of expenditure and good access to nightclub/live music venues in Leicester (attracting 35.2% of trips) are likely to limit demand for additional facilities in the District. Significant numbers are also attracted to Northampton (8.2%); Peterborough (3.5%); and as far as Birmingham (12%).
- 6.26 Experian's local expenditure data indicates the Harborough study area generates £5.4 million on museums, theme parks, houses and gardens in 2024, which is projected to increase to £7.1 million in 2043, an additional £1.7 million.
- 6.27 The household survey results suggest around 40% of households visit museums/ art galleries, and 14.7% of visits by these participating households are retained in Harborough, i.e. visiting the recently opened Lutterworth and District Museum (3.7%) or Harborough Museum (10.9%). Leicester is the most significant out-of-district destination, attracting 28.8% of visitors to facilities such as Leicester Museum and Art Gallery (10%); The Newarke Houses Museum (8%); and the National Space Centre (2.4%). 22.7% of trips generated were to central London.
- 6.28 The analysis above suggests there is no clear qualitative or quantitative need for additional theatre, music/nightclub or cultural provision. However, there may be potential to increase the District's market share and attract more demand from tourist visitors if provision is improved.

Health and fitness clubs

- 6.29 The 2019 State of the UK Fitness Industry Report revealed that the health and fitness industry was continuing to grow pre-Covid. The latest 2022 report suggests the market value is now around 2018 levels. In 2019 there were more than 10.4 million fitness members in the UK and the industry was worth £5 billion, with a participation rate of 15.6%. The number of members dropped to 9.9 million in 2022, with a participation rate of 14.6% compared with 15.6% in 2019. The number of clubs reduced by 176. The household survey results indicate 30.2% of households visit health and fitness gyms, which is higher than the national average participation rate of just over 15%.
- 6.30 The Sport England/Active Places data indicates that there are only 11 registered health and fitness facilities in the District, with 441 fitness stations, as shown in Table 5.2.

Table 6.3 Health and fitness facilities in Harborough District

Facility	Number of fitness stations	Type of access
Broughton Astley Leisure Centre	63	Registered Membership use
Bruno's Fitness Centre	32	Registered Membership use
Gym 11	43	Registered Membership use
Harborough Leisure Centre	70	Pay and Play
Leicester Grammar School	20	Pay and Play
Lutterworth College	12	Private Use
Lutterworth Sports Centre	72	Pay and Play
Robert Smyth Academy	13	Private Use
Snap Fitness, Market Harborough	70	Registered Membership use
Ullesthorpe Court Golf Club	31	Registered Membership use
Welland Park Academy	15	Private Use
Total	441	

Source: Sport England March 2024.

- 6.31 The current population in the Harborough study area is 129,633. The household survey results suggest the District retains about 47.3% of gym trips in the study area, equating to a catchment population of about 61,300 in 2024. Based on this current estimated catchment population (61,300) there is an average of 7.2 fitness stations per 1,000 people.
- 6.32 Experian's local expenditure data indicates the Harborough study area generates £19.66 million on subscriptions to sports/social clubs and leisure class fees, which is projected to increase to £25.7 million in 2041. Facilities in Harbough District would attract about £9.3 million, based on the 47.3% market share, which equates to about £21,000 per fitness station. Expenditure growth between 2024 to 2041, based on a constant market share of 47.3%, generates an additional £2.9 million, which could support 138 additional fitness station (based on one fitness station per £21,000). Based on this approach there could be scope for at least two additional medium sized health and fitness facility in the District.
- 6.33 An alternative approach has been adopted based on the regional average. Within the East Midlands region there are 603 Sport England registered health and fitness facilities with 35,814 fitness stations (average of 59.4 stations per facility). This existing provision equates to about 7.1 registered fitness stations per 1,000 people in the East Midlands region (ONS 2018 based projections), which is slightly lower than the 7.2 fitness stations per 1,000 people in Harborough District shown above. These figures suggest there is a reasonable balance between the supply of fitness stations and demand in the Harborough study area.
- 6.34 Demand for additional facilities within Harborough should arise from future population growth. Population within the study area is projected to increase to 145,917 by 2041, an additional 16,284 people. Based on the regional average of 7.1 fitness stations per 1,000 people, this population growth could support about 116 fitness stations, 47.3% of which could be provided in the District based on the current market share. Based on this approach there could be scope for at least one additional medium sized health and fitness facility in the District.

Tenpin bowling and other indoor leisure innovations

- 6.35 Repurposed space in town centres has provided new opportunities for new leisure innovations. Vacated premises have been reconfigured and reused for trampolines, climbing, indoor golf, escape rooms etc. These and other innovations are likely to continue in the future. Many of these new leisure uses do not require planning permission following the creation of Class E use in 2020 and associated changes to PD rights. These changes will allow landlords to adopt a flexible approach to respond to arising opportunities.
- 6.36 The household survey results indicate 21.3% of households visit ten-pin bowling/ gaming facilities, but less than 1% of these trips are within the District, owing to the absence of these types of facilities in the District.
- 6.37 Other tenpin bowling destination mentioned by household survey respondents were:
- Hollywood Bowl, Leicester (32%);
 - Thunderbowl, Kettering (25.9%);
 - Tenpin, Northampton (15%); and
 - Lane 7, Leicester (3.3%).
- 6.38 The Harborough study area's future 2041 population (145,917) can theoretically support 12 lanes, based on the national average of one lane per 12,000 people. If the District could retain, say 50% of trips generated by the study area population, then about six lanes could be supported. This small number of additional lanes could be supported within a mixed activity leisure facility.
- 6.39 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce in 2014.
- 6.40 Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts for all ages and abilities, as well as an arcade and party rooms.
- 6.41 The household survey results indicate 10% of respondents in the study area visit trampoline centres and 10.2% visit indoor soft play facilities. Trampoline destinations mentioned by households participating in this activity were as follows:
- Gravity Active, Corby (28.4%);
 - Boost Trampoline Park, Leicester / Leicester City Centre (21.5% / 9.3%);
 - Flip Out, Rushden (20.1%);
 - Leicester City Centre (9.3%);
 - 360 Play, Braunstone, Leicester (4.0%); and
 - Red Kangaroo Trampoline Park, Coventry (3.2%).

- 6.42 This existing provision and the low participation rate suggest an additional large trampoline facility in Harborough District may not be viable.
- 6.43 Household participation in soft play centres was mainly in the District, with 51.2% using facilities within Harborough. There are two facilities in the District, Mini Mischiefs in Market Harborough and Windmill Adventure Play in Kibworth Harcourt, with the latter only attracting 0.6% of participating households. The main indoor soft play destinations mentioned by participating households were as follows:
- Mini Mischiefs, Market Harborough / Market Harborough Town Centre (38.7% / 12%);
 - Rugby Town Centre (5.3%);
 - Enderby Leisure Centre, Enderby (4.7%);
 - Parklands Play World, Oadby (4.5%);
 - Gravity Active, Corby (4.3%);
 - Northampton Town Centre (4.3%);
 - 360 Play, Braunstone, Leicester (3.9%);
 - Kettering Town Centre (3.1%);
 - Junction One Retail Park, Rugby (3.1%); and
 - Bermuda Adventure Soft Play World, Nuneaton (3.1%)
- 6.44 Overall, there may be potential scope for further provision of these types of leisure facilities in the District, but these innovations are still evolving and its potential for continued growth is unclear. Participation levels based on the household survey are relatively low in comparison to other leisure activities. The strategy for the District should be flexible to respond to any emerging demand from leisure operators.

Bingo, games of chance and gambling

- 6.45 Gala (now Buzz Bingo) and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.
- 6.46 The Gambling Commission indicates there are 646 bingo facilities in Great Britain (2020) and 156 casinos. This equates to approximately one bingo facility per 75,000 adults, and one casino per 330,000 adults.
- 6.47 The household survey results indicate 5.8% of respondents in the study area visit bingo facilities, just above the UK average participation rates of around 5%. Less than 5% of trips generated are retained in the District, and as there are no permanent facilities within Harborough, participation is likely events-based. The main Bingo destinations mentioned by participating households were as follows:
- Mecca Bingo, Leicester (28.1%);

- Corby Town Centre (16.3%);
- Castle Bingo, Corby (12.6%);
- Desborough Town Centre (12.4%);
- Leicester City Centre (10.6%); and
- Rugby Town Centre (5.5%).

6.48 The adult population in the Harborough study area (about 105,000 in 2024) is theoretically capable of supporting less than two bingo facilities and much less than one casino, based on the UK averages. Considering the District's relatively high participation rate (5.8%), there may be scope to open a permanent bingo facility, subject to operator demand. However, the continued growth in online bingo and gambling and provision in surrounding authority areas are likely to restrict operator demand in the District.

Conclusions on commercial leisure and other town uses

6.49 The leisure, entertainment and cultural sectors are fragmented and innovative. There are many activities that could be promoted to capture more expenditure within the district e.g. live music, nightclubs, and bingo. The analysis suggests the scope for some traditional leisure activities often found in town centres may be limited e.g. cinemas and theatres, but new emerging leisure activities such as escape rooms and virtual golf centres should provide more potential. The representation of these emerging uses is likely to increase. Given the fragmented nature of these sectors it is difficult to precisely quantify the potential demand for these uses over the next 15 years.

6.50 In global terms future expenditure growth could support new commercial leisure and cultural floorspace (cumulative) in the District of:

- about 700 sq.m by 2031;
- about 1,100 sq.m by 2036; or
- about 1,500 sq.m by 2041.

6.51 This additional floorspace could include:

- a small boutique cinema (one or two screens);
- one or two medium sized health and fitness facilities (between 70 to 140 fitness stations);
- a small tenpin bowling facility within a multi-use leisure facility;
- a bingo hall (subject to operator demand and trends in on-line gambling); and
- new leisure innovations e.g. soft play, indoor climbing, escape rooms, virtual sport activities; and
- small scale tourist attractions/cultural facilities.

6.52 The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities. The opportunities to reoccupy vacated retail space should be considered.

7.0 Accommodating growth and change

National guidance

- 7.1 For planning policies, local authorities are required to support the role of town centres and the three main areas policies should focus on:
- defining a network and hierarchy of centres, allowing them to grow and diversify;
 - defining the extent of centre boundaries and primary shopping areas, making clear the uses permitted in these locations; and
 - allocating a range of suitable sites to meet the scale and type of development needed for at least ten years ahead, sites should be allocated consistent with the sequential approach i.e. town centre, then edge-of-centre followed by accessible out-of-centre sites.
- 7.2 The NPPF acknowledges the rapid changes that are affecting town centres and diversification is key to their long-term vitality and viability. Accordingly, planning policies should clarify the range of uses permitted, as part of a positive strategy for the future of each centre.
- 7.3 The NPPF's presumption in favour of sustainable development remains. For plan-making this means that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. It is widely accepted that very long-term projections have inherent uncertainties. In response to these uncertainties, local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses over a minimum ten-year period reflects the complexities in bringing forward town centre development sites. In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.
- 7.4 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will need to be assessed against the sequential and impact tests.
- 7.5 The sequential test in the NPPF indicates main town centre uses should locate in town centres, then in edge-of-centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out-of-centre sites be considered (para. 91). When considering edge-of-centre and out-of-centre proposals, preference should be given to accessible sites that are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge-of-centre sites are fully explored (para. 92).
- 7.6 The NPPF states that local planning authorities should require an impact assessment for applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq.m (para. 94). The locally set thresholds in Harborough is addressed later in this section.

Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact, it should be refused (para. 95).

- 7.7 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. On-line shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centres has become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.
- 7.8 As set out in Section 2, the Use Classes Order (UCO) was significantly amended in September 2020 and changes to permitted development rights were introduced in August 2021. These changes will have significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses. The implications of these changes are addressed later.
- 7.9 The expenditure projections in this study exclude home shopping made through non-retail businesses, because special forms of trading (sales via the internet, mail order, stalls and markets) is subtracted from the expenditure projections. The assessment adopts Experian's latest information and projections and assumes that special forms of trading will increase in the future, including the growth of internet shopping.

Floorspace capacity projections

- 7.10 The Harborough Local Plan 2011 to 2031 Policy RT1 (Provision of new retail uses) sets out the minimum retail floorspace capacity for comparison and convenience goods retail during the plan period to 2031. In total 4,300 sq.m gross of convenience goods retail floorspace and a minimum 10,100 sq.m gross of comparison goods floorspace was identified as needed. These floorspace projections now need to be updated and rolled forward.
- 7.11 The floorspace projections in Policy RT1 and Table B.18 in the Local Plan were based on the Harborough Retail Study Update 2017. The Local Plan did not set out food/beverage floorspace projections in addition to retail. The adopted Local Plan sets out the following settlement-specific requirements for the period to 2031:
- Market Harborough: 3,100 sq.m (gross) convenience and 8,000 sq.m (gross) comparison retail;
 - Lutterworth: 1,000 sq.m (gross) convenience and 1,500 sq.m (gross) comparison retail; and
 - Broughton Astley: 200 sq.m (gross) convenience and 200 sq.m (gross) comparison retail.
- 7.12 The updated assessment of the potential for new retail, food/beverage floorspace in this report suggests there is a more modest need for new development in the District. Tables 7.1, 7.2 and 7.3 below summarise the new floorspace requirements in the District up to 2031, 2036 and 2041 (cumulative).
- 7.13 These projections assume facilities in Harborough District will maintain their market share of expenditure in the future. This approach recognises that additional development within the District could help to increase the area's market share, but this increase will be counter-

balanced by development within competing centres. The household survey results indicate the District retains a reasonable level of retail and food/beverage expenditure and a significant increase in market shares is unrealistic and unnecessary. Conversely a significant reduction in market share could undermine the vitality and viability of town centres. A balanced and sustainable approach has been adopted.

- 7.14 Table 7.2 indicates there is a combined projected requirement for 7,240 sq.m gross of retail and food/beverage floorspace in 2036. The combined floorspace requirement increases to 11,300 sq.m gross in 2041. The availability of existing vacant floorspace, commitments, proposals and development allocations to accommodate these floorspace requirement needs to be considered, particularly up to 2036.

Table 7.1 Retail and food/beverage floorspace projections up to 2031 (sq.m gross) – cumulative

Zone	Convenience goods retail	Comparison goods retail	Food/ beverage	Total
Market Harborough	-170	1,300	1,360	2,490
Lutterworth	0	150	130	280
Broughton Astley	10	10	130	150
Kibworth	50	30	140	220
Other	-30	40	580	590
Total	-140	1,530	2,340	3,730

Table 7.2 Retail and food/beverage floorspace projections up to 2036 (sq.m gross) – cumulative

Zone	Convenience goods retail	Comparison goods retail	Food/ beverage	Total
Market Harborough	290	2,220	2,360	4,870
Lutterworth	80	270	220	570
Broughton Astley	40	20	230	290
Kibworth	100	50	250	400
Other	20	70	1,020	1,110
Total	530	2,630	4,080	7,240

Table 7.3 Retail and food/beverage floorspace projections up to 2041 (sq.m gross) – cumulative

Zone	Convenience goods retail	Comparison goods retail	Food/ beverage	Total
Market Harborough	810	3,450	3,390	7,650
Lutterworth	180	460	320	960
Broughton Astley	90	30	330	450
Kibworth	150	70	360	580
Other	70	120	1,470	1,660
Total	1,300	4,130	5,870	11,300

Source: Tables 11 and 12 in Appendix 3, 4 and 5.

- 7.15 Growth in the food/beverage and commercial leisure, entertainment and culture sectors provide an opportunity to enhance the evening and night-time economy in centres,

including the repurposing of vacant retail floorspace. The new Local Plan should recognise and foster this potential, albeit recognising potential negative environmental and amenity effects and considering appropriate management strategies and mitigation measures.

7.16 Development plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through the expansion of centres. The NPPF indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres. To accommodate growth, local planning authorities should keep town centre boundaries under review.

7.17 The floorspace projections should be viewed as broad guidance and a starting point for the review of site-specific allocations and development management policies. The projections in Tables 7.1 to 7.3 do not take account of all extant planning permissions or pipeline proposals or the reoccupation of vacant floorspace.

Vacant shop premises

7.18 The need assessment in this report assumes that existing retail and service floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities, vacant shop premises could help to accommodate future growth. The existing stock of premises should have a key role to play in accommodating any projected growth, particularly in the short to medium term.

7.19 In May 2024 there were 36 vacant shop units in the town, district and local centres, an average vacancy rate of 7.6%, which is below the pre-Covid UK average (12.4%) and significantly below the current UK average (14.5%). Vacant floorspace totalled about 5,300 sq.m gross, about two thirds of this is in Market Harborough town centre.

7.20 The low floorspace capacity projections up to 2036 suggest the priority in the short-term will be the reoccupation of vacant shop units. The floorspace projections suggest there is a need to retain the existing stock of shop premises within centres to ensure future growth can be accommodate later in the plan period.

7.21 As a strategic objective, it is reasonable to assume the shop vacancy rate could reduce to about 5% across the District's centres. Based on Lichfields' experience 5% is a reasonable minimum vacancy rate, allowing for the natural churn of occupiers in successful town centres. This reduction in the shop vacancy rate could theoretically accommodate at least 1,500 sq.m gross of new uses in Market Harborough, Lutterworth, Broughton Astley and local centres, which is less than the projected combined retail and food/beverage floorspace under-supply up to 2031 (3,730 sq.m gross). Based on the 5% vacancy rate target, reoccupied vacant floorspace could be distributed as follows:

- Market Harborough town centre 800 sq.m gross
- Lutterworth town centre 400 sq.m gross
- Broughton Astley district centre 300 sq.m gross
- Local centres 100 sq.m gross

7.22 The convenience goods retail capacity projections assume the proposed relocation of the Aldi in Market Harborough to a larger store (see below regarding commitments and proposals) will be implemented. However, the vacated Aldi store (about 1,200 sq.m gross)

at Springfield Street should be suitable for reoccupation for an alternative retail or leisure use, which suggests reoccupied floorspace in Market Harborough could be about 2,000 sq.m gross rather than 800 sq.m gross, based on the 5% vacancy rate target. In total vacant units across the District and the vacated Aldi unit could accommodate 2,800 sq.m gross.

7.23 The longer-term floorspace projections to 2036 and 2041 suggest there will be a need for further retail and food/beverage floorspace, over and above the reoccupation of vacant floorspace. Allowing for reoccupied vacant floorspace and the vacated Aldi store, as described above, about 4,400 sq.m gross of additional floorspace could be required in 2036, increasing to 8,500 sq.m gross in 2041.

Local Plan allocations, commitments and proposals

7.24 As indicated above, the convenience goods retail capacity projections assume the relocation of the Aldi store in Market Harborough. The projections also take account of the enlarged replacement Co-op store proposed in Great Glen. Other commitments and proposals that could absorb further retail or food/beverage floorspace capacity growth are as follows:

- 18/01432/FULL – building A&D Valley Way, Market Harborough totalling 1,400 sq.m gross of flexible retail and employment space;
- 19/00250/OUT – land east of Lutterworth including neighbourhood centre totalling 1,500 sq.m gross;
- 21/01519/FUL – land west of Leicester Road, Market Harborough including local centre totalling 590 sq.m gross;
- 22/00302/REM - land south of Kettering Road, Market Harborough including local centre with 3 units totalling 630 sq.m gross (decision pending);
- 22/02002/OUT – land east of Bittesby Way, Magna Park – roadside amenity with retail area of 125 sq.m gross;
- 22/01318/FUL – Coventry Road, Lutterworth – drive through McDonalds and coffee shop totalling 580 sq.m gross;
- 22/01776/FUL – Wistow Home Farm, Wistow -conversion to flexible Class E use (retail or financial/professional use) up to 173 sq.m gross;
- 22/01847/FUL – Tugby Orchards, Tugby – cycle retail unit – 432 sq.m gross;
- 23/01748/FUL – Car Park High Street, Fleckney – two retail units totalling 286 sq.m (resubmission); and
- 24/00120/CMA – employment development plus two drive thru units totalling 470 sq.m gross.

7.25 Collectively, these commitments/proposals, as a maximum, could provide about 6,200 sq.m gross of retail and food/beverage floorspace, but the exact split between the types of uses is unknown at this stage. The reoccupation of vacant units (2,800 sq.m gross) and the implementation commitments/proposals (6,200 sq.m gross), as described above, could accommodate all the projected floorspace capacity up to 2036 (7,240 sq.m gross) or nearly 80% of the projection up to 2041 (11,300 sq.m gross).

- 7.26 Based on these assumptions, the residual floorspace capacity in 2036 and 2041 is calculated in Tables 7.4 and 7.5. The long-term residual requirement in 2041, over and above the reoccupation of vacant units and the implementation of commitments/proposals, is only 2,300 sq.m gross. As assessed in Section 6, there could be an additional requirement for about 1,500 sq.m gross of leisure use in the District in 2041, which is not included in Tables 7.4 and 7.5.

Table 7.4 Residual retail and food/beverage floorspace capacity at 2036 (sq.m gross)

	Global floorspace capacity in 2036	Reoccupied vacant floorspace	Commitments / proposals	Residual requirement
Market Harborough	4,870	-2,000	-2,600	270
Lutterworth	570	-400	-2,100	-1,930
Broughton Astley	290	-300	-	-10
Kibworth	400	-	-	400
Other	1,110	-100	-1,500	-490
Total	7,240	-2,800	-6,200	-1,760

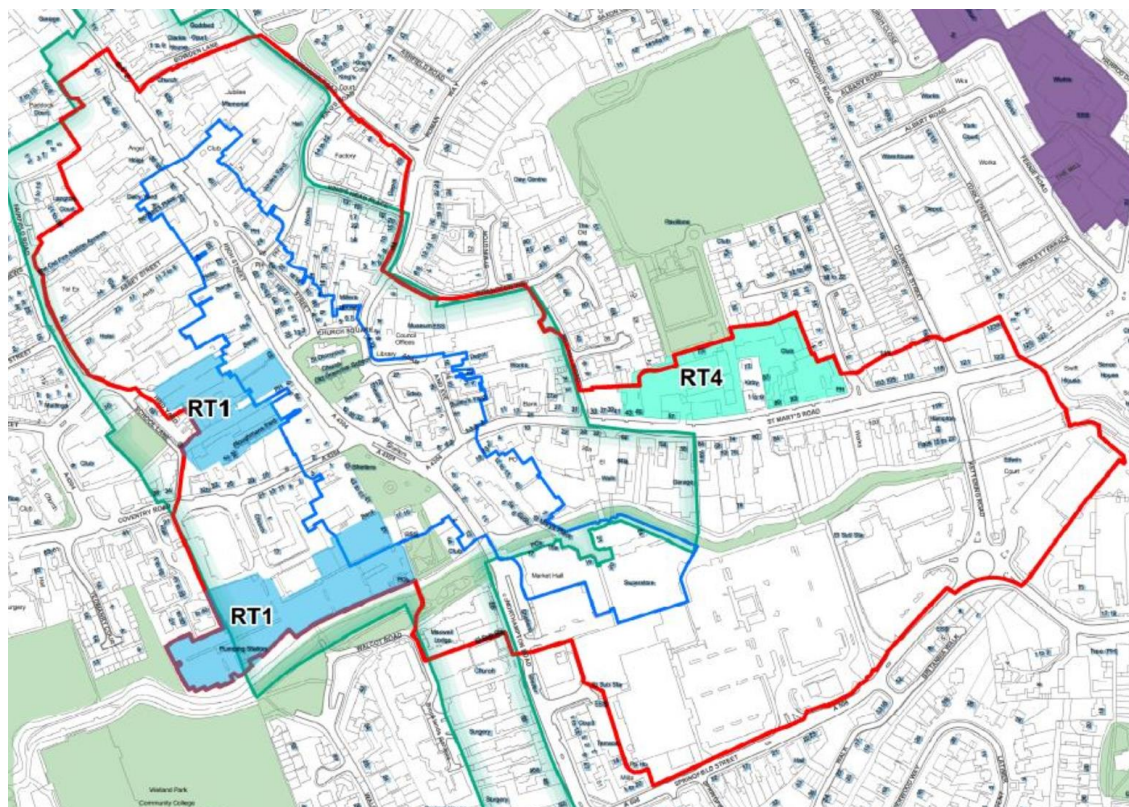
Table 7.5 Residual retail and food/beverage floorspace capacity at 2041 (sq.m gross)

	Global floorspace capacity in 2041	Reoccupied vacant floorspace	Commitments / proposals	Residual requirement
Market Harborough	7,650	-2,000	-2,600	3,050
Lutterworth	960	-400	-2,100	-1,540
Broughton Astley	450	-300	-	150
Kibworth	580	-	-	580
Other	1,660	-100	-1,500	60
Total	11,300	-2,800	-6,200	2,300

- 7.27 The negative residual floorspace estimates in some locations suggest a theoretical over-supply of floorspace following the implementation of commitments/proposals and the reoccupation of vacant floorspace. The floorspace capacity projections assume constant market shares, therefore the negative residual floorspace estimates do not necessarily imply existing floorspace will be lost. Additional growth could be retained in these locations and/or the positive residual floorspace requirement from other areas could be redistributed where catchment areas overlap e.g. Lutterworth and Broughton Astley.
- 7.28 Adopted Local Plan Policies RT1 and RT4 of the adopted Local Plan allocated three potential mixed-use development sites in Market Harborough town centre that were expected to accommodate at least 6,500 sq.m gross of additional retail, leisure and town centre uses floorspace, as shown on the Policies Map extract (Figure 7.6).
- 7.29 Policy RT1 suggested a net increase of at least 1,500 sq.m gross of retail floorspace was envisaged at The Commons Car Park and a further net increase of at least 2,000 sq.m gross was envisaged at land off the High Street. Policy RT4 relates to Tourism and Leisure,

including an allocation at land off St Mary’s Road – for leisure, entertainment, and tourism uses, which suggests a mixed-use development could provide at least 3,000 sq.m gross including some or all the following uses: food/beverage, C1 hotel, D2 assembly and leisure. These development allocations have been assessed in Appendix 7.

Figure 7.6 Market Harborough town centre Policies Map extract



Source: Harborough Local Plan 2011-2031, Market Harborough Policies Map

- 7.30 The analysis set out in Appendix 7 suggests the Policy RT1 allocation at land off the High Street has been largely developed for residential use and the area now has limited potential to accommodate a net increase in retail and main town centre uses floorspace.
- 7.31 The Commons Car Park site remains undeveloped, but the prospects for an extension to either the Tesco or Co-op stores appear unlikely. Other development constraints will reduce the developable area, but the southwest area of the surface car park could have potential to accommodate about 1,000 sq.m gross of retail, food/beverage or leisure use.
- 7.32 The Policy RT4 land off St Mary’s Road allocation remains undeveloped but appears to be in multiple ownerships and premises are predominantly occupied. Comprehensive redevelopment of this area to provide at least 3,000 sq.m gross of food/beverage or leisure use would require land assembly and appears to be a long-term opportunity (after 2036). Smaller scale development or changes of use could occur in this area.
- 7.33 The Commons Car Park allocation could accommodate some of the residual retail and food/beverage floorspace capacity in Market Harborough up to 2041 (3,050 sq.m gross). The St Mary’s Road allocation could accommodate any further long-term need for food/beverage and leisure uses if required. New local shops in strategic housing sites could

also accommodate some of the floorspace capacity in Market Harborough and other parts of the District.

Strategic housing sites

- 7.34 A significant element of the floorspace capacity projections shown above relates to population growth in the District. Large housing allocations may require the provision of new local shops and services to ensure new residents have access to day-to-day facilities within walking distance. These facilities could include small convenience stores, pharmacists, food/beverage outlets and other non-retail services.
- 7.35 Based on the capacity assessment expenditure projections, a strategic housing site of between 400 to 500 homes (resident population of 900 to 1,100 people) could support a new local or neighbourhood centre of up to 500 sq.m gross, assuming the development retains about 25% of residents' expenditure.
- 7.36 Strategic housing development sites delivering this scale of new homes in the study area during the Plan Period to 2041, could be as follows:
- land east of Market Harborough Road, Market Harborough;
 - land south of Gallow Field Road, Market Harborough;
 - land west of Warwick Road, Kibworth;
 - land north of London Road / east of Leicester Grammar School, Great Glen;
 - land off Frolesworth Road, Broughton Astley; and
 - land south of Gartree Road / east of Oadby.
- 7.37 If new local shops and services are provided in some of these strategic housing developments, then any residual floorspace capacity up to 2041 identified in Table 7.5 could be accommodated.
- 7.38 Notwithstanding the limited short to medium scope for additional development, over and above the reoccupation of vacant units, commitments and proposals, the future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units or proposed commitments. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.

8.0 Policy implications

8.1 This Section sets out the implications for emerging policies within the new Local Plan.

Hierarchy of centres

8.2 In relation to town centres, the NPPF Annex 2 Glossary indicates:

“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.”

8.3 The network of town centres is currently set out in the Harborough Local Plan 2011-2031. Policy SS1 (Spatial Strategy) sets out the spatial strategy for development, whilst Policy RT2 Town and local centres, sets out the retail hierarchy for Harborough. Policy SS1 directs growth to appropriate locations in accordance with the identification of Market Harborough as a Sub-Regional centre, above Lutterworth and Broughton Astley as Key Centres, and includes a wider range of settlements in its rural centres category. The following retail hierarchy is designated in Policy RT2:

- 1 Town centres: Market Harborough, Lutterworth;
- 2 District Centre: Broughton Astley;
- 3 Local Centres: Fleckney, Great Glen, Kibworth.

8.4 Policy RT2 designates Town Centres, a Primary Shopping Area for Market Harborough within the Policies Map, and Local Centre boundaries (i.e. the Town Centre equivalent) for Local Centres.

8.5 Continuing to identify the hierarchy of centres in the new Local Plan will be important in terms of:

- 1 ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
- 2 directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
- 3 identifying a viable role and strategy for each centre.

8.6 The analysis of centres in Section 4 and Appendix 2 indicates the current designation of centres and hierarchy are sound. However, the Council could consider upgrading the status of Kibworth to district centre level. There are also opportunities to amend centre boundaries in the local centres to more appropriately reflect the extent of town centre uses, as outlined later in this section.

8.7 Market Harborough, followed by Lutterworth, are the largest and dominant town centres in the District. Market Harborough should continue to be identified as the main comparison good shopping destination and a focus for food/beverage and leisure. Lutterworth has an adequate retail and service offer for a centre of its size. Both town centres should continue to provide the focus for retail and leisure development in the District, serving communities within the wider District area.

8.8 Broughton Astley as a district centre plays important role as a focal point for the settlement, but it does not offer the same range and choice of shops and services available within Market Harborough and Lutterworth. This role should be protected. The centre’s range of

shops and services is comparable with Kibworth, which is lower in the centre hierarchy. There is scope for the development of Broughton Astley's centre to fill vacancies and improve its offer. This will enable it to continue its role as a district centre serving its resident population and the surrounding area, reducing the need to travel and improving sustainability.

- 8.9 The District's local centres are geographically concentrated in the central and northern parts of the District serving this predominantly rural area. They primarily serve the needs of their respective settlements and a limited rural catchment area. Kibworth is the exception with a relatively good provision of comparison goods shops, which suggests the Council should consider upgrading this centre.
- 8.10 Great Glen and Fleckney should continue to be designated as Local Centres that will provide important local access to lower order retail and services for their communities. This will reduce the need for residents to travel, increases opportunities for social interaction and support local jobs.
- 8.11 Great Glen and Fleckney have limited facilities and may be under threat if shop/service closures occur in the future. Great Glen in particular, has a small selection of shops and services and is relatively fragmented. Continued protection is needed for these local centres to support their continued role of providing local facilities to residents, within walking distance.

Impact and sequential tests

- 8.12 Local Plan Policy RT2 relates to the development of town centre uses outside of town, district and local centres. Market Harborough and Lutterworth town centre are defined, and there is an additional level of preference for Market Harborough's Primary Shopping Area, designated as the 'focus for retail uses'.
- 8.13 The sequential test in Policy RT2 is consistent with the NPPF and indicates that development for main town centre uses:

'should be located in the defined Town Centres, then in edge of centre locations and only outside defined town centres if a sequential test shows that the development, having demonstrated appropriate flexibility in form and scale, cannot be accommodated within a suitable and available centre or edge of centre location.'
- 8.14 The NPPF (paragraph 92) state that "when considering edge-of-centre and out-of-centre proposals, preference should be given to accessible sites which are well connected to the town centre." An out-of-centre site could be rejected under the sequential test where it is not accessible or not well connected to the town centre, and where another accessible and well-connected site is available and suitable. To avoid potential confusion, New Local Plan policies should reflect the NPPF wording.
- 8.15 Policy RT2 indicates the development of main town centre uses outside the defined town centres, or outside the primary shopping areas in Market Harborough town centre, will only be permitted:

'if an impact assessment demonstrates that the proposal would not have a significant adverse impact on the vitality and/or viability of existing centres. An impact assessment will be required for development of, or in excess of:

- a. 1,500 square metres gross in Market Harborough; and*
- b. 500 square metres gross elsewhere in the District.'*

- 8.16 This policy applies to the District's local centres in the same way.
- 8.17 The impact test within Policy RT2 is broadly consistent with the NPPF. However, the NPPF indicates the impact test only applies to retail and leisure uses, rather than all main town centre uses. Reference to main town centre uses in Policy RT2 criterion 5 could be amended to refer to retail and leisure uses. The NPPF does not clearly define "leisure uses" but the NPPF Glossary in relation to main town centre uses refers to retail development and "leisure, entertainment and more intensive sport and recreation uses" which can be interpreted to mean leisure uses that are classified as main town centre uses.

Impact threshold

- 8.18 The PPG provides guidance on setting locally appropriate thresholds, and indicates it will be important to consider:
- the 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; and
 - the likely effects of development on any town centre strategy; and the impact on any other planned investment.
- 8.19 There is the potential to review the current impact thresholds in Local Plan Policy RT2 for impact assessments, i.e. 1,500 sq.m gross in Market Harborough and 500 sq.m gross elsewhere in the District. Fleckney's Neighbourhood Plan proposes a lower impact threshold of 100 sq.m. gross for impact assessments, due to the smaller scale of its retail units.
- 8.20 The relatively low floorspace capacity projections set out in Tables 7.1, 7.2 and 7.3, combined with the pipeline commitments/proposals, the relatively high shop vacancy rate in Broughton Astley and uncertainties about the post-cost of living crisis recovery suggest Harborough's centres are now more vulnerable to out-of-centre developments. Market Harborough's threshold of 1,500 sq. m. is relatively high considering the low floorspace projections.
- 8.21 The Council should consider introducing a consistent amended impact threshold in line with the Sunday trading limit (up to 500 sq.m gross or 280 sq.m net sales) to protect the vitality and viability of centres across the District. This threshold better reflects the much lower floorspace projections and the small scale of some centres and their fragile vitality and viability.
- 8.22 The level of detail required in the impact assessment will vary case-by-case and it is for the applicant to provide robust justification that their impact assessment is robust, appropriate and proportionate. The NPPG indicates impact assessments need to be undertaken in a proportionate and locally appropriate way, drawing on existing information where possible.

Implications of UCO changes for the impact and sequential tests

- 8.23 Retail and leisure uses previously related to use classes A1 to A5 and D2 leisure uses. Changes to the UCO may lead to confusion. For example, not all uses within the new Class E are retail or leisure uses, requiring an impact assessment i.e. offices and medical uses. Bearing in mind the potential for confusion arising from the UCO changes and for consistency with the NPPF, new Local Plan policies relating to the impact test should, as indicated above, refer to retail and those leisure and entertainment uses included in the list of main town centre uses in the NPPF Glossary rather than Class E within the new UCO. The sequential test should continue to refer to all main town centre uses as described in the NPPF glossary.

Sequential test floorspace threshold

- 8.24 The NPPF does not refer to a minimum floorspace threshold where the sequential test will be applied to main town centre uses in the same way as the impact test. All main town centre uses regardless of scale are required to comply with the sequential test. However, the PPG suggests some certain main town centre uses have “particular market and locational requirements that mean they may only be accommodated in specific locations”, but robust justification must be provided to satisfy the sequential test in this respect. This approach may allow smaller scale local facilities outside designated district and local centres to be provided in areas that may be poorly served and/or within mixed use development to provide facilities catering for the local needs of the development, without needing to consider the sequential test.
- 8.25 The sequential test under Local Plan Policy RT2 allows main town centre uses outside of the defined Town Centre or edge of centre location (or outside of the local centre of Local Centres) only if the development “having demonstrated appropriate flexibility in form and scale, cannot be accommodated within a suitable and available centre or edge of centre location.” This guidance does not refer to new facilities in rural areas poorly served by amenities or new strategic housing developments. Policy RT2 could be amended in the new Local Plan to support small scale (below 200 sq.m gross) shops and services outside designated centres, where a particular market and locational requirement has been robustly justified.

Town centre and primary shopping area boundaries

- 8.26 The new Local Plan should continue to define clear boundaries for town, district and local centres on the Proposals Map. Designated centres should remain the expected focus for retail, leisure and other main town centre uses. The classification of centres within the hierarchy is important in identifying which centres are relevant in the search for sequential sites.
- 8.27 The continued identification of town, district and local centre boundaries and a Primary Shopping Area (PSA) in Market Harborough are important when applying the sequential approach, to direct retail and other main town centre uses to sustainable locations and determine whether a retail impact assessment is required. The NPPF continues to indicate that the first preference for retail uses should be the PSA.

- 8.28 The first preference for leisure and other non-retail main town centre uses is normally the wider defined town centre area, which usually includes the PSA and other parts of the town centre. The ability to focus new retail uses within the PSA, rather than the wider town centre area, has become more difficult with the introduction of the new Class E, which allows free movement to and from retail use and other town centre uses. The continued need for both a town centre boundary and a PSA area in Market Harborough town centre needs to be considered.
- 8.29 The area of search for sequential sites i.e. relevant centres will depend on the scale, nature and location of the proposed town centre uses and the catchment area they are likely to serve, and should be considered on a case-by-case basis. As indicated above, some proposed main town centre uses may have market and locational requirements that cannot be met within designated centres. Where this requirement is suggested, robust justification must be provided by the applicant.
- 8.30 The relatively low floorspace capacity projections suggest there may be no need to extend centre boundaries to accommodate future growth. However, the floorspace projections suggest a small long-term under-supply of floorspace, that implies the contraction of most centre boundaries is also unnecessary. The expansion or contraction of centre boundaries should be considered on a centre-by-centre basis, as outlined below. This review of boundaries is based on site visits and the assessment of centre set out in Appendix 2.
- 8.31 The contraction of centre or PSA boundaries is only likely to be appropriate where there is a concentration of non-town centre uses on the periphery of centres e.g. residential gaps in frontages or a concentration of vacant shop units. Boundary contraction would enable new non-main town centre uses to come forward if required.

Market Harborough

- 8.32 The current town centre boundary for Market Harborough is relatively widely drawn, including large stores and car parks at the southeast of the centre, as shown in Figure 7.6 in the previous Section. The eastern sections of St Mary's Road have relatively low concentrations of retail and leisure uses, and the northern area of the High Street which is now dominated by Brooke House College and office uses. The allocation for leisure (RT4) on St Mary's Road warrants continued inclusion within the wider town centre boundary, and as offices are included as town centre uses in the NPPF, no contraction of the town centre boundary is necessary. Continued inclusion of these areas will help to meet future demand, as the expansion of shop units has already been identified as necessary to do so.
- 8.33 The current PSA is tightly drawn around the main shopping streets of Market Harborough and includes St Mary's shopping centre and Sainsbury's supermarket. No contraction or expansion of the designated PSA is considered necessary.
- 8.34 The shop vacancy rate in the town centre is below the UK and District average, but utilising this space and the vacated Aldi store could bring forward 2,000 sq.m of floorspace, a considerable contribution to meeting demand. After commitments /proposals there is still a residual requirement of about 3,000 sq.m gross, excluding the projected need for leisure floorspace. Any long-term residual capacity could be accommodated on the current Policy RT1 Commons Car Park allocation plus the Policy RT4 mixed-use allocation. Proposals for local shops and services within strategic housing allocation on the edge of Market

Harborough urban area would also assist in meeting the residual long-term floorspace capacity projections.

Lutterworth

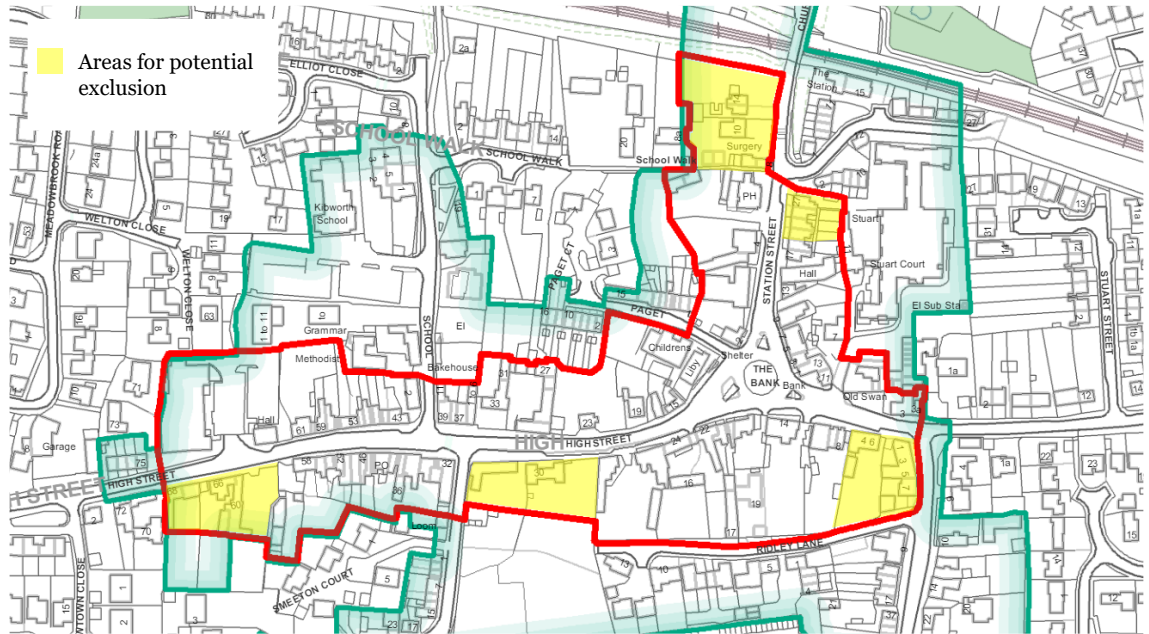
- 8.35 The Lutterworth town centre boundary is also relatively widely drawn, as shown in Figure L1 in Appendix 2. It includes the Morrisons and Waitrose stores, and areas with low concentration of retail or town centre uses, beyond the main shopping streets e.g. parts of George Street North of Coventry Road. However, as assessed in Appendix 2, George Street's role as forming a pedestrian circuit, linking to the Library and small bus station, warrants its preservation in the boundary to avoid fragmentation. The shop vacancy rate in the town centre is below the UK average, but above the average for the District. Utilising vacant floorspace and existing commitments (excluding land east of Lutterworth) would absorb projected growth up to 2041. No contraction or expansion of the designated town centre is considered necessary in Lutterworth. The implementation of development a new neighbourhood centre totalling 1,500 sq.m gross at land east of Lutterworth could absorb further growth in the District.
- 8.36 Broughton Astley's Principal Shopping and Business area is defined in its Neighbourhood Plan, as shown in Figure B1 in Appendix 2. It is tightly drawn around its retail and service area, including the Orchard Road car park and Library. The shop vacancy rate in the centre is above the UK and District averages. Utilising this space would leave a long-term residual floorspace requirement in 2041 of only 150 sq.m. If needed this small residual requirement could be met by intensifying uses within the existing Shopping and Business Area. No changes are recommended to the boundary of Broughton Astley's Shopping and Business area due to surrounding residential uses.

Local Centres

- 8.37 The remaining long-term residual floorspace requirement for the rest of Harborough is only 640 sq.m gross in 2041. This projected requirement primarily relates to population growth in Zone 3 (Great Glen / Kibworth), much of which relates to proposed new homes to be provided east of Oadby and potentially other large housing developments near Great Glen and Kibworth. These strategic housing developments could include local shops and services, probably after 2036, which would absorb the residual floorspace requirement to 2041. No significant expansion of existing local centres is considered necessary, based on the capacity projections.
- 8.38 Kibworth Local Centre is relatively widely drawn in the Local Plan, as shown in Figure 8.1. The Kibworth Neighbourhood Plan also designates a Local Shopping Area for Kibworth, which covers a similar, but slightly smaller area. The centre has retained a good choice of shops and services when compared with the other local centres in Harborough District. The redesignation of Kibworth to district centre status outlined earlier, should be considered assuming the retention of existing shops and services, without an expansion of the centre.
- 8.39 There is some fragmentation of frontages, with gaps in commercial uses in the central and eastern sections of the High Street, and a mix of office vacancies and residential uses to the north of Station Street. These residential properties are not suitable for main town centre uses and should be excluded from the centre boundary, particularly areas on the periphery of the centre. These peripheral areas are already excluded from the Local Shopping Area in

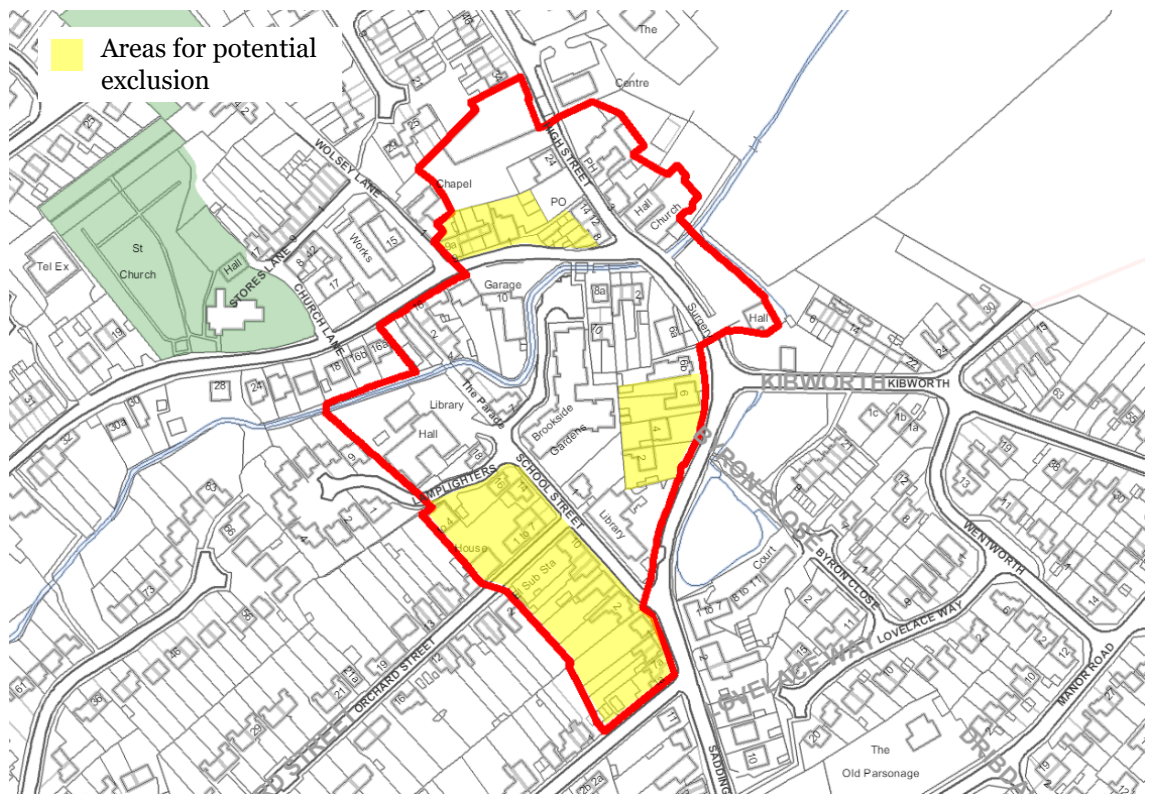
the Neighbourhood Plan. The areas that should be considered by the Council for exclusion are shown in Figure 8.1.

Figure 8.1 Kibworth Local Centre – potential boundary changes



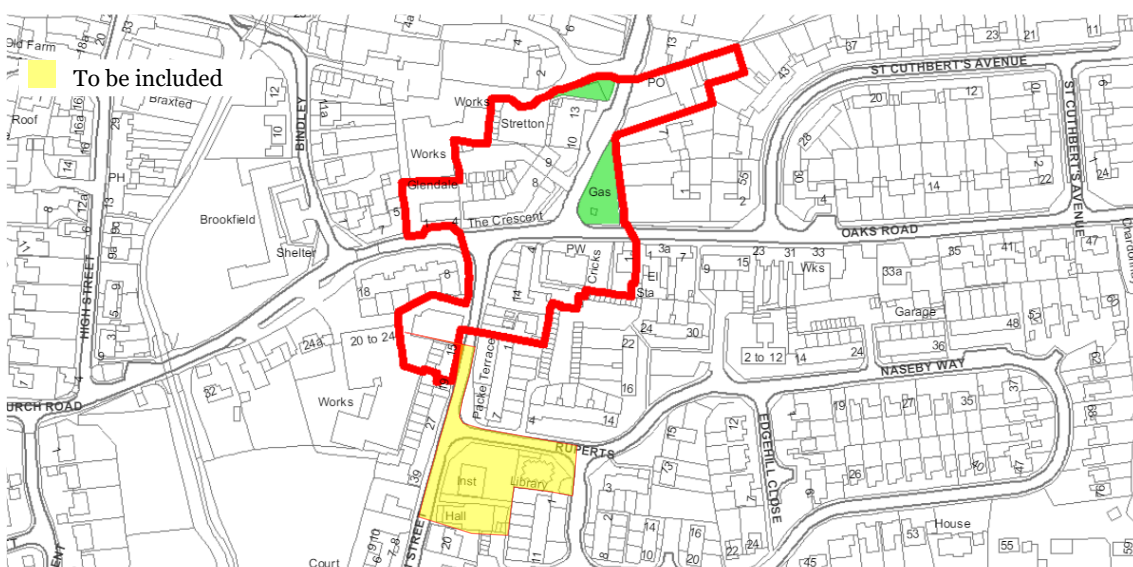
8.40 Fleckney’s Local Centre is also widely drawn in the Local Plan and Neighbourhood Plan. There is scope to consolidate the centre boundary, as shown in Figure 8.2.

Figure 8.2 Fleckney Local Centre – potential boundary changes



- 8.41 Along the southern section of the High Street, the commercial frontage is fragmented, with a group of three residential units separating the takeaway from the library. On the southwestern side of School Street, there is only one service use amongst a run of houses. The north side of Main Street is also in residential use. The residential properties are not suitable for main town centre uses and the Council should consider their exclusion from the centre boundary.
- 8.42 Great Glen’s Local Centre boundary is tightly drawn around the retail and service uses, as shown in Figure 8.3. Several residential units are included for example either side of Great Glen Methodist Church. However, commercial uses in the centre are relatively fragmented, which makes the designation of a centre boundary difficult without including some residential uses. Recognising the fragmented nature of uses in the centre, the boundary could be extended to include the Library and Community Centre, as shown in Figure 8.3.

Figure 8.3 Great Glen Local Centre – potential boundary changes



Controlling the mix of uses

- 8.43 The ability to control the mix of uses within centres and designated frontages has changed significantly since the Local Plan was adopted in 2019. Current and future market trends; the relatively low retail floorspace capacity projections; and changes to the NPPF and the UCO; indicate a more flexible approach to shop frontage policies and the mix of uses within centres should be considered. The adopted Harborough Local Plan does not contain traditional shop frontage policies seeking to control the mix of uses within town, district or local centres, but Policy RT2 criterion 2 indicates proposals for main town centre uses and residential uses will be permitted in Market Harborough and Lutterworth town centres subject to scale, design and harm to the vitality and viability of the centre considerations. Additionally, in Market Harborough primary shopping area (PSA) development is permitted where it maintains the existing retail function of the area and does not lead to a concentration of non-retail uses that would undermine the vitality and viability of the areas’ primary retail function.

- 8.44 A balanced approach is necessary that recognises the need to maintain and enhance each centre's retail role, as well as introducing new non-retail uses including activities in the early evening and night-time economy. However, there is still a need to retain and encourage new retail uses previously categorised as Class A1 uses within the town, district and local centres, but changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR) will restrict the future policy approach.
- 8.45 Considering the changes to the UCO and PDR, restrictive policies may be unsound and unimplementable for existing premises. However, the introduction of Article 4 directions can be considered e.g. to remove permitted changes of use from Class E to residential (Class MA). However, Article 4 directions cannot prevent movement within the same use class i.e., new Class E. The loss of retail uses to other sub-categories of Class E cannot be controlled.
- 8.46 In some circumstances the introduction of restrictive shop frontage policies or Article 4 directions could be inappropriate e.g. in areas with a high level of vacancies and where an increase in vacant units could harm the vitality and viability of the centre, for example in Lutterworth town centre.
- 8.47 Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses can be assessed against criteria-based policies e.g. relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. Betting shops and hot food takeaways are Sui Generis uses that can still be controlled by policy, and this is not affected by changes to the Use Classes Order or Permitted Development Rights.
- 8.48 Notwithstanding the reduced controls, the mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required i.e., where there is a change of use requiring planning permission, redevelopment or new development is proposed, in the same way planning conditions/legal agreements were previously used to control movement usually permitted within the former Class A uses. This approach could be used to control the mix of ground floor uses on development site allocations.
- 8.49 The new Local Plan could continue to designate a PSA in Market Harborough town centre to protect the retail function of the area. The introduction of a PSA is not considered necessary for Lutterworth, where retail uses are fairly dispersed through the centre. Other designated centre boundaries for Lutterworth and the Local Centres can continue to be used to control the mix of uses, rather than a PSA or frontage designations. Broughton Astley's centre boundary could be formally adopted in the new Local Plan.
- 8.50 The existing requirement in Policy RT2 giving a preference to retail and town centre uses within these defined boundaries is still appropriate following the changes to the UCO. It is recommended that this is retained in the new Local Plan. A laissez-faire approach that does not seek to protect retail and town centre uses, on the basis that the market will determine the appropriate mix of uses within town centres is unnecessary because shop vacancy rates are generally low within the District and this approach could undermine the retail role of some centres.

Recommended policy approach

- 8.51 Within Market Harborough's PSA the objective should be to maintain and enhance the retail offer and other uses within Class E. Development should maintain an active frontage.

Within other parts of the town, district and local centres a wider range of main town centre uses including Class E, Sui Generis and Class F could be promoted and protected.

- 8.52 Proposals that require planning permission that would result in the loss of these uses at ground floor level in the PSA or wider town centre should only be permitted subject to criteria relating to:
- individual or cumulative impact on neighbouring amenity;
 - adverse impact on the vitality and viability of the centre as a whole;
 - provision of an active frontage at ground floor level which relates well to the design of the building and to the street-scene and its setting; and
 - adequate marketing of the unit for Class E uses in the PSA or Class E, Sui Generis and Class F uses in other parts of the centre.
- 8.53 Encouraging Class E uses within Market Harborough's PSA will include non-retail main town centre uses e.g., offices and leisure uses. Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses can be controlled in the PSA, but could be encouraged to locate in other parts of the town centre where appropriate i.e., preventing breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. This approach will allow significant flexibility within the town centres.
- 8.54 In the future and in specific cases, it may be appropriate to consider Article 4 directions to prevent permitted changes of use that could undermine the character or vitality and viability of parts of town centres. This approach could be appropriate where concentrations of non-commercial uses are emerging through PD rights, creating dead frontages and gaps in activity. However, this approach could be inappropriate in areas of low demand for retail and main town centre uses, because it could lead to higher levels of vacancy. Furthermore, Article 4 directions cannot restrict the movement of activities within the new Class E and the potential to use this approach is limited in relation to retaining retail uses within the centre. At present there have been few PD rights changes of use in Harborough District's centres and there are no obvious concentrations of non-commercial uses or dead frontages. The introduction of Article 4 directions is not considered necessary at present.
- 8.55 The mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required i.e., changes of use requiring planning permission, redevelopment or new development is proposed. This approach could be used to control the mix of ground floor uses on development site allocations in centres.

9.0 Conclusions and recommendations

9.1 This section draws together the analysis set out in previous sections and provides strategic recommendations for Harborough District. It explores how the identified growth and change across the District could be accommodated and the future role of the town centres.

Meeting Harborough's needs

9.2 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability. The combined floorspace projections for retail and food/beverage floorspace in 2031, 2036 and 2041 are summarised and rounded in Tables 8.1 and 8.2.

Table 9.1 Combined retail and food/beverage floorspace requirements (sq.m gross) - cumulative

	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food /beverage (sq.m gross)	Total (sq.m gross)
By 2031	-140	1,530	2,340	3,730
By 2036	530	2,630	4,080	7,240
By 2041	1,300	4,130	5,870	11,300

Table 9.2 Combined floorspace requirements by location (sq.m gross) - cumulative

	By 2031	By 2036	By 2041
Market Harborough	2,490	4,870	7,650
Lutterworth	280	570	960
Broughton Astley	150	290	450
Kibworth	220	400	580
Other	590	1,110	1,660
Total	3,730	7,240	11,300

9.3 The leisure expenditure projections indicate there may be potential to accommodate an additional 1,100 sq.m gross of commercial leisure and cultural floorspace by 2036, increasing to 1,500 sq.m gross by 2041, which could include:

- a small boutique cinema (one or two screens);
- one or two medium sized health and fitness facilities (between 70 to 140 fitness stations);
- a small tenpin bowling facility within a multi-use leisure facility;
- a bingo hall (subject to operator demand and trends in on-line gambling); and
- new leisure innovations e.g. soft play, indoor climbing, escape rooms, virtual sport activities; and

- small scale tourist attractions/cultural facilities.

- 9.4 Long-term floorspace capacity forecasts beyond 2036 years are susceptible to unforeseen circumstances. Growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored, including the continued growth in home/internet shopping. Long-term projections must be treated with caution and kept under review. The new Local Plan should seek to accommodate as a minimum up to 2036.
- 9.5 The combined total projection to 2036 is 7,240 sq.m gross. This projection can be accommodated in vacant town centre units and residual growth could be absorbed by commitments/proposals. The capacity projections suggest there is no pressing requirement to allocate sites for major retail/leisure development to accommodate projected growth for the next ten years. The priority in the short to medium term will be the reoccupation of vacant shop units. Any longer-term residual need between 2036 to 2041 could be accommodated a combination of existing Policy RT1 and RT4 mixed-use development allocations in Market Harborough and/or local shops and services within strategic housing developments of over 400 new homes.
- 9.6 The future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.

Future planning policy

Hierarchy of centres

- 9.7 Identifying the hierarchy of centres and the boundaries of centres in the new Local Plan is important in terms of:
- ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
 - directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
 - identifying a viable role and strategy for each centre.
- 9.8 The existing designation of town, district and local centres is appropriate and sound, but the Council could consider upgrading Kibworth to District Centre status.

Impact and sequential tests

- 9.9 The new Local Plan should continue to set out the sequential and impact tests and which designated centres need to be considered. New Local Plan policies relating to the impact test should refer to retail and leisure uses rather than Class E within the new UCO. The sequential test should refer to all main town centre uses as described in the NPPF glossary. Office uses should only be required to comply with the sequential test but not the impact test. New Local Plan policies should reflect the NPPF wording.
- 9.10 The NPPF minimum threshold of 2,500 sq.m gross continues to be an inappropriate threshold for Harborough District. Market Harborough's threshold of 1,500 sq. m. is

relatively high considering the low floorspace projections. The Council should consider introducing a consistent amended impact threshold in line with the Sunday trading limit (up to 500 sq.m gross or 280 sq.m net sales) to protect the vitality and viability of centres across the District.

- 9.11 Current Local Plan policies do not actively support new facilities in poorly served areas. Small scale shops and services outside designated centres could be supported, where a particular market and locational requirement has been robustly justified.

Town and local centre boundaries

- 9.12 The new Local Plan should continue to define clear boundaries for town and local centres on the Proposals Map and these should remain the focus for retail, leisure and other main town centre uses. The continued need for both town centre boundaries and primary shopping areas (PSA) in Market Harborough remains sound. However, a separate PSA, in addition to the centre boundary, is not necessary in other centres.

- 9.13 The relatively low retail floorspace capacity projections, particularly up to 2036, suggest there is no need to extend centre or PSA boundaries to accommodate future growth, but the longer term projected under-supply of floorspace implies the contraction of most centre boundaries is also unnecessary. Some minor amendments to Local Centre boundaries could be considered.

Controlling the mix of uses

- 9.14 The designated Market Harborough PSA should be retained. In this area retail and other Class E uses should be maintained and enhanced. Development should maintain an active frontage. Within other parts of the town centres a wider range of main town centre uses including Class E, Sui Generis and Class F could be promoted and protected.

- 9.15 Proposals that require planning permission that would result in the loss of these uses at ground floor level in the PSA or wider town centre should only be permitted subject to criteria relating to:

- individual or cumulative impact on neighbouring amenity;
- adverse impact on the vitality and viability of the centre as a whole;
- provision of an active frontage at ground floor level which relates well to the design of the building and to the street-scene and its setting; and
- adequate marketing of the unit for Class E uses in the PSA or Class E, Sui Generis and Class F uses in other parts of the centre.

- 9.16 The introduction of Article 4 directions to prevent permitted changes of use that could undermine the character or vitality and viability of parts of town centres is not considered necessary at present in Harborough District.

Future monitoring

- 9.17 The recommendations and projections within this study will assist the Council in reviewing development plan policies over the coming years and assist future development management decisions. The study provides an overview of the potential need for further

retail and leisure development in the medium and long-term up to 2041. Longer-term projections beyond 2036 are subject to uncertainty and forecasts will need to be amended to reflect emerging changes, as and when new information becomes available. These uncertainties include the longer-term implications of the Covid-19 and cost of living crisis that will need to be monitored. Longer-term projections after 2036 should be treated with caution and provide broad guidance only. Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary every 4-5 years:

- population projections;
- local expenditure estimates (information from Experian or other recognised providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities; and
- implemented development within and around the study area.

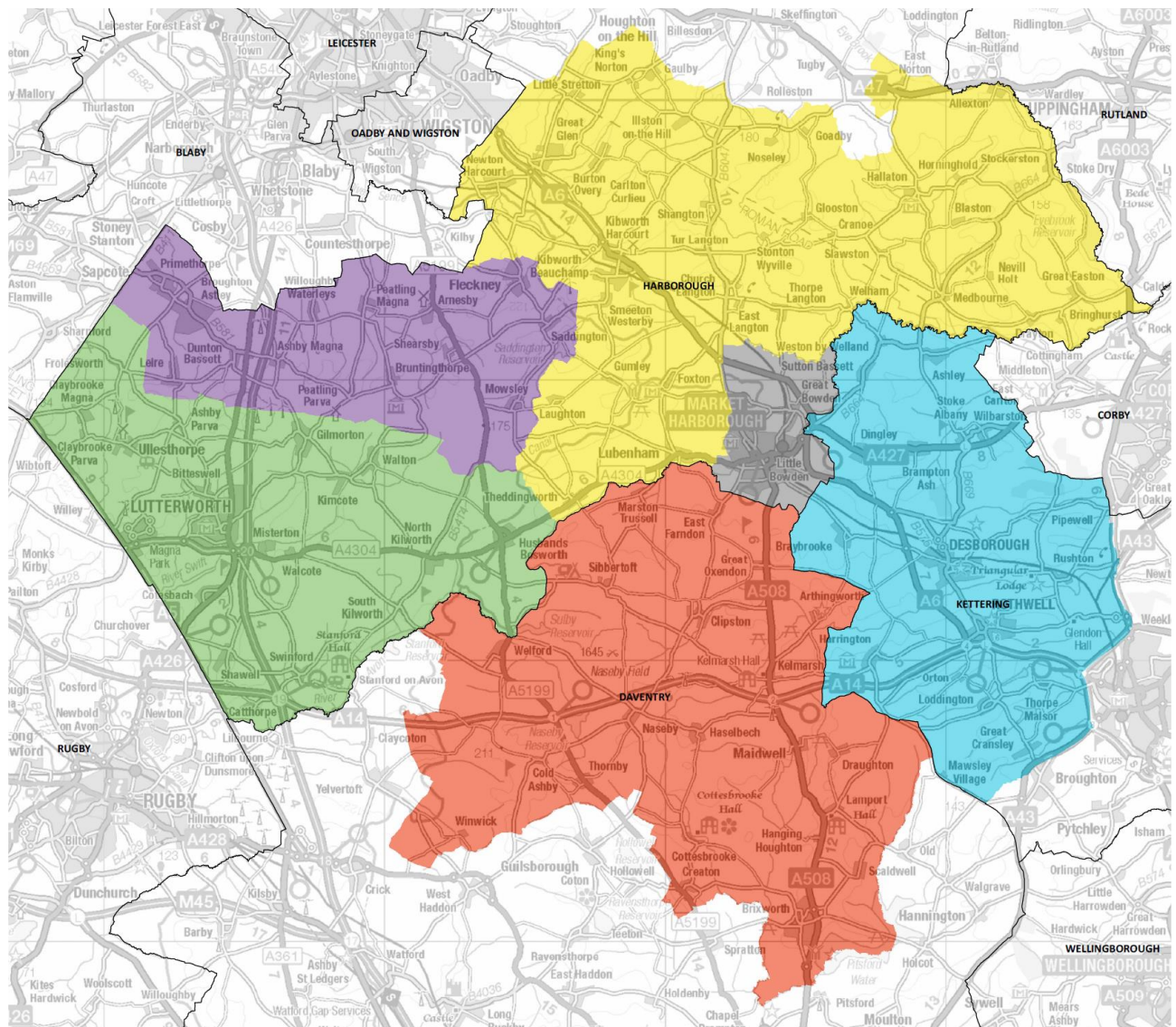
9.18 These key inputs into the retail/leisure capacity assessment can be amended to provide revised capacity projections. The mix of uses within the town centres should be quantified, if not annually, every two to three years to monitor key changes and trends that could affect the vitality and viability of the centre.

Appendix 1 Study Area


Table 1 Study Area Zones and Ward areas

Zone	Wards	Household survey sample
1. Lutterworth	E05011965 Bosworth E05011973 Lutterworth East E05011974 Lutterworth West E05011979 Misterton E05011982 Ullesthorpe	110
2. Broughton Astley / Fleckney	E05011966 Broughton Astley-Primethorpe & Sutton E05011967 Broughton Astley South & Leire E05011968 Dunton E05011969 Fleckney	100
3. Great Glen / Kibworth Beauchamp	E05011970 Glen E05011971 Kibworths E05011972 Lubenham E05011980 Nevill	110
4. Market Harborough	E05011975 Market Harborough-Great Bowden & Arden E05011976 Market Harborough-Little Bowden E05011977 Market Harborough-Logan E05011978 Market Harborough-Welland	140
5. Clieston / Brixworth	E05013244 Brixworth	100
6. Desborough / Rothwell	E05013219 Desborough E05013233 Rothwell and Mawsley	140


These study area zones are based on ward boundaries, as adopted in the 2013 study. However, the six zones have been amended in order to more accurately reflect the primary catchment areas of the main centres in Harborough District and the local authority boundaries. The six new zones also have less variation in terms of area covered and the resident population, which provides a more proportionate basis for the sampling within the household survey.




Key


 Local Authority Boundary

Zones

 Zone 1

 Zone 2

 Zone 3

 Zone 4

 Zone 5

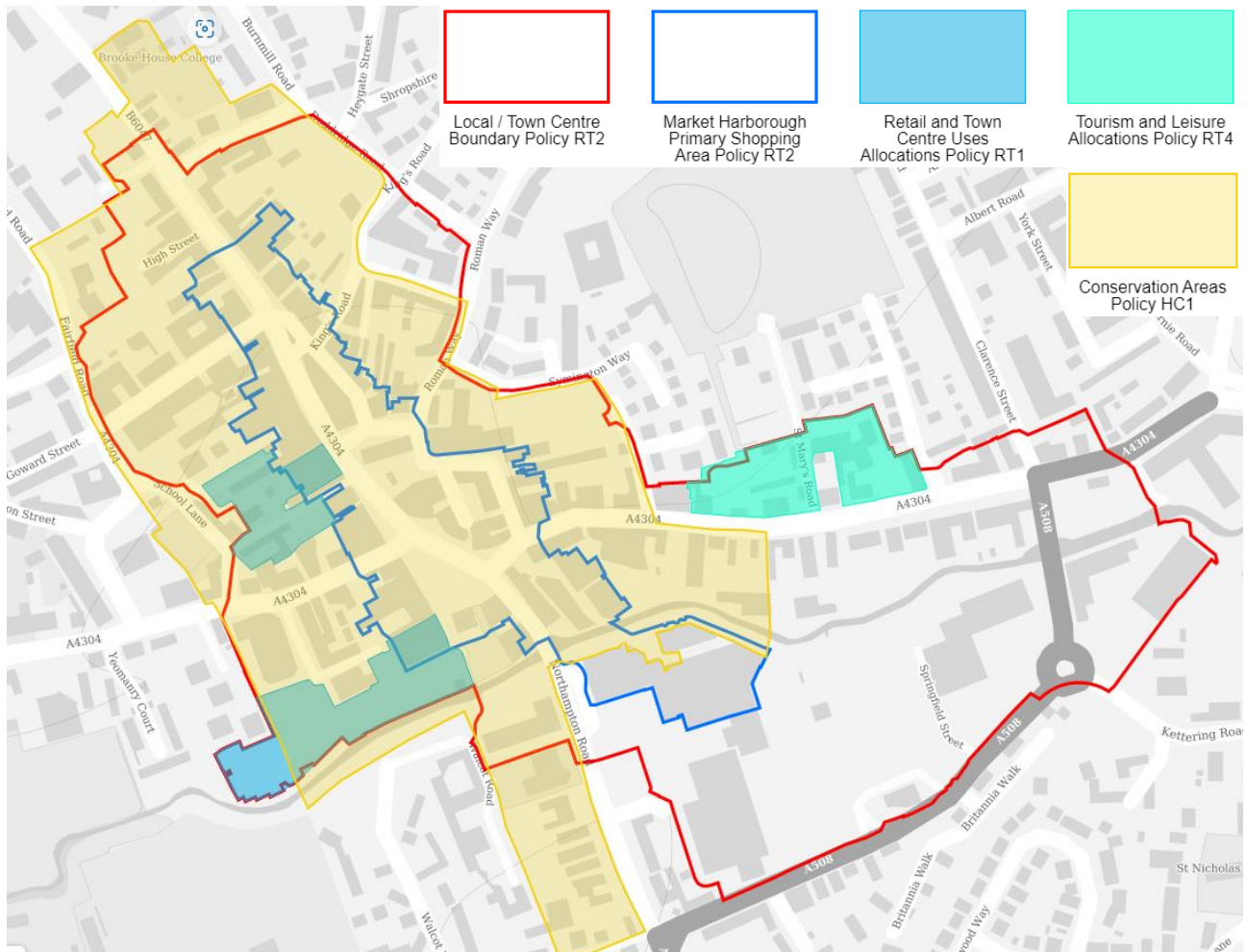
 Zone 6

Appendix 2 Centres health checks

MARKET HARBOROUGH TOWN CENTRE

- A1.2 Market Harborough town centre is located in the south of Harborough, to the east of Lutterworth. Its nearest similarly sized town centres are Kettering (approximately 20 minutes by car) and Corby (approximately 25 minutes by car). It is the largest of the two designated town centres in the District and serves a large rural catchment area for convenience and comparison shopping, restaurants and services.
- A1.3 The Harborough Local Plan 2011-2031 designates a Primary Shopping Area (PSA)/ within Market Harborough’s Town Centre, which is shown below. Within the PSA a Tesco Express and large Sainsbury’s store serve as anchor convenience stores. Most other large stores are close to the PSA boundary and within the Town Centre boundary, as shown on the plan below. These large stores are located at the Commons Car park in the southeast of the centre including a Co-op supermarket; Springfield Retail Park southeast of the PSA with large retail warehouse stores and three more large food stores i.e. Waitrose, Aldi and Lidl. Outside of the centre Welland / Euro Business Park to the east has furniture, homeware and hardware stores.

Figure M1 – Market Harborough town centre boundary - Harborough Local Plan 2011-2031 Proposals Map



A1.4 The centre is linear and ‘L’ shaped in form, extending about 200 metres along the High Street to The Square and Northampton Road. The centre branches out along Abbey Street, Coventry Road, St Mary’s Road, including the connected streets of Church Street and Adam and Eve Street. A pedestrianised St Mary’s Place shopping centre connects the High Street to Sainsbury’s to the South. Although linear in form the centre is relatively compact and easy to navigate, with a several pedestrian circuits.

Mix of Uses

A1.5 Within Market Harborough’s PSA, there are 278 retail and service units, and the mix of uses is set out in Table M1, which is compared with the District and UK averages. There were 18 vacant units (totalling 3,490 sq.m gross) within the centre in May 2024, a unit vacancy rate of 6.5%, which is below the District and UK averages. The floorspace vacancy rate is slightly higher at 6.6%. The relatively low vacancy rate suggests the supply of shop premises is broadly in line with operator demand. In 2012 there were 20 vacant units, which suggests the vacancy rate has slightly improved.

Table M1 - Mix of retail and service uses – Market Harborough town centre

Type	Number of units	% units	% units District average	% units UK average
Convenience retail	26	9.4	9.7	9.5
Comparison retail	112	40.3	34.2	27.7
Financial professional	28	10.1	10.6	8.5
Restaurants/cafés	31	11.2	9.9	10.0
Pubs/bars	10	3.6	4.0	4.9
Hot food takeaways	12	4.3	5.9	6.2
Other non-retail services	41	14.7	18.0	19.3
Vacant	18	6.5	7.6	13.9
Total	278	100.0	100.0	100.0

Source: Lichfields’ land use survey May 2024 and Goad Plan UK average.

A1.6 The composition of uses in Market Harborough is broadly similar to the District and national averages, with several notable differences. The centre has a higher proportion of comparison retail units, reflecting its role as the largest centre in the District. It has higher than average proportions of restaurants/cafés, but lower proportions of other non-retail services, pubs/bars and hot foot takeaways. A more detailed breakdown of comparison goods outlets and non-retail services is shown in Tables M2 and M3.

A1.7 Harborough’s comparison retail offer is varied, with 13 of the 14 Goad Plan shop categories represented, as shown in Table M3, with most categories having a good choice of outlets. Consistent with national trends, the number of comparison retail units has declined since 2012, from 139 to 112 units. The most significant losses have been in clothing and footwear (17 units); books, arts, cards and stationers (8 units); and DIY, hardware and homeware (7 units).

Table M2 - Mix of comparison goods retail uses – Market Harborough town centre

Type	Number of units	% units	% units District average	% units UK average
Clothing and footwear	32	28.6	22.2	21.1
Furniture, carpets and textiles	6	5.4	7.4	7.5
Books, arts, cards and stationers	6	5.4	6.2	6.2
Electrical, music and photography	9	8.0	6.2	9.3
DIY, hardware and homeware	8	7.1	8.0	7.0
China, glass and gifts	7	6.3	6.8	5.7
Cars, motorcycles and accessories	0	0.0	0.6	1.2
Chemists, drugstores and opticians	14	12.5	15.4	12.1
Variety, department and catalogue	1	0.9	1.2	1.6
Florists, nurserymen and seedsmen	2	1.8	2.5	2.2
Toys, hobby, cycle and sports	3	2.7	3.7	5.5
Jewellers	7	6.3	4.9	5.1
Charity and second-hand shops	11	9.8	9.3	9.9
Other comparison goods retailers	6	5.4	5.6	5.6
Total	112	100.0	100.0	100.0

Source: Lichfields' land use survey May 2024 and Goad Plan UK average.

- A1.8 Market Harborough has a good number of national multiples for a centre of its size, indicative of its position as the District's principal centre. Market Harborough also has an excellent selection of independent shops. There are 11 charity/second-hand shops. The national multiple outlets are shown in Table M4. There are 39 comparison goods retail multiples, 7 convenience goods retail and 12 food/beverage multiples.
- A1.9 Market Harborough has a good selection of non-retail services (122 units), as shown in Table M3. It has above-average provision of estate agents/valuers, hairdressers/beauty parlours, and restaurants/cafés. It has four banks, but the provision of banks/financial services, hot food takeaways and pubs/bars is below the UK average. Other leisure and community uses include hotels, Market Harborough Museum, a Library, and Harborough Theatre. At the northern end of the High Street Brooke House College occupies many former offices, professional service and hotel buildings.

Table M3 - Mix of non-retail service uses – Market Harborough town centre

Type	Number of units	% units	% units District average	% units UK average
Restaurant / café	31	28.2	23.4	24.6
Hot food takeaway	12	10.9	13.9	22.0
Public house / bar	10	9.1	9.5	11.4
Bank / other financial service	8	7.3	9.5	11.3
Betting shop / amusement	2	1.8	1.5	6.7
Estate agent / valuer	13	11.8	10.0	6.2
Travel agent	2	1.8	1.5	1.1
Hairdresser / beauty parlour	31	28.2	29.9	15.5
Launderette / dry cleaner	1	0.9	1.0	1.1
Sub-total	110	100.0	100.0	100.0
Other non-retail services	12			
Total	122			

Source: Lichfields' land use survey May 2024 and Goad Plan UK average.

Table M4 Multiple retailers – Market Harborough town centre

Comparison		Convenience	Food and Beverage
Grape Tree	Shoezone	Co-Operative Food	Greggs
WHSmith	Clarks	Holland and Barrett	Subway
Waterstones	The White Company	Lidl	Cook
Ryman	Phase Eight	Waitrose	Bewitched
Co-op pharmacy	New Look	Aldi	Costa
Boots	Homebase	Sainsbury's	Starbucks
The Hearing Centre	EE	Tesco	Caffe Nero
Vision Express	Vodafone		Zizzi
Specsavers	Card Factory		Pizza Express
Savers	Mountain Warehouse		Wildwood
Superdrug	The Works		JD Wetherspoon
Jojo Maman Bebe	Poundland		Papa John's Pizza
Fat Face	Loros		
Peacocks	Age UK		
White Stuff	Cancer Research UK		
Mint Velvet	British Heart		
Joules	Foundation		
Crew	Oxfam		
Jigsaw	Air Ambulance Service		
	PDSA		

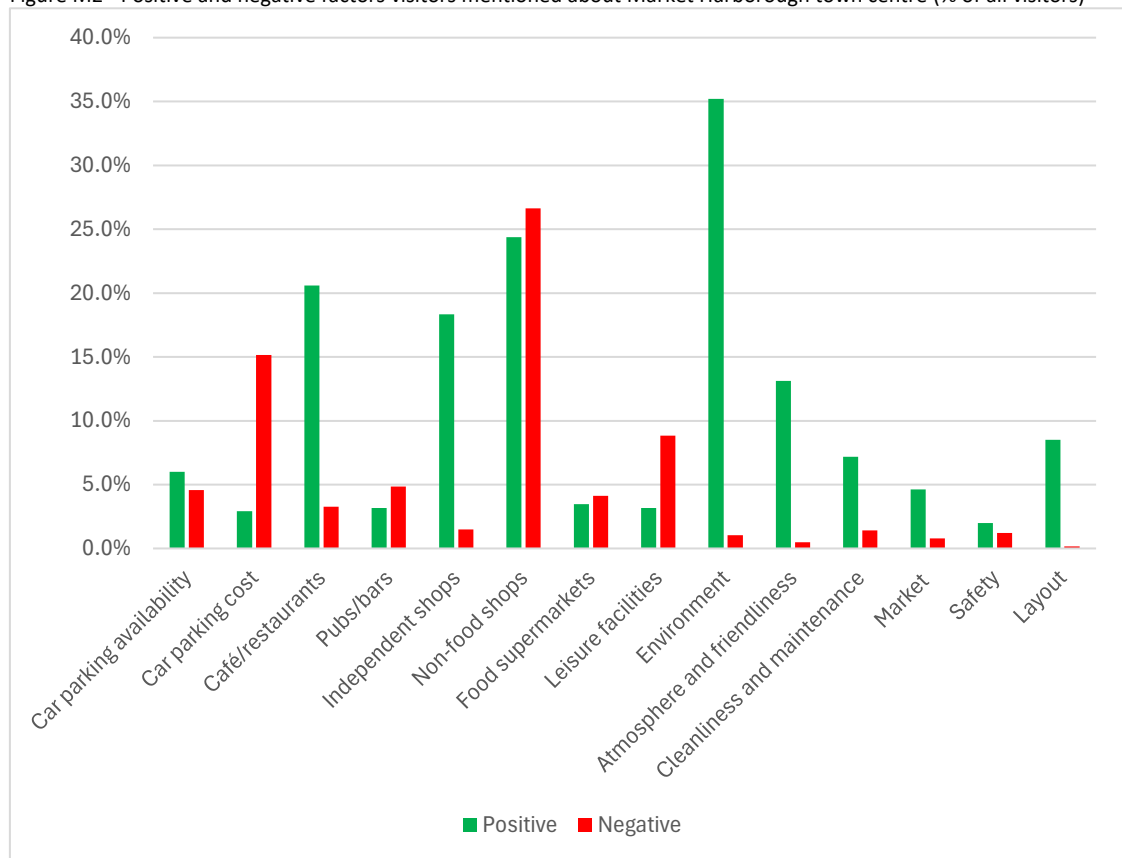
Source: Lichfields' land use survey May 2024.

Customer Views

A1.10 As part of the household survey, respondents across the study area were asked if they had used shop, services or leisure facilities in Market Harborough town centre in the last year. Around 79% of respondents in the study area had visited Market Harborough, the highest of all centres in the District. Of those who had used shops/services in Market Harborough, respondents were asked what they liked about the town centre and what improvements would make them visit more often. The main positive factors liked about Market Harborough town centre and the negative factors where improvements were suggested are compared in Figure M2 below.

A1.11 The survey results generally show higher levels of satisfaction than dissatisfaction with Market Harborough town centre, except for car parking cost, the availability of non-food shops, and leisure facilities. There were particularly high levels of satisfaction compared with dissatisfaction with cafés/restaurants, independent shops, and the quality of the environment, including atmosphere and friendliness, cleanliness and maintenance, the market, safety and layout. This suggests that Market Harborough’s public realm and town centre vitality is a key draw for visitors. Overall, the general levels of visitor satisfaction with Market Harborough town centre were higher than in Lutterworth and Broughton Astley.

Figure M2 - Positive and negative factors visitors mentioned about Market Harborough town centre (% of all visitors)



Source: NEMS household survey April 2024

A1.12 The attractiveness of the environment was the most liked attribute (33.3%), with its proximity to home being the fourth most important (16.1%), behind positive views about

cafes/restaurants (20.6%) and the range of independent shops (18.3%). This suggests that visitors are willing to travel to visit Market Harborough due to its attractiveness as a destination.

Customer activities and catchment area

- A1.13 The household survey results indicate about 79% of study area respondents had visited shops, services or leisure facilities in Market Harborough town centre during the last year, which was significantly higher than the next most popular centre, Lutterworth (30%). Most of these visitors to Market Harborough live in the south of Harborough, in Zone 4 – Market Harborough and Zone 6 – Desborough (outside of Harborough District). It is the most popular destination in all zones except for Zone 1 – Lutterworth, and marginally in Zone 2 – Broughton Astley/Fleckney.
- A1.14 The average length of stay for households visiting Market Harborough was 99 minutes, which was the highest in the district. This was significantly higher than Lutterworth (69 minutes) and Broughton Astley (46 minutes).
- A1.15 A total of 21% of households indicated that they do most of their non-food shopping in Market Harborough, significantly higher than Lutterworth (2%). Market Harborough's supermarkets and out-of-centre store attract expenditure, with 3% suggesting the B&M at Market Harborough's Euro Business Park is their main non-food retail destination.
- A1.16 Survey results suggest that Sainsbury's functions relatively well as an anchor store for the centre, with about 10% of households listing it as their main food shopping destination. The Tesco Express at The Square attracted only 1%, with the less centrally located Aldi attracting 12%, Lidl 6%, and Waitrose 4%. Of those that reported grocery shopping was part of a linked trip (35% of all respondents), 33% said this took place in Market Harborough's town centre, which was the highest of all centres and suggests a good spin-off trade between convenience to comparison shopping.
- A1.17 The breakdown of activities undertaken by visitors to Market Harborough town centre is shown and compared with the District average in Table M5. The centre has a higher proportion undertaking non-food shopping and visiting cafés/restaurants due to its choice of comparison shops and food and beverage offer. It has a lower proportion of visitors for services activities than the District average.
- A1.18 The retail capacity analysis suggests Market Harborough has a comparison goods turnover of £120.07 million in 2024, the highest of all destinations in the District. It attracts 38% of its comparison goods trade from the local Market Harborough Zone 4. Market Harborough attracts a reasonable level of trade from all six study area zones, indicating it has a District-wide shopping catchment area.
-

Table M5 Activities carried out by visitors to Market Harborough town centre (% of all visitors to each centre)

Activity	Market Harborough	Average for all centres
Shopping		
Non-food shopping	61.5	36.6
Food shopping	52.4	56.3
Window shop/browse	12.4	5.2
Visting the market	6.2	2.4
Leisure		
Go for a walk	8.3	5.5
Café/pub/restaurant	49.3	26.9
Leisure activity	14.1	10.5
Other services		
Banks/other financial institutions	4.7	1.8
Health facilities	10.6	16.4
Library	1.7	4.3
Getting petrol	5.0	2.4
Post office	2.3	9.4
Other service uses	6.6	8.2
Other activities		
Travelling to/from work	3.2	3.4
Education/school run	0.6	1.6
Visting family/friends	4.0	8.8

Source: NEMS household survey April 2024. * percentages add to more than 100% due to multiple activities.

Rental Levels

- A1.19 According to the Valuation Office Agency (VOA), Market Harborough has Zone A retail rental values of £630 per sq.m., the highest of all centres in the District. Within Market Harborough's PSA, values are highest in the central area of The Square, ranging between £600-£630 per sq.m, followed by St Mary's Place shopping centre, with values of £560 per sq.m. The High Street has some variation, with rental values ranging from £485-£600 per sq.m. Church Street and Church Square values range from £400-£485 per sq.m. Rental values are lowest along Adam and Eve Street and at Northampton Road, with consistent values of £375 per sq.m.
- A1.20 Outside of the PSA, along Abbey Street, Coventry Road, and St Mary's Road, rental values are much lower, ranging between £180 and £260 per sq.m. Along St Mary's Road, rental values decrease with distance from the centre, from £275 per sq.m to £180-200 per sq.m. towards the station.
- A1.21 Market Harborough has a good mix of shop properties ranging in cost, suitable for national multiples and small independent outlets.

Accessibility

- A1.22 Market Harborough Railway Station is located approximately half a mile to the east of the town centre, accessible within a 10-15 minute walk. There is reasonable signage for the

town centre, and well-placed road crossings. The trains run every 20 minutes to London, Nottingham, Leicester, Sheffield, Bedford and Loughborough, with connections to smaller centres such as Kettering, Beeston and Wellingborough.

- A1.23 There are four bus stops concentrated at The Square, providing good accessibility for the town centre. Market Hall bus station has two stands, with routes connecting to Leicester (X3, X7) Lutterworth (58), Welford (59), Northampton (77, X7), Foxton and Fleckney (44), Kettering (18), Cottingham (WW), Kibworth Beauchamp and Great Glen (X3), with local routes within the town (30, 33A) and adjacent villages of Little Bowden (33B) and Great Bowden (33C). There are bus stops further north along the High Street between Abbey Street and Bowden Lane but the signage is faded and there are no route details. Most bus stops are generally well-marked, and maintained with up-to-date information.
- A1.24 There is good signage to the centre, but based on Lichfields' observations congestion is an issue for access by car. There is some cycle storage at the Commons Car park and part of Northampton Road has a painted cycle lane.
- A1.25 The central spine along the High Street runs approximately 275 metres northwest-southeast before reaching The Square, a key focal point for the centre as a site for markets, connecting to The Commons car park. Church Square, further north on the eastern side of the High Street, is another key focal point. Connected Church Street and Adam and Eve Street form natural pedestrian circuits. Abbey Street and Coventry Road branch southwest from the High Street, with connections to Angel Street and The Commons car parks. At The Square, the centre continues along Northampton Road to the Market, and along St Mary's Road to St Mary's Place shopping centre, with connections across the river to Sainsbury's and Springfield retail park.
- A1.26 Market Harborough's layout is a significant strength, with few dead ends or underutilised areas. Its fine urban grain enables good pedestrian connectivity. Though the secondary streets of Abbey Street, Coventry Road, and Adam and Eve Street have lighter pedestrian flows, their connections as circuits or to well-sited car parks ensure their utility. Traffic through the centre is fairly consistent and despite ample pedestrian crossings, this does impede pedestrian flow. Further pedestrianisation beyond The Square and St Mary's Place shopping centre could be beneficial. The river is not a barrier with plentiful pedestrian crossings.
- A1.27 The Commons is the main off-street public car park in located near the central area of The Square, with 285 short-stay spaces. Additional central parking is located at Springfield Retail Park (including Sainsbury's); Mill Hill car park (Saturday only); long and short stay parking at St Mary's Road East & West; and further south outside the Market Hall. Towards the north of the centre, off-street parking is available at Angel Street car park, Symington Way, Kings Head Place, and two car parks at Doddridge Road.
- A1.28 Free parking is available at Welland Park car park, a 10-15 minute walk from The Square. Throughout the centre there is on-street parking with one hour free, including at the north of the High Street, on Coventry Road, Church Square, Adam and Eve Street and Roman Way. There is also some customer parking at Talbot Yard.
- A1.29 Parking is free on Sundays and bank holidays. The charging regime is set out below, followed by details of the number of spaces in each car park in Table M6:
-

- Short stay: up to 2 hours - £1.50; up to 3 hours - £2; up to 4 hours - £3; over 4 hours - £7.50. Charges in effect 7am-6pm Monday-Saturday, excluding bank holidays.
- Long stay: up to 4 hours - £2.50; over 4 hours - £5. Charges in effect 7am-6pm Monday-Saturday, excluding bank holidays.

Table M6 Market Harborough Car Parks

Car park	Spaces
The Commons	15x 30 minutes free 285x pay and display (short stay) 16x disabled spaces 3x motorcycle
Springfield Retail Park	20x 30 minutes free 452x pay and display (short stay) 16x disabled spaces
Mill Hill (Saturday only)	83x pay and display (short stay) 4x disabled spaces
St Mary's Road East	54x pay and display (long stay) 1x motorcycle
St Mary's Road West	30x pay and display (short stay) 1x motorcycle
Market Hall	75x pay and display (short stay) 2x disabled spaces
Symington Way	98x pay and display (short stay) 6x disabled spaces 4x motorcycle
Kings Head Place	26x pay and display (short stay)
Angel Street	88x pay and display (long stay) 6x disabled spaces
Doddridge Road	55x pay and display (long stay) 3x motorcycle (long stay) 77x pay and display (short stay)

Source: Harborough District Council

- A1.30 Of the household survey respondents who had visited Market Harborough town centre in the past year, respondents mentioned accessibility factors liked as follows: easy to find parking spaces (6%), easy to get there on foot (2.6%), good disabled access (0.5%), pedestrianised area (1.9%), free parking or cheap parking (1.5% / 1.4%) and easy to get there by car (1.4%).
- A1.31 Survey respondents were also asked what improvements would make them visit Market Harborough town centre more often. The most mentioned improvements relating to accessibility to the centre and mobility/movement around the centre were the suggestion that parking is made free (8.9%) or cheaper (6.2%), reduced traffic congestion and

improved access (5.1%), increasing the availability of parking spaces (4.5%). Only 0.8% suggested improvements to bus services suggesting general satisfaction. Overall, accessibility to Market Harborough's town centre is good, but the cost of car parking has the highest levels of dissatisfaction.

Environment and Ambience

- A1.32 Market Harborough is an attractive historic market town with some quality period buildings and interesting historical landmarks. A Conservation Area covers the PSA except for St Mary's Place Shopping Centre. Church Square and Church Street form an especially attractive area centred around the historic St Dionysius Church and the Old Grammar School, with the Harborough Theatre and Museum creating a cultural centre for the town. In the south of the centre the River Welland is an asset incorporated into the town's urban design, with riverside Memorial Gardens and attractive walkways connecting to The Commons car park and St Mary's shopping centre. The centre does however suffer from heavy through-traffic and congestion at peak times, especially at The Square.
- A1.33 Of the household survey respondents who had visited Market Harborough town centre in the past year, the attractiveness of the environment was the most liked attribute (33.3%). The quality of the public realm is generally good. The High Street has mature trees in some locations and frequently placed planters are well maintained. There is plenty of quality seating and public toilets are available which contributes to inclusive use of the centre. There are signs of recent investment with updates to shop façades and new businesses, such as Pret a Manger and Lakeland advertising their arrival.
- A1.34 The Square is a vibrant focal point with a good quality public realm, space for a market, and some outdoor café seating. It is also the site of a small bus interchange. The indoor Market further southeast, on Northampton Road, is well-maintained and vibrant, with stalls selling a wide variety of interesting goods.
- A1.35 St Mary's Place shopping centre is showing some signs of wear, with poor drainage and cracked paving. There is a relatively high concentration of vacancies here, including the large unit previously occupied by Wilko, undermines the vitality of this area. This area connects to the Sainsbury's store and is an important link which helps to encourage convenience shoppers to visit the town centre.
- A1.36 As indicated above, there were particularly high levels of satisfaction compared with dissatisfaction with the quality of the environment. Other significant draws to Harborough were its nice atmosphere/friendly people (12.1%), the range of non-food shops (12%) and the layout, with visitors liking the compact nature of the centre (8.5%).
- A1.37 The only improvements to Market Harborough's environment suggested by survey respondents related to reducing the number of empty shops (5.4%), with others responding to the retail offer, most significantly a desire for more/better clothes shops (11.4%). Cleanliness and maintenance and safety in the town centre was generally viewed more positively than negatively, as shown in Figure M1.
-

Occurrence of Crime

- A1.38 Market Harborough has a low crime rate of 72 crimes per 1,000 people, lower than the Leicestershire average of 89 per 1,000 and ranking the safest medium-sized town in the County (Crimerate.co.uk).
- A1.39 In March 2024, 36 crimes were reported within Market Harborough's town centre (Police.uk). The majority of these took place on Church Street (10), with eight reported near Sainsbury's. The majority of offences were theft-related (12), especially near Sainsbury's where five instances of shoplifting/theft were reported. There were nine instances of violence/sexual offences and six instances of anti-social behaviour. In February 2024 a total of 20 crimes were reported, and 35 in January 2024, suggesting the figure for March was not an anomaly.
- A1.40 Crime was not a significant issue raised by survey respondents. Whilst 2% of respondents who visited Market Harborough town centre commented positively on safety, only 1.2% suggested it needed improving. This indicates that crime is a fairly neutral issue in Market Harborough and perceived safety is good, reflecting the non-violent nature of most crimes reported in March 2024.

SWOT Analysis

Market Harborough's Strengths

- Market Harborough is an attractive historic market town which benefits from interesting period buildings and historic landmarks. It has a good quality public realm and a fine urban grain. It has a compact layout with natural pedestrian circuits.
- Market Harborough's range of comparison shops, including national multiples and independent shops, food and beverage offer, cultural offer and attractive public realm makes it a destination for households across the District.
- There is a selection of large food stores suitable for both main and top-up food and grocery shopping.
- The shop vacancy rate is much lower than the national average, suggesting good demand for shop units. This is reflected in its shop rental values, which are the highest in the District.
- Market Harborough benefits from good national rail links and local buses which bring shoppers from a wide rural catchment area.
- There is adequate off-street parking with some conveniently located on-street parking within the centre.

Market Harborough's Weaknesses

- Bus stops are concentrated in the southern portion of the centre. Although this is where retail use is concentrated, it may discourage visitors to other shopping streets.
 - Some areas are showing signs of wear, in particular at St Mary's Place shopping centre.
 - A cluster of vacancies in the southeastern part of St Mary's Place undermines the vitality and viability of this area.
-

- Traffic is consistent through the centre, resulting in some congestion and constraints to pedestrian movement.
- Parking charges result in relatively high levels of visitor dissatisfaction.

Market Harborough's Opportunities

- Expenditure and population growth in the future should provide opportunities to improve the range and choice of shops and services.
- There is the opportunity to capture more customers visiting the supermarkets and retail parks to the edge of the town centre. More customers from Sainsbury's could be drawn into the town centre by improving St Mary's Place.

Market Harborough's Threats

- The vacancies at St Mary's shopping centre include some large units which may be more difficult to fill. Several vacancies in the main town centre are banks, which may also remain vacant due to relatively high conversion costs to other use.
- Supermarkets and retail parks located outside of the town centre may continue to reduce trade in the town centre.

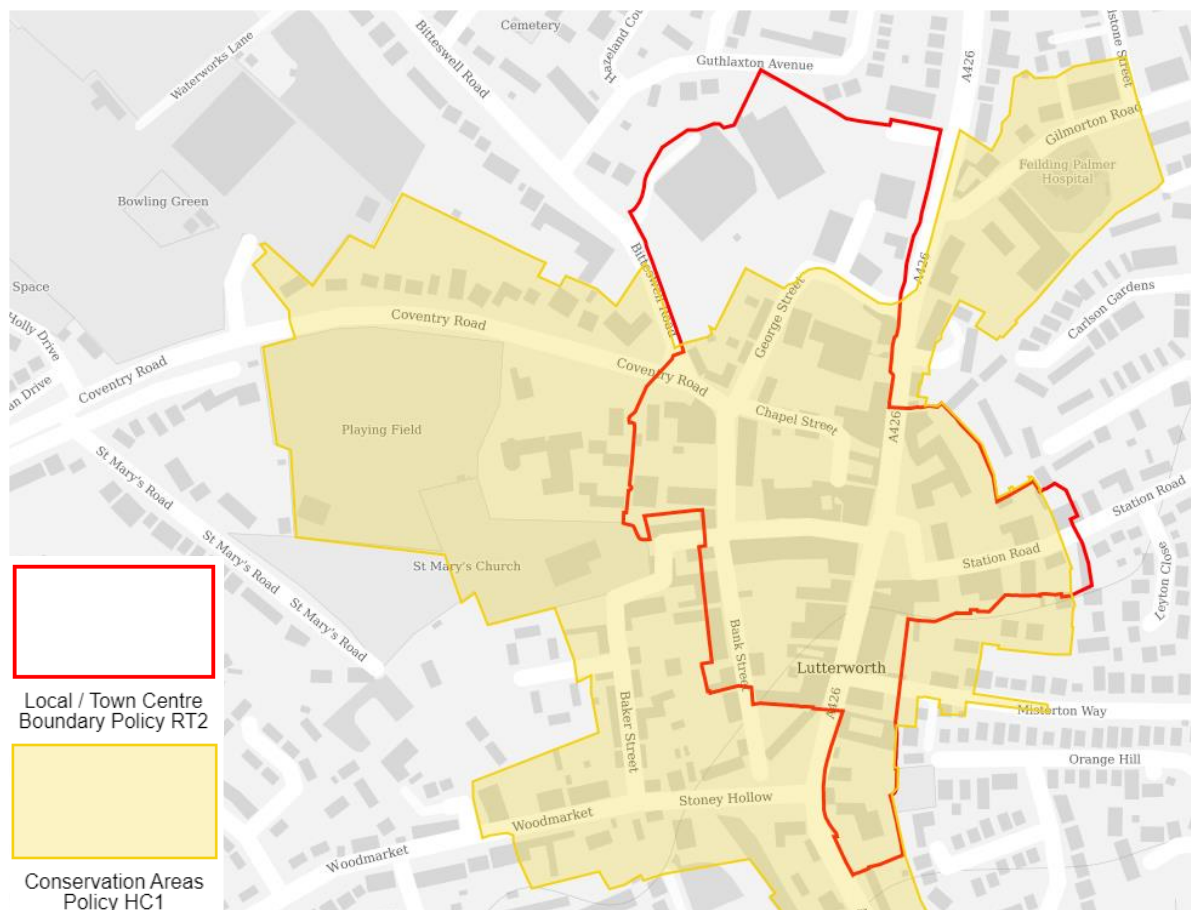
Conclusions

- A1.41 Market Harborough is an attractive market town with a good mix of shops and services for a centre of its size. It has retained a reasonably strong comparison goods retail offer including a mix of national multiples and independent traders. The centre appears to be performing well and is considered to be vital and viable, with a relatively low shop vacancy rate.
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LUTTERWORTH TOWN CENTRE

A1.42 Lutterworth is the second biggest centre in Harborough, located in the west of the District, 15-minute drive time to Rugby, and approximately 30 minutes to Leicester and Coventry. It predominantly serves the western area of Harborough. Magna Park, a major distribution centre, is located to the west of the settlement. There is an industrial park in the north of the town adjacent to the M1. Outside of the centre, there is a Co-op to the west and an Aldi to the south. The town centre is located in the southern corner of the town and is within a Conservation Area. It is linear in form, stretching approximately 225 metres along Market Street and the High Street. The town centre boundary (red line on the plan below) includes the Morrisons and Waitrose stores at the northern end of the centre. Church Street is the second main street, branching west. George Street has a lower concentration of town centre uses but forms a circuit from Church Street back to Market Street. There are further retail and service units on the upper portion of Bank Street connecting to Church Street, and Station Road and Bell Street to the east of the High Street / Market Street. Lutterworth has a good range of retail and service uses.

Figure L1 – Lutterworth town centre boundary - Harborough Local Plan 2011-2031 Proposals Map



Mix of Uses

A1.43 Lutterworth town centre has 100 retail and service units, significantly less than Market Harborough's 278 units. The mix of uses is set out in Table L1, which is compared with the

District and UK averages. There were 8 vacant units within the centre at the time of the Lichfields' 2024 land use survey, equating to a shop vacancy rate of 8%, which is significantly below the UK average but higher than Market Harborough's rate of 6.5%. In 2012 Lutterworth had a similar number with 7 vacant units.

Table L1 - Mix of retail and service uses – Lutterworth town centre

Type	Number of units	% units	% units District average	% units UK average
Convenience retail	9	9.0	9.7	9.5
Comparison retail	29	29.0	34.2	27.7
Financial / professional	12	12.0	10.6	8.5
Restaurant / café	8	8.0	9.9	10.0
Public house / bar	5	5.0	4.0	4.9
Hot food takeaway	8	8.0	5.9	6.2
Other non-retail services	21	21.0	18.0	19.3
Vacant units	8	8.0	7.6	13.9
Total	100	100.0	100.0	100.0

Source: Lichfields' land use survey May 2024 and Goad Plan UK average.

- A1.44 The composition and mix of uses in Lutterworth town centre broadly reflects the national average, except for its above average provision of financial/professional services. It has a marginally lower provision of restaurant/cafes, and a slightly higher provision of comparison retail, hot food takeaways and non-retail services compared to the national average. This provision is broadly in line with the District average. The provision of convenience goods outlets is slightly below the national average, but this includes the large Waitrose and Morrisons stores. A more detailed breakdown of comparison goods retail outlets and non-retail services is shown in Tables L2 and L3.
- A1.45 Lutterworth town centre has 29 comparison goods retail shops, significantly less than Market Harborough (112 units). Consistent with national trends, Lutterworth has also seen a decline in the number of comparison units, from 39 in 2012. The biggest losses were in books, arts, cards and stationers (7 units) and electrical, music and photography (3 units). Despite this reduced representation, Lutterworth still has a reasonable range of comparison goods shops, with 13 of 14 Goad Plan shop categories represented, as shown in Table L2. There is however limited choice, with most categories having between only one to three outlets. Lutterworth has three charity shops. There are few national multiple retailers, as set out in Table L4. Lutterworth's comparison retail offer is mainly small independent outlets.
- A1.46 Compared with the retail offer, Lutterworth has a larger range and choice of non-retail services (54 units), as shown in Table H3. Its food offer is slightly below the UK average, but its provision of public houses/bars is higher than the District and UK averages, which suggests it has a strong evening economy. Its provision of hairdressers and beauty parlours is higher than the UK average, but below the average for the District. There is also a selection of financial services and estate agents / valuers. This includes two banks, one of which is a banking hub where five banks share the same unit and operate on different days. Other leisure and community uses include the Lutterworth and District Museum, Lutterworth Library, Greyhound Coaching Inn, medical clinics and a martial arts academy.

Table L2 - Mix of comparison goods retail uses – Lutterworth town centre

Type	Number of units	% units	% units District average	% units UK average
Clothing and footwear	2	6.9	22.2	21.1
Furniture, carpets and textiles	3	10.3	7.4	7.5
Books, arts, cards and stationers	2	6.9	6.2	6.2
Electrical, music and photography	1	3.4	6.2	9.3
DIY, hardware and homeware	2	6.9	8.0	7.0
China, glass and gifts	4	13.8	6.8	5.7
Cars, motorcycles and accessories	0	0.0	0.6	1.2
Chemists, drugstores and opticians	4	13.8	15.4	12.1
Variety, department and catalogue	1	3.4	1.2	1.6
Florists, nurserymen and seedsmen	1	3.4	2.5	2.2
Toys, hobby, cycle and sports	2	6.9	3.7	5.5
Jewellers	1	3.4	4.9	5.1
Charity and second-hand shops	3	10.3	9.3	9.9
Other comparison goods retailers	3	10.3	5.6	5.6
Total	29	100.0	100.0	100.0

Source: Lichfields’ land use survey May 2024 and Goad Plan UK average.

Table L3 - Mix of non-retail service uses – Lutterworth town centre

Type	Number of units	% units	% units District average	% units UK average
Restaurant / café	8	19.0	23.4	24.6
Hot food takeaway	8	19.0	13.9	22.0
Public house / bar	5	11.9	9.5	11.4
Bank / other financial service	6	14.3	9.5	11.3
Betting shop / amusement	1	2.4	1.5	6.7
Estate agent / valuer	3	7.1	10.0	6.2
Travel agent	1	2.4	1.5	1.1
Hairdresser / beauty parlour	9	21.4	29.9	15.5
Launderette / dry cleaner	1	2.4	1.0	1.1
Sub-total	42	100.0	100.0	100.0
Other non-retail services	12			
Total	54			

Source: Lichfields’ land use survey May 2024 and Goad Plan UK average.

Table L4 - Multiple retailers – Lutterworth town centre

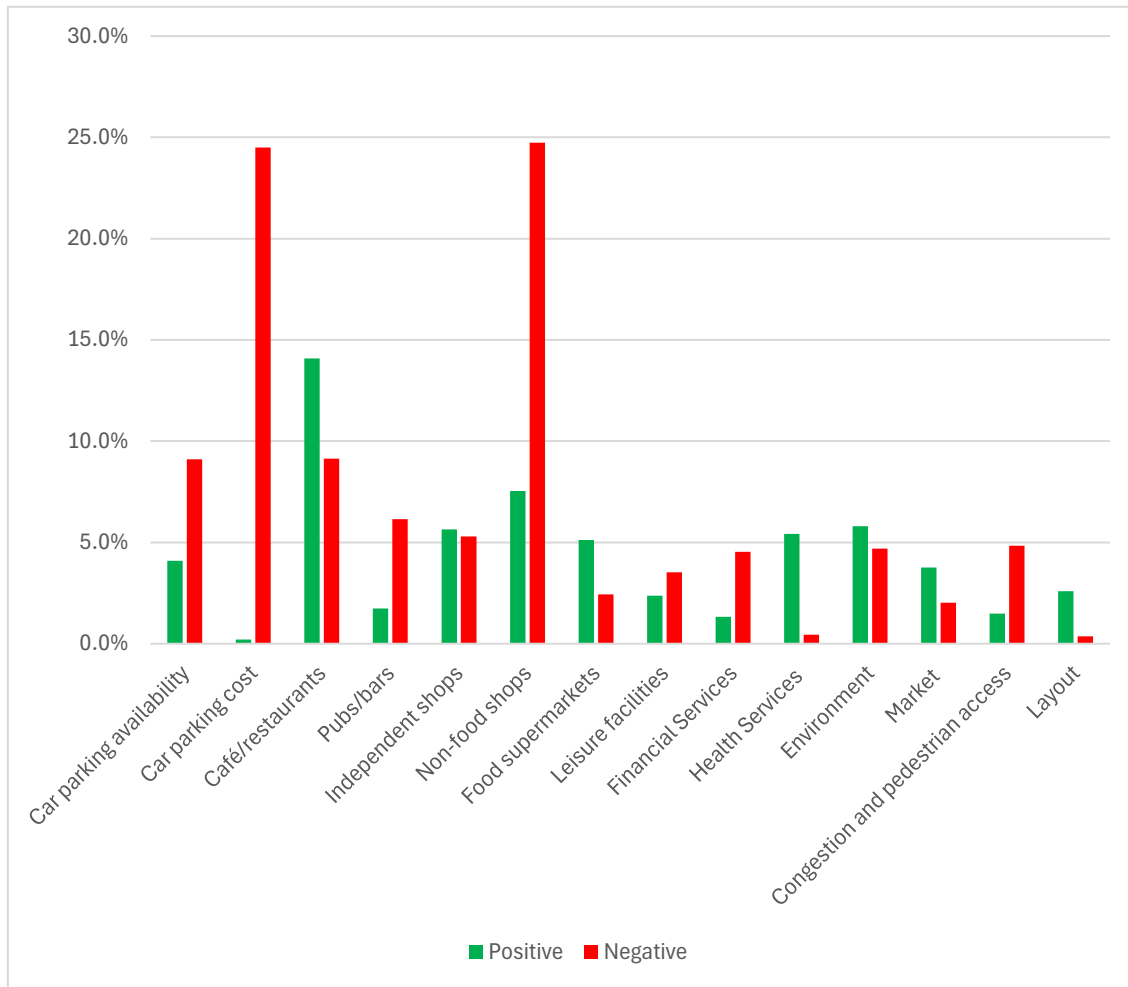
Comparison		Convenience	Food and Beverage
Max Electrical	LOROS	Morrisons	Costa
Edmonds and Slatter	Age UK	Waitrose	Domino’s
Scrivens	Blood Cancer UK		Subway
Specsavers			
The Original Factory Shop			

Source: Lichfields’ land use survey May 2024

Customer views

A1.47 Around 30% of respondents in the study area had visited Lutterworth town centre. Of those who had used shops/services in Lutterworth, respondents were asked what they liked about the town centre and what improvements would make them visit more often. These factors are compared in figure L2 below.

Figure L2 - Positive and negative factors visitors mentioned about Lutterworth town centre (% of all Lutterworth visitors)



Source: NEMS household survey April 2024

A1.48 The survey results are mixed. Car parking cost and the provision of non-food shops were the aspects viewed most negatively by respondents. Some aspects had mixed opinions, but there were higher levels of satisfaction than dissatisfaction with Lutterworth’s provision of cafés/restaurants, food supermarkets, health services, but only marginally positive on the number of independent shops, the market, and the environment. Though the environment overall was viewed marginally more positively, as well as the layout, congestion and pedestrian access was identified as a negative factor. Car parking availability, the provision of pubs/bars, leisure facilities and financial services also had slightly higher levels of dissatisfaction.

A1.49 Overall, taking the issues mentioned by more than 10% of respondents, views on Lutterworth were more negative than positive. Satisfaction is generally lower than in Market Harborough. The cost of car parking and the availability of non-food shops are the main issues raised, although cafés/restaurants are viewed more positively.

Customer activities and catchment Area

A1.50 Of the 30% of study area respondents who had visited shops, services or leisure facilities in Lutterworth town centre during the last year, the majority of visitors came from the local Lutterworth area – Zone 1, with high proportions also coming from Zone 2 – Broughton Astley/Fleckney. Overall, Lutterworth attracts more visitors than Broughton Astley (11%) but significantly fewer than Market Harborough (79%). This affirms its position in the shopping hierarchy.

A1.51 The average length of stay for household visiting Lutterworth was 69 minutes, which was higher than Broughton Astley (46 minutes) but lower than Market Harborough (99 minutes).

A1.52 Only 1.7% of households in the study area do most of their non-food shopping in Lutterworth town centre. This is still higher than Broughton Astley (0.5%), but significantly lower than Market Harborough (21.3%). Some respondents indicated that they chose Lutterworth's supermarkets for their non-food shopping, with 1.9% going to Waitrose, 1.0% to the Morrisons, and 1.1% going to the edge of centre Aldi. These results suggest Lutterworth town centre is not a particularly significant destination for non-food shopping.

A1.53 Survey results suggest good performance of the central Morrisons and Waitrose as anchor stores for the centre. Around 6% throughout the survey area reported doing their main grocery shop at the central Morrisons, and 3.8% the Waitrose, but 4.8% reported utilising the out-of-centre Aldi. Of those that reported grocery shopping was part of a linked trip (35% of all households), 7.3% said this took place in Lutterworth's town centre, which is much lower than Market Harborough's figure of 32.8%, but higher than Broughton Astley (0.9%).

A1.54 The breakdown of activities undertaken by visitors to Lutterworth town centre is shown and compared with the average for the District in Table H5. The centre has a higher than average proportion getting petrol, using health facilities and visiting the centre for other service uses.

A1.55 Lutterworth also has a higher proportion visiting the centre to meet family/friends, for trips connected to the school run / for work. As the second-biggest centre, the proportion of people visiting for non-food shopping and cafes/restaurants is lower than that of Market Harborough, but higher than the District average.

A1.56 The retail capacity analysis suggests Lutterworth has a comparison goods turnover of £25.85 million in 2024, the second highest of all destinations in the District. It attracts 58% of its comparison goods trade from the local Lutterworth Zone 1. Lutterworth attracts nearly all its trade from the west of the District.

Table H5 - Activities carried out by visitors to Hitchin town centre (% of all visitors to each centre)

Activity	Lutterworth	Average for all centres
Shopping		
Non-food shopping	47.0	36.6
Food shopping	53.6	56.3
Window shop/browse	8.6	5.2
Visting the market	5.9	2.4
Leisure		
Go for a walk	4.3	5.5
Café/pub/restaurant	28.1	26.9
Leisure activity	11.6	10.5
Other services		
Banks/other financial institutions	1.4	1.8
Health facilities	18.5	16.4
Library	3.5	4.3
Getting petrol	4.7	2.4
Post office	6.1	9.4
Other service uses	9.9	8.2
Other activities		
Travelling to/from work	7.0	3.4
Education/school run	7.6	1.6
Visting family/friends	11.4	8.8

Source: NEMS household survey April 2024. * percentages add to more than 100% dues to multiple activities.

Rental Levels

- A1.57 Data from the Valuation Office Agency (VOA) shows that Lutterworth has shop rental values of £300 per sq.m., with the highest values on Church Street and adjoining Bell Street. This is higher than Broughton Astley (£240 per sq.m.) but significantly lower than Market Harborough (£630 per sq. m). Along the main thoroughfares of the High Street and Market Street, values vary between £190-£250 per sq.m., with similar values on George Street. Values on Bank Street and Station Road are suppressed by their poor connectivity to the High Street, ranging between £175-£215 per sq.m. and decreasing with distance from the centre.

Accessibility

- A1.58 Lutterworth does not have a railway station. There are several centrally located bus stops, at the northern end of Market Street, George Street adjacent to the Morrisons Car Park and George Street car park, and on the High Street by the Banking Hub. Services link the centre to Hinckley, Burbage and Magna Park (8), Leicester and surrounding villages (84/85), Leicester, Blaby and Magna Park (X45), and Leicester, Broughton Astley, Narborough and Rugby (X84). Bus stops are generally well maintained and marked with up-to-date information.
- A1.59 Lutterworth's town centre is served by eight main car parks. Free parking (around 12 spaces) is located at Wycliffe Church car park on Bitteswell Road, close to George Street.

Morrisons car park is around £1 for two hours of parking, and is well connected via pedestrian footway to George Street. Customer parking is also available at the Original Factory Shop. Other council-run car parks follow the same charging regime:

- Up to 1 hour £1; Up to 2 hours - £1.50; Up to 3 hours - £2; Up to 4 hours - £3; Over 4 hours - £5. Charges in effect 7am-6pm Monday-Saturday.

A1.60 The number of spaces and type is set out below. All are short stay car parks.

Table L6 Lutterworth Car Parks

Car park	Spaces
Chapel Street	6x 30 min free spaces 45x pay and display 1x disabled space 4x motorcycle
Church Close	18x pay and display 1x motorcycle
George Street	6x 30 min free spaces 44x pay and display 2x disabled spaces
Station Road	6x 30 min free spaces 95x pay and display 3x disabled spaces

Source: Harborough District Council

- A1.61 Pedestrian accessibility in the centre could be improved, although pavements are in reasonable condition, with some cracking and signs of wear. A key issue is a lack of crossing points along the High Street / Market Street, with heavy traffic flow creating an unpleasant environment. Pedestrian flows are relatively light along the High Street / Market Street, when compared with flows in Market Harborough. Footfall is limited at the northern and southern ends of this central spine as well as at Bank Street and Station Street, as there are no natural circuits and retail/service uses taper off along the street.
- A1.62 Church Street has the highest pedestrian flows. George Street and Chapel Street form a circuit from Church Street, linking to the Morrisons/Waitrose car park and the northern end of Market Street. Access from this area to the marketplace and Bell Street opposite is severed by the busy Market Street.
- A1.63 Of the household survey respondents who had visited Lutterworth town centre in the past year, the proximity of the centre to home was the most liked attribute (31.8%). In relation to accessibility, respondents mentioned factors liked as follows: easy to get there by car (5.4%), easy to find a parking space (3.9%); and easy to get there on foot (1.5%).
- A1.64 As indicated earlier, car parking cost in Lutterworth attracted the most negative views from survey respondents. Respondents were asked what improvements would encourage them to visit more often. The most mentioned issue was the cost of parking, with 20.8% suggesting it be made free. A further 3.7% suggested making it cheaper. Although 4.1% commented positively on the availability of parking, 9.1% were dissatisfied. Lutterworth’s availability of free parking is limited, and its main car parks follow a similar charging regime as Market

Harborough. There were similar levels of dissatisfaction with the cost of parking in Market Harborough.

- A1.65 Other suggestions relating to accessibility were improvements to bus connections to the centre (2.3%); reduce traffic congestion (2.3%); make it easier to get to by car (1.3%), and add more road crossings and safe walkways (1.2%). Car parking cost was the only accessibility issue attracting significant comment.

Environment and Ambience

- A1.66 Lutterworth's environment varies. Church Street is an attractive and vibrant street with signs of recent investment including bunting and refurbishment to shops. St Mary's Church at the end of the street is a key landmark, with the Lutterworth Memorial Garden an important focal point with seating and high-quality landscaping contributing to the ambience.
- A1.67 There are some attractive historic buildings throughout the centre, such as the Town Hall and period buildings on the High Street. Others are less attractive and showing signs of wear, for example the parade on Bell Street where prominent security cameras contribute to an unwelcoming atmosphere. When in operation, the market at Bell Street / Market Street injects vitality into an otherwise underutilised area. Along Market Street and the High Street, the ambience is negatively impacted by heavy traffic flows. Street furniture including bollards and waste bins are showing signs of wear, and patchwork repairs to paving have negatively impacted the appeal of some areas. There are opportunities to improve landscaping.
- A1.68 There are some underutilised areas such as the alley behind the Town Hall, and the forecourt outside the library. There are several vacancy clusters to the north of Market Street. In this area retail/service uses are fragmented, with larger units such as the Original Factory Store and the car park at Chapel Street creating a coarse urban grain.
- A1.69 As indicated earlier, Lutterworth has only slightly higher levels of satisfaction compared with dissatisfaction with the quality of the environment (5.8% compared with 4.7%). Additionally, 4.8% of visitors suggested improvements to congestion and pedestrian friendliness in the centre would encourage them to visit more often.

Occurrence of Crime

- A1.70 Lutterworth has a low crime rate of 69 per 1,000 people, lower than Market Harborough (72 per 1,000) and the Leicestershire average (89 per 1,000) (Crimerate.co.uk). Data from Police.uk shows that 25 crimes were reported within Lutterworth town centre in March 2024. Reported crimes were concentrated to the northwest and southwest of the centre, with only two occurring in the central area along the High Street. The majority of crimes were theft-related (11), with a hotspot of seven occurring at Waitrose/Morrisons at the northwest of the centre. There were six instances of criminal damage/arson, with five of these occurring along Bank Street. In February 2024 there were 17 crimes reported, and in January 2024, only 9. This suggests that March 2024's figure of 25 is a high point.
- A1.71 Lutterworth has a similar pattern to Market Harborough of shoplifting occurring in town centre supermarkets. Instances of criminal damage/arson have not impacted perceived
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safety – no respondents suggested improvements needed to be made in relation to safety and crime. Only one respondent commented positively on the safety of the environment.

SWOT Analysis

Lutterworth's Strengths

- Lutterworth benefits from some attractive historical buildings and areas of high-quality public realm along Church Street, including the Lutterworth Memorial Garden. Space for a market brings vitality to the centre.
- Lutterworth has a reasonable range of comparison retail and service units. It has a broad range of services, including a banking hub.
- The Morrisons and Waitrose food stores are suitable for both main and top-up food and grocery shopping.
- The centre has good bus services, with well-located bus stops and local connections. There is good provision of car parking with some free parking.
- There is a good range of independent businesses.
- The vacancy rate is much lower than the national average which suggests demand for premises is relatively good.
- The Banking Hub enables multiple banks to maintain a presence in the town centre, preserving banking/finance as a town centre use, benefitting diversity.

Lutterworth's Weaknesses

- In parts of the centre the environmental quality is relatively poor. Some buildings require maintenance and refurbishment.
- There are few national multiples, indicating Market Harborough, Leicester and Rugby are the focus for retailers and shoppers. Respondents to the household survey were dissatisfied with the choice of non-food shops.
- The town centre is fragmented in places with residential uses diluting its retail and service offer along George Street and the northern section of Market Street. A coarser urban grain and cluster of vacancies in the northern portion of the centre undermines vitality.
- Although George Street and Church Street provide pedestrian circuits, there are few retail/service outlets available. Pedestrian flows are more limited on the minor shopping streets.
- Heavy traffic flow along the High Street / Market Street severs the centre, with a lack of pedestrian crossings. This contributes to an unpleasant shopping environment.
- Lutterworth has no train station.
- Parking charges result in relatively high levels of visitor dissatisfaction.

Lutterworth's Opportunities

- There is an opportunity to improve the public realm to create a more attractive environment. There is underutilised space at the Lutterworth Library forecourt. The
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marketplace and shops along Bell Street would benefit from cosmetic improvements, including to paving and landscaping.

- Improving the crossings at the High Street / Market Street or the introduction of traffic calming measures would improve the ambience, pedestrian safety, and reduce the effects of this main road as a dividing line between the eastern and western sections of the centre.
- Lutterworth East is a Strategic Development Area for around 2,750 houses over the next 20 years. This has the potential to increase support for Lutterworth's town centre.

Lutterworth's Threats

- Lutterworth's town centre is entirely within a Conservation Area, and there are several listed buildings. This could restrict the growth of the centre and deter new operators due to the constraints on expanding / amending units.
- Expansion to the town may compound the issue of high traffic flows through the centre.
- A low vacancy rate limits opportunities to accommodate new occupiers.

Conclusions

A1.72

Lutterworth is a reasonably attractive small town. It has a more limited range and choice of shops and services than Market Harborough. The centre has a reasonable range of comparison goods shops but the choice within each category is limited. The centre offer is predominantly small independent traders rather than national multiples. The centre appears to be performing satisfactorily and is vital and viable, with a relatively low shop vacancy rate.

BROUGHTON ASTLEY DISTRICT CENTRE

A1.73

Broughton Astley is a designated District Centre in the northwest of Harborough, serving a medium-sized rural catchment area and the local needs of its population. It is six miles north of Lutterworth and nine miles southwest of Leicester with good road access to Hinckley, Blaby and Fosse Park Shopping Centre near Leicester. Broughton Astley is formed of two main residential areas, the northwestern section and the southeastern section, with a central playing field, a Leisure centre and the Old Mill Primary school dividing the two. The Cottage Lane industrial estate is to the northeast of this central area, with an adjacent Aldi. The defined district centre is located in the northwestern portion of the settlement, with a newer small parade of shops in the southeastern portion of the settlement on Devitt Way, and a few pubs and minor businesses throughout the settlement. Its defined shopping and business area (red line on the plan below) forms a compact centre with a range of service, food/beverage and retail units. The central Co-Op supermarket is the anchor for the centre, with car parking at the adjacent Orchard Road. Main Street is approximately 200 metres in length. Green Road functions as a secondary circuit, with a war memorial marking the traditional village centre.

Figure B1 – Broughton Astley District Centre – Shopping and Business Area



Source: Harborough District Council

Mix of Uses

A1.74 Broughton Astley has 45 retail and service units within its designated centre, excluding leisure, office, community and medical uses. The number of units appears to have reduced by about four since 2012. The mix of uses is set out in Table L1, which is compared with the District and UK averages. There were 7 vacant units within the centre at the time of the Lichfields' 2024 survey, equating to a shop vacancy rate of 15.6%, which is above the District and UK averages. The number of vacant units has increased from only three in 2012. However, some of these vacant units appear to be under offer. The high vacancy rate may suggest that Broughton Astley's centre has been impacted by Covid-19, the cost of living crisis and/or out-of-centre retail developments.

Table B1 - Mix of retail and service uses – Broughton Astley centre

Type	Number of units	% units	% units District average	% units UK average
Convenience retail	4	8.9	9.7	9.5
Comparison retail	9	20.0	34.2	27.7
Financial / professional	5	11.1	10.6	8.5
Restaurant / café	3	6.7	9.9	10.0
Public house / bar	1	2.2	4.0	4.9
Hot food takeaway	3	6.7	5.9	6.2
Other non-retail services	13	28.9	18.0	19.3
Vacant units	7	15.6	7.6	13.9
Total	45	100.0	100.0	100.0

Source: Lichfields' land use survey May 2024 and Goad Plan UK average.

- A1.75 Broughton Astley's offer is primarily non-retail services, with a lower than average provision of comparison retail units. Its food and beverage offer is also below District and UK averages, except for hot food takeaways.
- A1.76 With only 9 comparison goods retail shops (20.0%), it has the lowest proportion in the District, behind even the proportion within the combined local centres (24.0%). The number of comparison units has declined since 2012, from 16 to only 9. It has lost its only clothing and footwear outlet, with other significant losses in furniture, carpets and textiles (2 units); and china, glass and gifts (2 units). The range of comparison good shops is limited, with only seven of the 14 Goad Plan shop categories represented, as shown in Table B2. There is only a choice of outlets for DIY/hardware, and chemists and opticians. Broughton Astley has only one national retailer, the Co-operative. Its comparison retail offer is independent shops only.
- A1.77 Broughton Astley's range of non-retail services (25 outlets) differs from the District and UK average, as shown in Table L3. Half of services in Broughton Astley are hairdressers / beauty parlours, significantly above the District average of 29.9% and over three times the national average of 15.5%. It has a good choice of estate agents/valuers, but below average provision of banks/financial services and food and beverage. It has one building society. There are no travel agents or betting shops/amusements. Other uses include a chiropractor and personal training facility, as well as a Library.

Table B2 - Mix of comparison goods retail uses – Broughton Astley District Centre

Type	Number of units	% units	% units District average	% units UK average
Clothing and footwear	0	0.0	22.2	21.1
Furniture, carpets and textiles	1	11.1	7.4	7.5
Books, arts, cards and stationers	1	11.1	6.2	6.2
Electrical, music and photography	0	0.0	6.2	9.3
DIY, hardware and homeware	2	22.2	8.0	7.0
China, glass and gifts	0	0.0	6.8	5.7
Cars, motorcycles and accessories	1	11.1	0.6	1.2
Chemists, drugstores and opticians	2	22.2	15.4	12.1
Variety, department and catalogue	0	0.0	1.2	1.6
Florists, nurserymen and seedsmen	1	11.1	2.5	2.2
Toys, hobby, cycle and sports	1	11.1	3.7	5.5
Jewellers	0	0.0	4.9	5.1
Charity and second-hand shops	0	0.0	9.3	9.9
Other comparison goods retailers	0	0.0	5.6	5.6
Total	9	100.0	100.0	100.0

Source: Lichfields' land use survey May 2024 and Goad Plan UK average.

Table L3 - Mix of non-retail service uses – Broughton Astley District Centre

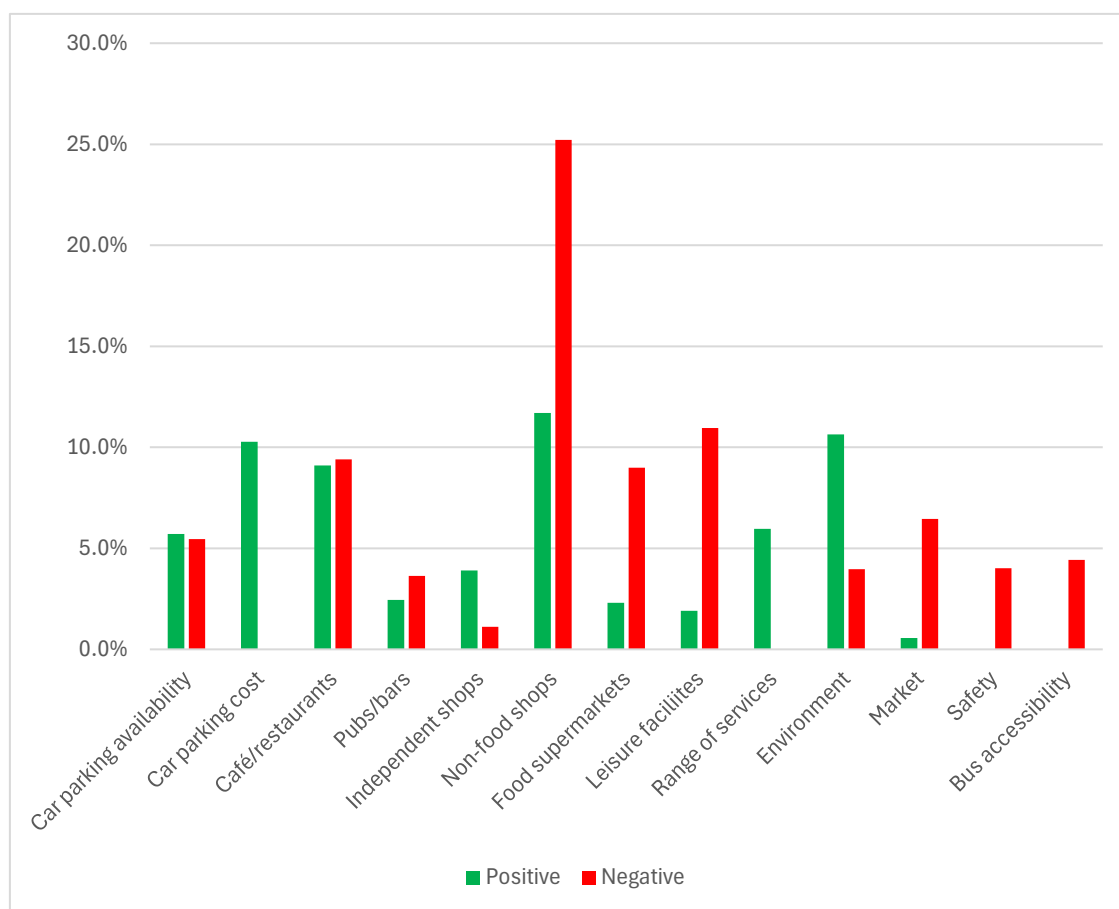
Type	Number of units	% units	% units District average	% units UK average
Restaurant / café	3	13.6	23.4	24.6
Hot food takeaway	3	13.6	13.9	22.0
Public house / bar	1	4.5	9.5	11.4
Bank / other financial service	2	9.1	9.5	11.3
Betting shop / amusement	0	0.0	1.5	6.7
Estate agent / valuer	2	9.1	10.0	6.2
Travel agent	0	0.0	1.5	1.1
Hairdresser / beauty parlour	11	50.0	29.9	15.5
Launderette / dry cleaner	0	0.0	1.0	1.1
Sub-total	22	100.0	100.0	100.0
Other non-retail services	3			
Total	25			

Source: Lichfields Land Use Survey 2024 and Goad Plan UK average.

Customer Views

- A1.78 Around 11% of respondents in the study area had visited Broughton Astley District Centre. Of those who had used shops/services in the centre, respondents were asked what they liked about the town centre and what improvements would make them visit more often. These factors are compared in figure B1 below.

Figure B2 - Positive and negative factors visitors mentioned about Broughton Astley centre (% of all visitors)



Source: NEMS household survey April 2024

A1.79 The survey results were mixed but the most important issue was the availability of non-food shops, which was viewed negatively by 25% of respondents. In terms of Broughton Astley’s offer, the provision of pubs/bars, food supermarkets, leisure facilities and the market were viewed negatively, but respondents felt positively about the range of services.

A1.80 Some aspects of Broughton Astley were viewed with mixed opinions: car parking availability and the provision of cafés and restaurants had similar levels of satisfaction to dissatisfaction. The environment was viewed positively, but improvements to safety were suggested. Congestion was not a significant issue, but accessibility by bus to the centre was viewed negatively.

A1.81 Compared with the other centres, visitors’ views on Broughton Astley were relatively neutral, with only around 10% or less of visitors mentioning each factor, except for the high proportion who felt negatively about the availability of non-food shops.

Customer activities and catchment area

A1.82 The 11% of survey respondents who had visited shops, services of leisure facilities in Broughton Astley’s district centre in the last year were mainly from Zone 2 – Broughton Astley / Fleckney, with some from Zone 1 - Lutterworth. Despite its position in the hierarchy as a District Centre, Kibworth Beauchamp – a Local Centre – received more

visitors, with 16% of respondents reporting visiting it in the last year. These results suggest Broughton Astley primarily serves the settlement itself and nearby surrounding villages.

- A1.83 The average length of stay for household visiting the centre was 46 minutes, which was below Lutterworth (69 minutes) and Market Harborough (99 minutes). This lower length of stay reflects Broughton Astley's low number of retail and food/beverage outlets.
- A1.84 Less than 1% of households in the study area do most of their other non-food shopping in Broughton Astley town centre. Broughton Astley's Aldi on Buxton Crescent was a more popular destination for non-food shopping, with 1.4% of respondents listing it as their main destination.
- A1.85 Only 0.1% respondents listed Broughton Astley's central Co-operative as their main food shopping destination. This suggests its role as an anchor store for the centre may be limited, as Aldi takes the main share of convenience shopping (4.4%). Additionally, of those who mentioned that their main food shopping was undertaken as part of a linked trip (35% of all households), only 0.9% said that this took place in Broughton Astley's centre, much lower than Lutterworth (7.3%) and Market Harborough (32.8%).
- A1.86 The breakdown of activities undertaken by visitors to Broughton Astley centre is shown and compared with the average for all four centres in Table B5. Activities are broadly in line with the District average, but with lower proportions visiting for cafés/pubs/restaurants, banks/financial institutions and a higher proportion visiting health facilities, the library undertaking leisure activities. This is in line with the centre's offer – i.e. there are fewer food/beverage outlets and a low proportion of comparison goods retail units.
- A1.87 The retail capacity analysis suggests Broughton Astley has a comparison goods turnover of only £2.24 million in 2024. It attracts 89% of its comparison goods trade from the local Broughton Astley/Fleckney Zone 2. Broughton Astley has a very localised catchment area.
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Table B5 - Activities carried out by visitors to Broughton Astley centre (% of all visitors to each centre)

Activity	Broughton Astley	Average for all centres
Shopping		
Non-food shopping	34.6	36.6
Food shopping	54.4	56.3
Window shop/browse	0.0	5.2
Visting the market	0.0	2.4
Leisure		
Go for a walk	0.6	5.5
Café/pub/restaurant	17.6	26.9
Leisure activity	13.2	10.5
Other services		
Banks/other financial institutions	0.4	1.8
Health facilities	26.4	16.4
Library	11.8	4.3
Getting petrol	2.1	2.4
Post office	7.1	9.4
Other service uses	10.1	8.2
Other activities		
Travelling to/from work	5.5	3.4
Education/school run	0.0	1.6
Visting family/friends	9.1	8.8

Rental Levels

- A1.88 According to the Valuation Office Agency (VOA), Broughton Astley's shop rental values for Zone A retail are £240 per sq.m, behind Kibworth Beauchamp (£250 per sq.m) and Lutterworth (£300 per sq.m). The highest values are along Main Street, ranging from £160-240 per sq.m. The more peripheral areas of Green Road and the southeastern section of Main Street range between £160-£190 per sq.m.

Accessibility

- A1.89 There are two bus stops on Orchard Road, which are within the town centre boundary but a short walk from the shops on Main Street. Buses connect Broughton Astley with Lutterworth and Leicester (84, 85). These services make multiple stops within Broughton Astley to connect residential areas with the centre. Survey respondents reported negative views about bus accessibility in Broughton Astley, with 4.4% suggesting improvements could be made.
- A1.90 Orchard Road car park adjacent to the Co-op provides free parking, with around 82 spaces. On-street parking is available throughout the centre. As indicated earlier, 10.3% of survey respondents were happy with the free parking in Broughton Astley, but visitors had mixed views on availability. Traffic flows are light through the centre and congestion was not an identified issue in the household survey.

A1.91 In relation to accessibility, other factors mentioned positively by survey respondents were as follows: close to home (27.5%), close to friends/relatives (8.2%) and easy to get there on foot (5.5%). In comparison to the larger town centres, Broughton Astley has higher proportions with positive views relating to access by foot, and proximity to home was the most mentioned factor.

Environment and Ambience

A1.92 Broughton Astley is a quiet centre with a pleasant environment. The majority of units are along Main Street, with few breaks in the frontage except for some prominent vacancies. Outdoor café seating adds vibrancy at the gateway to the centre on Main Street. Green Road forms a secondary circuit with service uses, the Conservative Club, a Turkish restaurant and a pub.

A1.93 Limited traffic flow through the centre allows for ease of pedestrian movement. The paving is reasonable and there has been some investment in landscaping. There may be an opportunity for further investment in more street furniture and planters, especially at the central green and war memorial on Green Road. Many visitors make use of on street parking, resulting in a cluttered street.

A1.94 As indicated earlier, survey respondents were generally satisfied with Broughton Astley's environment, with 10.4% reporting positive views, and 4% suggesting that improvements could be made.

Occurrence of Crime

A1.95 Broughton Astley's crime rate of 84 per 1,000 people is slightly higher than the towns of Market Harborough (72 per 1,000) and Lutterworth (69 per 1,000) (Crimerate.co.uk). This is still below the average for Leicestershire (89 per 1,000).

A1.96 Four crimes were reported in Broughton Astley's centre in March 2024, according to data from Police.uk. One instance of theft was recorded at the central Co-Op, with two instances of criminal damage / arson and one instance of anti-social behaviour recorded at the Petrol Station on Main Street. In February 2024 only one crime was reported, with two in January 2024. These figures suggest that crime is not an issue in the centre. Although these figures are very low, crime was raised in the household surveys, with 4% of respondents suggesting a need for improvements. This was the second highest figure of all the town centres.

SWOT Analysis

Broughton Astley's Strengths

- Broughton Astley is a compact centre with shop frontage concentrated along one main street. The secondary street of Green Road forms a pedestrian circuit and hosts restaurants and a pub. The centre has a pleasant shopping environment, with easy pedestrian movement and light traffic flows.
 - Broughton Astley has a good selection of hair and beauty outlets.
 - The local butchers and bakery consolidate Broughton Astley's image as a traditional village centre.
 - The centre has free parking with a large car park at Orchard Road and on-street opportunities.
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- Bus routes link the centre to surrounding residential areas, villages, and connect Broughton Astley to Lutterworth and Leicester.

Broughton Astley's Weaknesses

- The number of overall units in Broughton Astley is low for settlement of its size. Although the compact nature of the centre is a strength.
- The bus stops are not located along the main shopping street.
- The number of comparison shopping units is the lowest of the assessed centres in the District, and below the UK average. The choice and availability of non-food shops has declined since 2012.
- The proportion of vacant units is above the national average. Vacancies are visible in the centre.
- The centre has only one national multiple.
- There is limited diversity in its service offer, which is dominated by hairdressers / beauty parlours.

Broughton Astley's Opportunities

- Broughton Astley has a large population. There is an opportunity to capture leaked expenditure from the area by expanding its retail and service offer.
- The vacant premises in the centre provide an opportunity to accommodate new facilities. Rental levels are relatively affordable, lower than the smaller centre of Kibworth Beauchamp, which may help to attract new businesses.
- There is the opportunity to improve the war memorial area at Green Road into a more significant focal point for the centre.

Broughton Astley's Threats

- The Aldi was identified as a more significant destination for both food and to a lesser extent non-food shopping. It could continue to reduce the trading potential of the District Centre.
- Broughton Astley's proximity to larger shopping destinations such as Leicester, Fosse Park and Lutterworth may continue to limit its potential to grow.

Conclusions

- A1.97 Broughton Astley is a small district centre with a limited range and choice of shops and services when compared with Market Harborough and Lutterworth. The centre has a relatively small, localised catchment area. The centre has a relatively high shop vacant rate compared with the District and UK averages, which suggests the centre has declined to a greater extent over the last decade than Market Harborough and Lutterworth. The health and vitality of the centre appears to be more vulnerable than the tow town centres in the District.
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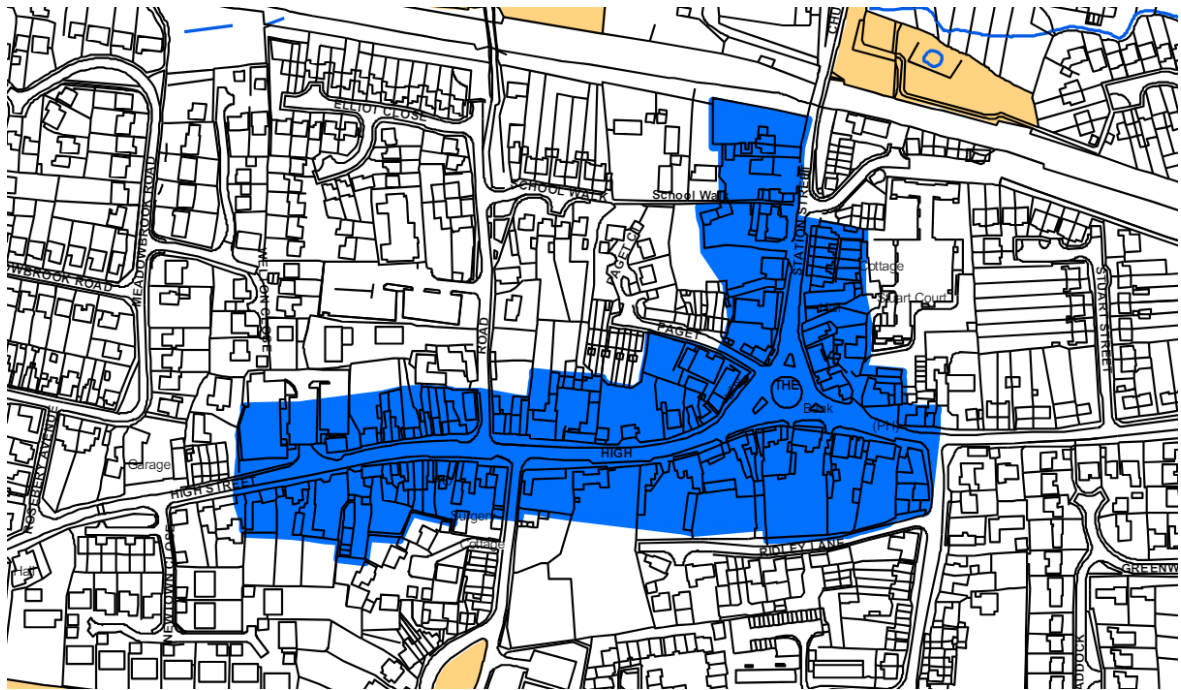
LOCAL CENTRES

A1.98 There are three designated Local Centres in Harborough District in Kibworth, Fleckney and Great Glen. These three Local Centres are close to the northwestern edge of Harborough, between 25 to 30 minutes drive time car from Leicester city centre. Great Glen is only a 10-minute drive from the centre of Oadby.

Kibworth

A1.99 Kibworth comprises the parishes of Kibworth Beauchamp and Kibworth Harcourt. Kibworth's Shopping and Business area is L-shaped in form (as shaded blue on the plan below), stretching approximately 350 metres east-west along the High Street, including portions of Station Street at the roundabout at its eastern end. Retail and services are concentrated in this area.

Figure LC1 – Kibworth Shopping and Business Area



Source: Harborough District Council

- A1.101 Kibworth's shop frontages are fragmented in places, with a gap in commercial uses in the central and eastern portions of the High Street, and a dominance of residential. Shops and services are also in low concentrations at the northern end of Station Street, with units adjacent to the bridge, previously offices, now vacant or in residential use.
- A1.102 Kibworth has 32 retail and service units within its Shopping and Business area, excluding leisure, office, community and medical uses. This is only slightly lower than Broughton Astley, which has 45 units (7 of which are vacant). The mix of uses is set out in Table LC1, which is compared with the District and UK averages. There were two vacant units at the time of Lichfields' survey in April 2024, equating to a shop vacancy rate of 6.3%, which is below the District and UK average. This suggests that provision is broadly in line with operator demand.

Table LC1 - Mix of retail and service uses – Kibworth Beauchamp Shopping and Business Area

Type	Number of units	% units	% units District average	% units UK average
Convenience retail	3	9.4	9.7	9.5
Comparison retail	10	31.3	34.2	27.7
Financial / professional	4	12.5	10.6	8.5
Restaurant / café	3	9.4	9.9	10.0
Public house / bar	2	6.3	4.0	4.9
Hot food takeaway	3	9.4	5.9	6.2
Other non-retail services	5	15.6	18.0	19.3
Vacant units	2	6.3	7.6	13.9
Total	32	100.0	100.0	100.0

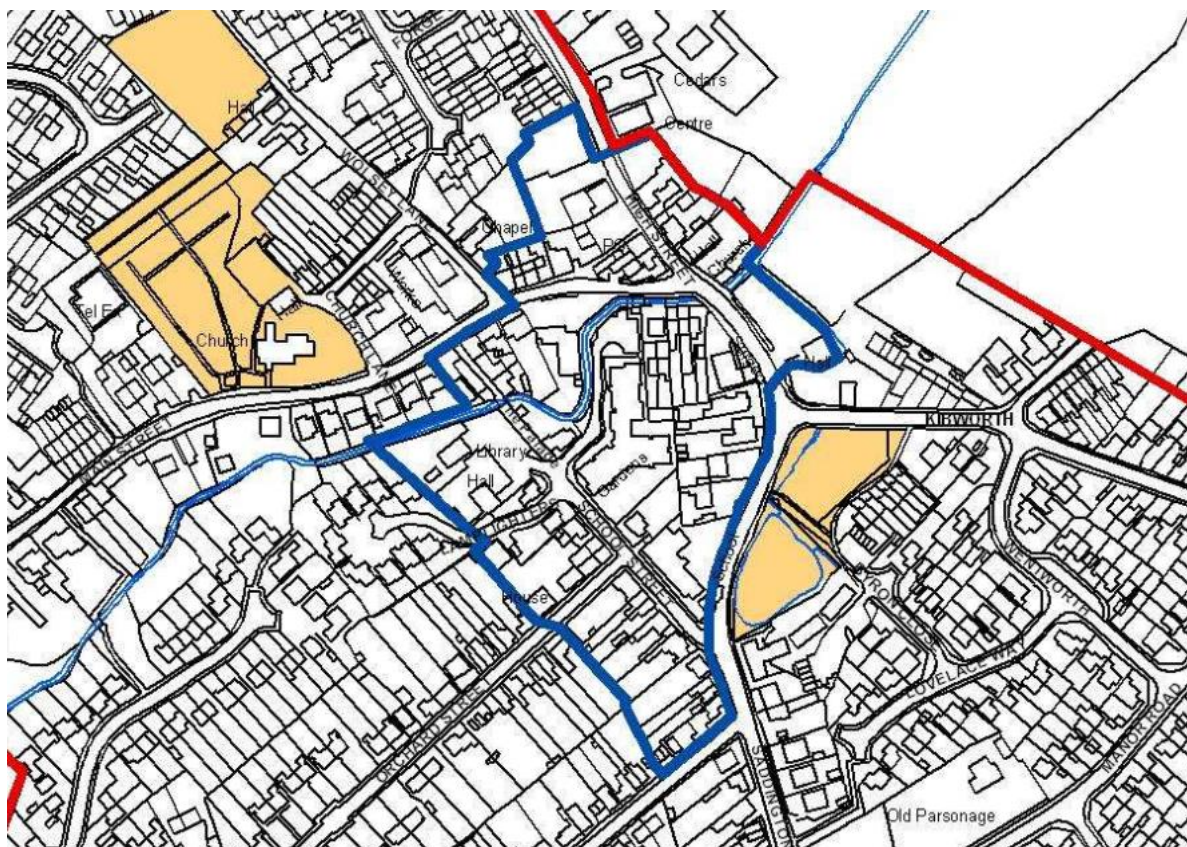
Source: Lichfields' land use survey May 2024 and Goad Plan UK average.

- A1.103 Kibworth has a strong comparison retail offer for a local centre. There is also an above-average provision of financial/professional services. The restaurant/café offer is in line with District and UK averages, but it has a higher proportion of public houses/bars and hot food takeaways. Its provision of non-retail services is below average.
- A1.104 Kibworth has a good selection of comparison shops for a centre of its size, and has more comparison retail shops than Broughton Astley District Centre (9). It also has a charity shop and an optician. The only national multiples represented in the centre are the Co-operative and Spar. Kibworth has a varied offer and the Goad categories represented include clothing/footwear; furniture, carpets and textiles; DIY, hardware and homeware, and books, arts, cards and stationers.
- A1.105 Kibworth has one building society and two estate agents. Its non-retail service offer is mainly hairdressers and barbers. Other uses include a post office, library, village centre and medical services.
- A1.106 Data from the Valuation Office Agency (VOA) indicates that Kibworth Beauchamp's Zone A retail rental values are £250 per sq.m, higher than those in Broughton Astley (£240 per sq.m).
- A1.107 In general shops are well maintained, with signs of recent investment. Outdoor café seating at the western end of the High Street benefits the ambience. Traffic however is fairly consistent along the High Street.
- A1.108 There are two bus stops at the eastern end of the High Street, linking to Leicester (X3, X31), Market Harborough (44, X3, X7) and Northampton (X7). There is free parking near the centre at School Road and Paget Street.
- A1.109 The crime rate is very low in Kibworth, with only two crimes reported in its centre in March 2024 (Police.uk).

Fleckney

A1.110 Fleckney’s central business area is focused along the High Street, with connected Main Street, the Parade and School Street forming a circuit. Retail and service uses are concentrated along the High Street with the other streets mainly hosting service and community uses. Outside of the centre there is a small industrial park in the southeast of Fleckney.

Figure LC2 – Fleckney Shopping and Business Area



Source: Harborough District Council

- A1.111 Fleckney’s shop frontages are fragmented. School Street is primarily residential, as is the southern portion of the High Street, where front gardens make up the majority of frontage.
- A1.112 Fleckney has 11 retail and service units within its Shopping and Business area, excluding leisure, office, community and medical uses. The mix of uses is set out in Table LC2, which is compared with the District and UK averages. There were no vacant units at the time of Lichfields’ survey in April 2024, suggesting that provision is in line with operator demand.
- A1.113 All categories of use are represented but the choice of shops and services in each category is limited to one to three outlets only. Notably, Fleckney has three hairdressers/barbers. Other uses include a dentist, medical centre and a church with a church hall.

Table LC2 - Mix of retail and service uses – Fleckney Shopping and Business Area

Type	Number of units	% units	% units District average	% units UK average
Convenience retail	2	18.2	9.7	9.5
Comparison retail	1	9.1	34.2	27.7
Financial / professional	1	9.1	10.6	8.5
Restaurant / café	1	9.1	9.9	10.0
Public house / bar	1	9.1	4.0	4.9
Hot food takeaway	2	18.2	5.9	6.2
Other non-retail services	3	27.3	18.0	19.3
Vacant units	0	0.0	7.6	13.9
Total	11	100.0	100.0	100.0

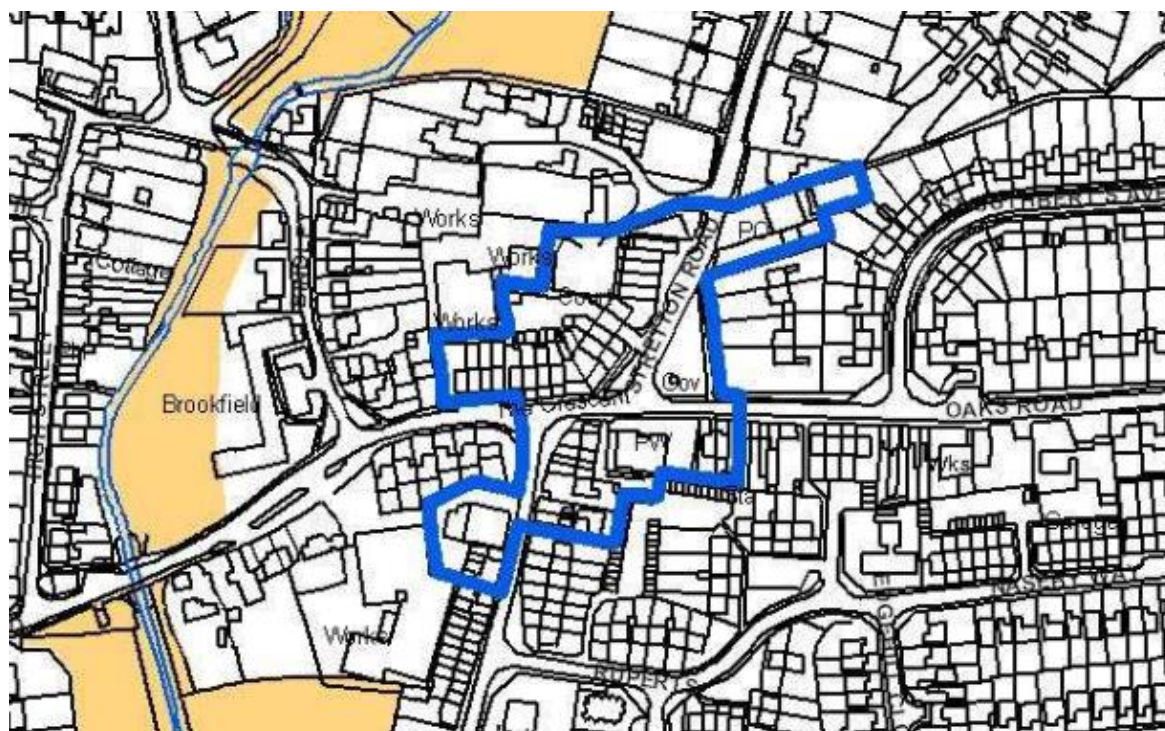
Source: Lichfields' land use survey May 2024 and Goad Plan UK average.

- A1.114 Data from the Valuation Office Agency (VOA) indicates that Fleckney's Zone A retail rental values are £165 per sq.m, the second lowest of the assessed centres. It is higher than Great Glen (£130 per sq.m.) but much lower than Broughton Astley (£240 per sq.m).
- A1.115 The centre is relatively fragmented and dispersed. The Parade, connecting School Street with Main Street, is a quaint lane hosting some service uses. Residential units separate this area, as well as the Village Hall and Library, from the main shops on the High Street. Fleckney Village Green with its large pond is an attractive asset but there are few retail/service units nearby. Traffic along the High Street is consistent, but there is a well-placed pelican crossing. Pavements are very narrow in places. The quality and attractiveness of buildings in the centre varies, with some showing signs of age.
- A1.116 Bus stops are located adjacent to the Co-op, at the northern end of the centre. Routes connect to Leicester (49) and Market Harborough (44). There is plenty of off-street parking on the High Street, at the Co-op, Old Crown Pub, Library and Fleckney Village Hall, with on-street parking available throughout the centre.
- A1.117 The crime rate is very low in Fleckney, with only two crimes reported in its centre in March 2024 (Police.uk).

Great Glen

A1.118 Great Glen’s Shopping and Business Area is formed around two parades of shops on Church Road and Stretton Road, with a Co-op store on Main Street also included in the boundary. Approximately 40 metres to the south of the Co-op store is Village Hall and Library which are excluded from the Shopping and Business Area.

Figure LC3 – Great Glen Shopping and Business Area



Source: Harborough District Council

A1.119 Great Glen has 7 retail and service units in the Shopping and Business area. The mix of uses is set out in Table LC3, which is compared with the District and UK averages. There was only one vacant unit at the time of Lichfields’ survey in April 2024.

Table LC3 - Mix of retail and service uses – Great Glen Shopping and Business Area

Type	Number of units	% units	% units District average	% units UK average
Convenience retail	2	28.6	9.7	9.5
Comparison retail	1	14.3	34.2	27.7
Financial / professional	0	0.0	10.6	8.5
Restaurant / café	1	14.3	9.9	10.0
Public house / bar	0	0.0	4.0	4.9
Hot food takeaway	0	0.0	5.9	6.2
Other non-retail services	2	28.6	18.0	19.3
Vacant units	1	14.3	7.6	13.9
Total	7	100.0	100.0	100.0

Source: Lichfields’ land use survey May 2024 and Goad Plan UK average.

- A1.120 Three of the five non-retail service categories are not represented in Great Glen. In addition to the Co-op store, it has a Spar/Post Office, pharmacy, café and hairdressing salon. Other uses in the centre boundary include the Great Glen Parish Council offices, a dentist and a physiotherapist. Great Glen's pubs are outside of the Shopping and Business Area.
- A1.121 Data from the Valuation Office Agency (VOA) indicates that Great Glen's Zone A retail rental values are £130 per sq.m, the lowest of the assessed centres.
- A1.122 The town centre boundary includes several residential units, but does not extend to the Library and Community Centre. There is consistent traffic flow through the centre and no pedestrian crossings. The quality of shop premises is mixed with some ageing units on Stretton Road. The outdoor café seating is a strength, and there is pleasant landscaping in front gardens.
- A1.123 There are bus stops on Church Road, just west of the centre, connecting Great Glen to Leicester (X3, X31) and Market Harborough (X3). Off street parking availability is limited, with a few spaces at the Co-op, Library and outside the Spar/Post Office. On-street parking is free, and there are some spaces along Church Road.
- A1.124 The crime rate is very low in Great Glen, with only two crimes reported in its centre in March 2024 (Police.uk)
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Appendix 3 Convenience goods assessment

Table 1 - Study area population projections

Zone	2024	2026	2031	2036	2041
1 - Lutterworth	20,918	21,055	21,398	21,740	22,083
2 - Broughton Astley / Fleckney	19,179	19,349	19,772	20,196	20,620
3 - Great Glen / Kibworth	21,999	22,562	23,970	25,377	26,785
4 - Market Harborough	27,039	27,432	28,416	29,399	30,383
5 - Clipton / Brixworth	12,842	13,172	13,872	14,476	15,015
6 - Desborough / Rothwell	27,656	28,159	29,224	30,160	31,031
Total	129,633	131,729	136,652	141,349	145,917

Sources: Experian population projections 2024. Distribution of population growth in Zones 1 to 4, based on preferred site allocations.

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

Zone	2024	2026	2031	2036	2041
1 - Lutterworth	2,589	2,568	2,549	2,545	2,552
2 - Broughton Astley / Fleckney	2,564	2,542	2,523	2,520	2,527
3 - Great Glen / Kibworth	2,706	2,684	2,664	2,660	2,668
4 - Market Harborough	2,486	2,465	2,447	2,443	2,450
5 - Clipton / Brixworth	2,721	2,698	2,678	2,674	2,682
6 - Desborough / Rothwell	2,391	2,371	2,353	2,350	2,356

Sources:

Experian Local Expenditure 2022 (2022 prices)

Experian growth rates - Retail Planner Briefing Note 21 (February 2024)

Excludes Special Forms of Trading (SFT)

Table 3 - Total convenience goods expenditure (£M)

Zone	2024	2026	2031	2036	2041
1 - Lutterworth	54.16	54.07	54.53	55.33	56.36
2 - Broughton Astley / Fleckney	49.17	49.19	49.89	50.89	52.10
3 - Great Glen / Kibworth	59.54	60.56	63.85	67.50	71.45
4 - Market Harborough	67.22	67.63	69.53	71.83	74.44
5 - Clipton / Brixworth	34.94	35.54	37.15	38.71	40.27
6 - Desborough / Rothwell	66.12	66.76	68.77	70.87	73.12
Total	331.15	333.75	343.72	355.13	367.75

Source: Tables 1 and 2

Table 4 - Base year 2024 convenience goods market shares by zone (%)

	1 Lutterworth	2 Broughton Astley	3 Great Glen / Kibworth	4 Market Harborough	5 Clipton / Brixworth	6 Desborough / Rothwell	Inflow
Zone 1 - Lutterworth	74.2%	13.5%	3.3%	1.0%	1.2%	0.0%	5.0%
Zone 1 - other	3.0%	0.0%	0.0%	0.0%	0.3%	0.0%	5.0%
Zone 2 - Broughton Astley	2.8%	34.5%	0.0%	0.0%	0.0%	0.5%	5.0%
Zone 2 - Fleckney	0.0%	8.3%	0.0%	0.0%	0.0%	0.0%	5.0%
Zone 3 - Great Glen	0.0%	0.0%	6.6%	0.7%	0.0%	0.0%	5.0%
Zone 3 - Kibworth	0.0%	0.4%	11.4%	0.0%	0.0%	0.0%	5.0%
Zone 3 - Other	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	5.0%
Zone 4 - Market Harborough	3.7%	10.1%	31.5%	85.2%	41.6%	24.2%	5.0%
Harborough District total	83.7%	66.8%	54.0%	86.9%	43.1%	24.7%	n/a
Zone 5 - Brixworth	0.0%	0.0%	0.0%	0.0%	16.3%	0.0%	n/a
Zone 5 - other	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%	n/a
Zone 6 - Desborough	0.0%	0.0%	0.0%	0.0%	0.0%	23.0%	n/a
Zone 6 - other	0.0%	0.0%	0.4%	0.0%	0.0%	4.7%	n/a
Other study area total	0.0%	0.0%	0.4%	0.0%	19.6%	27.7%	n/a
Corby	0.0%	0.0%	5.3%	1.9%	0.0%	19.2%	n/a
Hinckley	2.4%	1.0%	0.0%	0.0%	0.0%	1.0%	n/a
Kettering	0.0%	0.0%	0.3%	2.4%	2.8%	26.3%	n/a
Leicester/Blaby/Oadby/Wigston	5.3%	26.3%	40.0%	6.8%	1.1%	0.1%	n/a
Northampton	0.0%	0.0%	0.0%	0.0%	28.5%	0.7%	n/a
Rugby	8.6%	1.1%	0.0%	0.7%	4.2%	0.0%	n/a
Elsewhere	0.0%	4.9%	0.0%	1.3%	0.6%	0.3%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey April 2024 and Lichfields' analysis.

Table 5 - Base year 2024 convenience goods expenditure patterns by zone (£M)

	1	2	3	4	5	6	Inflow	Total
	Lutterworth	Broughton Astley	Great Glen / Kibworth	Market Harborough	Clipton / Brixworth	Desborough / Rothwell		
Expenditure 2024	54.16	49.17	59.54	67.22	34.94	66.12		331.15
Zone 1 - Lutterworth	40.21	6.65	1.97	0.67	0.44	0.00	2.63	52.56
Zone 1 - other	1.64	0.00	0.00	0.00	0.12	0.00	0.09	1.85
Zone 2 - Broughton Astley	1.51	16.96	0.00	0.00	0.00	0.34	0.99	19.79
Zone 2 - Fleckney	0.00	4.09	0.00	0.00	0.00	0.00	0.22	4.31
Zone 3 - Great Glen	0.00	0.00	3.94	0.48	0.00	0.00	0.23	4.65
Zone 3 - Kibworth	0.00	0.18	6.81	0.00	0.00	0.00	0.37	7.35
Zone 3 - Other	0.00	0.00	0.70	0.00	0.00	0.00	0.04	0.74
Zone 4 - Market Harborough	1.99	4.97	18.74	57.27	14.52	16.00	5.97	119.47
Harborough District total	45.35	32.84	32.17	58.41	15.08	16.34	10.54	210.73
Zone 5 - Brixworth	0.00	0.00	0.00	0.00	5.69	0.00	n/a	5.69
Zone 5 - other	0.00	0.00	0.00	0.00	1.17	0.00	n/a	1.17
Zone 6 - Desborough	0.00	0.00	0.00	0.00	0.00	15.21	n/a	15.21
Zone 6 - other	0.00	0.00	0.23	0.00	0.00	3.14	n/a	3.36
Other study area total	0.00	0.00	0.23	0.00	6.86	18.34	n/a	25.42
Corby	0.00	0.00	3.14	1.29	0.00	12.72	n/a	17.15
Hinckley	1.28	0.48	0.00	0.00	0.00	0.67	n/a	2.42
Kettering	0.00	0.00	0.20	1.61	0.96	17.38	n/a	20.16
Leicester/Blaby/Oadby/Wigston	2.87	12.93	23.80	4.55	0.40	0.07	n/a	44.62
Northampton	0.00	0.00	0.00	0.00	9.97	0.44	n/a	10.41
Rugby	4.67	0.53	0.00	0.50	1.48	0.00	n/a	7.17
Elsewhere	0.00	2.39	0.00	0.85	0.20	0.17	n/a	3.61
TOTAL	54.16	49.17	59.54	67.22	34.94	66.12	n/a	341.69

Source: Tables 3 and 4

Table 6 - Future 2026 convenience goods expenditure patterns by zone (£M)

	1	2	3	4	5	6	Inflow	Total
	Lutterworth	Broughton Astley	Great Glen / Kibworth	Market Harborough	Clipton / Brixworth	Desborough / Rothwell		
Expenditure 2026	54.07	49.19	60.56	67.63	35.54	66.76		333.75
Zone 1 - Lutterworth	40.13	6.65	2.01	0.67	0.44	0.00	2.63	52.54
Zone 1 - other	1.64	0.00	0.00	0.00	0.12	0.00	0.09	1.85
Zone 2 - Broughton Astley	1.50	16.96	0.00	0.00	0.00	0.34	0.99	19.80
Zone 2 - Fleckney	0.00	4.09	0.00	0.00	0.00	0.00	0.22	4.31
Zone 3 - Great Glen	0.00	0.00	4.01	0.48	0.00	0.00	0.24	4.72
Zone 3 - Kibworth	0.00	0.18	6.92	0.00	0.00	0.00	0.37	7.48
Zone 3 - Other	0.00	0.00	0.72	0.00	0.00	0.00	0.04	0.75
Zone 4 - Market Harborough	1.98	4.97	19.06	57.62	14.77	16.15	6.03	120.60
Harborough District total	45.26	32.86	32.72	58.77	15.34	16.50	10.60	212.05
Zone 5 - Brixworth	0.00	0.00	0.00	0.00	5.78	0.00	n/a	5.78
Zone 5 - other	0.00	0.00	0.00	0.00	1.19	0.00	n/a	1.19
Zone 6 - Desborough	0.00	0.00	0.00	0.00	0.00	15.35	n/a	15.35
Zone 6 - other	0.00	0.00	0.23	0.00	0.00	3.17	n/a	3.40
Other study area total	0.00	0.00	0.23	0.00	6.97	18.52	n/a	25.72
Corby	0.00	0.00	3.19	1.30	0.00	12.84	n/a	17.34
Hinckley	1.28	0.48	0.00	0.00	0.00	0.67	n/a	2.43
Kettering	0.00	0.00	0.20	1.62	0.98	17.54	n/a	20.35
Leicester/Blaby/Oadby/Wigston	2.86	12.93	24.21	4.57	0.41	0.07	n/a	45.06
Northampton	0.00	0.00	0.00	0.00	10.14	0.44	n/a	10.59
Rugby	4.66	0.53	0.00	0.50	1.50	0.00	n/a	7.19
Elsewhere	0.00	2.39	0.00	0.85	0.20	0.17	n/a	3.62
TOTAL	54.07	49.19	60.56	67.63	35.54	66.76	n/a	344.35

Source: Tables 3 and 4

Table 7 - Future 2031 convenience goods expenditure patterns by zone (£M)

	1	2	3	4	5	6	Inflow	Total
	Lutterworth	Broughton Astley	Great Glen / Kibworth	Market Harborough	Clipton / Brixworth	Desborough / Rothwell		
Expenditure 2031	54.53	49.89	63.85	69.53	37.15	68.77		343.72
Zone 1 - Lutterworth	40.48	6.75	2.12	0.69	0.46	0.00	2.66	53.16
Zone 1 - other	1.66	0.00	0.00	0.00	0.12	0.00	0.09	1.87
Zone 2 - Broughton Astley	1.52	17.21	0.00	0.00	0.00	0.35	1.00	20.08
Zone 2 - Fleckney	0.00	4.15	0.00	0.00	0.00	0.00	0.22	4.37
Zone 3 - Great Glen	0.00	0.00	4.23	0.49	0.00	0.00	0.25	4.97
Zone 3 - Kibworth	0.00	0.18	7.30	0.00	0.00	0.00	0.39	7.87
Zone 3 - Other	0.00	0.00	0.76	0.00	0.00	0.00	0.04	0.80
Zone 4 - Market Harborough	2.00	5.04	20.10	59.24	15.44	16.64	6.23	124.70
Harborough District total	45.65	33.33	34.50	60.42	16.03	16.99	10.89	217.82
Zone 5 - Brixworth	0.00	0.00	0.00	0.00	6.05	0.00	n/a	6.05
Zone 5 - other	0.00	0.00	0.00	0.00	1.24	0.00	n/a	1.24
								0.00
Zone 6 - Desborough	0.00	0.00	0.00	0.00	0.00	15.81	n/a	15.81
Zone 6 - other	0.00	0.00	0.24	0.00	0.00	3.26	n/a	3.50
Other study area total	0.00	0.00	0.24	0.00	7.29	19.08	n/a	26.61
Corby	0.00	0.00	3.37	1.34	0.00	13.23	n/a	17.93
Hinckley	1.29	0.48	0.00	0.00	0.00	0.69	n/a	2.47
Kettering	0.00	0.00	0.22	1.67	1.03	18.07	n/a	20.98
Leicester/Blaby/Oadby/Wigston	2.89	13.12	25.53	4.70	0.43	0.08	n/a	46.74
Northampton	0.00	0.00	0.00	0.00	10.60	0.46	n/a	11.06
Rugby	4.70	0.53	0.00	0.52	1.57	0.00	n/a	7.32
Elsewhere	0.00	2.43	0.00	0.88	0.21	0.17	n/a	3.69
TOTAL	54.53	49.89	63.85	69.53	37.15	68.77	n/a	354.62

Source: Tables 3 and 4

Table 8 - Future 2036 convenience goods expenditure patterns by zone (£M)

	1	2	3	4	5	6	Inflow	Total
	Lutterworth	Broughton Astley	Great Glen / Kibworth	Market Harborough	Clipton / Brixworth	Desborough / Rothwell		
Expenditure 2036	55.33	50.89	67.50	71.83	38.71	70.87		355.13
Zone 1 - Lutterworth	41.07	6.88	2.24	0.71	0.48	0.00	2.70	54.09
Zone 1 - other	1.68	0.00	0.00	0.00	0.13	0.00	0.10	1.90
Zone 2 - Broughton Astley	1.54	17.55	0.00	0.00	0.00	0.36	1.02	20.48
Zone 2 - Fleckney	0.00	4.23	0.00	0.00	0.00	0.00	0.22	4.46
Zone 3 - Great Glen	0.00	0.00	4.47	0.51	0.00	0.00	0.26	5.24
Zone 3 - Kibworth	0.00	0.18	7.72	0.00	0.00	0.00	0.42	8.32
Zone 3 - Other	0.00	0.00	0.80	0.00	0.00	0.00	0.04	0.84
Zone 4 - Market Harborough	2.03	5.14	21.25	61.20	16.09	17.14	6.47	129.33
Harborough District total	46.32	33.99	36.47	62.42	16.70	17.51	11.23	224.66
Zone 5 - Brixworth	0.00	0.00	0.00	0.00	6.30	0.00	n/a	6.30
Zone 5 - other	0.00	0.00	0.00	0.00	1.29	0.00	n/a	1.29
								0.00
Zone 6 - Desborough	0.00	0.00	0.00	0.00	0.00	16.30	n/a	16.30
Zone 6 - other	0.00	0.00	0.26	0.00	0.00	3.36	n/a	3.62
Other study area total	0.00	0.00	0.26	0.00	7.60	19.66	n/a	27.51
Corby	0.00	0.00	3.56	1.38	0.00	13.63	n/a	18.57
Hinckley	1.31	0.49	0.00	0.00	0.00	0.72	n/a	2.52
Kettering	0.00	0.00	0.23	1.73	1.07	18.62	n/a	21.64
Leicester/Blaby/Oadby/Wigston	2.93	13.38	26.99	4.86	0.44	0.08	n/a	48.68
Northampton	0.00	0.00	0.00	0.00	11.05	0.47	n/a	11.52
Rugby	4.77	0.54	0.00	0.53	1.64	0.00	n/a	7.48
Elsewhere	0.00	2.48	0.00	0.91	0.22	0.18	n/a	3.78
TOTAL	55.33	50.89	67.50	71.83	38.71	70.87	n/a	366.36

Source: Tables 3 and 4

Table 9 - Future 2041 convenience goods expenditure patterns by zone (£M)

	1	2	3	4	5	6	Inflow	Total
	Lutterworth	Broughton Astley	Great Glen / Kibworth	Market Harborough	Clipton / Brixworth	Desborough / Rothwell		
Expenditure 2041	56.36	52.10	71.45	74.44	40.27	73.12		367.75
Zone 1 - Lutterworth	41.84	7.05	2.37	0.74	0.50	0.00	2.76	55.26
Zone 1 - other	1.71	0.00	0.00	0.00	0.13	0.00	0.10	1.94
Zone 2 - Broughton Astley	1.57	17.97	0.00	0.00	0.00	0.38	1.05	20.96
Zone 2 - Fleckney	0.00	4.34	0.00	0.00	0.00	0.00	0.23	4.56
Zone 3 - Great Glen	0.00	0.00	4.73	0.53	0.00	0.00	0.28	5.53
Zone 3 - Kibworth	0.00	0.19	8.17	0.00	0.00	0.00	0.44	8.80
Zone 3 - Other	0.00	0.00	0.85	0.00	0.00	0.00	0.04	0.89
Zone 4 - Market Harborough	2.07	5.27	22.49	63.43	16.74	17.69	6.72	134.40
Harborough District total	47.18	34.80	38.61	64.69	17.38	18.07	11.62	232.35
Zone 5 - Brixworth	0.00	0.00	0.00	0.00	6.55	0.00	n/a	6.55
Zone 5 - other	0.00	0.00	0.00	0.00	1.35	0.00	n/a	1.35
Zone 6 - Desborough	0.00	0.00	0.00	0.00	0.00	16.82	n/a	16.82
Zone 6 - other	0.00	0.00	0.27	0.00	0.00	3.47	n/a	3.74
Other study area total	0.00	0.00	0.27	0.00	7.90	20.28	n/a	28.45
Corby	0.00	0.00	3.77	1.43	0.00	14.07	n/a	19.27
Hinckley	1.33	0.51	0.00	0.00	0.00	0.74	n/a	2.57
Kettering	0.00	0.00	0.24	1.79	1.11	19.22	n/a	22.36
Leicester/Blaby/Oadby/Wigston	2.99	13.70	28.56	5.04	0.46	0.08	n/a	50.83
Northampton	0.00	0.00	0.00	0.00	11.49	0.49	n/a	11.98
Rugby	4.86	0.56	0.00	0.55	1.70	0.00	n/a	7.67
Elsewhere	0.00	2.54	0.00	0.94	0.23	0.18	n/a	3.89
TOTAL	56.36	52.10	71.45	74.44	40.27	73.12	n/a	379.36

Source: Tables 3 and 4

Table 10 - Main food stores convenience goods sales floorspace and benchmark turnover

Store	Sales floorspace (sq m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq m net)	Turnover (£ per sq m)	Total turnover (£m)
Waitrose, Lower Lecester Road, Lutterworth	1,173	90%	1,056	£14,470	£15.28
Morrison's, Briteswell Road, Lutterworth	1,864	85%	1,584	£12,721	£20.16
Aldi, Rugby Road, Lutterworth	1,315	80%	1,052	£14,548	£15.30
Co-op, Linden Drive, Lutterworth	275	95%	261	£11,174	£2.92
Lutterworth sub-total	4,627		3,953		£53.65
Co-op, Main Street, Broughton Astley	610	95%	580	£11,174	£6.48
Aldi, Buxton Crescent, Broughton Astley	1,200	80%	960	£14,548	£13.97
Broughton Astley sub-total	1,810		1,540		£20.44
Aldi, Springfield Street, Market Harborough	856	80%	685	£14,548	£9.96
B&M, Portlethen Retail Park, Market Harborough	2,789	30%	837	£2,938	£2.46
Co-op, Coventry Road, Market Harborough	839	95%	797	£11,174	£8.91
Co-op Forecourt, Coventry Road, Market Harborough	84	95%	80	£11,174	£0.89
Co-op, Leicester Road, Market Harborough	285	95%	271	£11,174	£3.03
Lidl, Kettering Road, Market Harborough	1,155	80%	924	£11,438	£10.57
Sainsbury's, St Mary's Place, Market Harborough	2,357	85%	2,003	£14,522	£29.09
Tesco Express, The Square, Market Harborough	816	95%	775	£14,511	£11.25
Tesco Express, Rockingham Road, Market Harborough	84	95%	80	£14,511	£1.16
Waitrose, Springfield Street, Market Harborough	1,117	90%	1,005	£14,470	£14.55
Market Harborough sub-total	10,382		7,457		£91.86
Co-op, High Street, Fleckney	535	95%	508	£11,174	£5.68
Co-op, Main Street, Great Glen	230	95%	219	£11,174	£2.44
Co-op, High Street, Kibworth	490	95%	466	£11,174	£5.20
Marks & Spencer Simply Food, Melton Road	84	95%	80	£11,438	£0.91
Morrison's Daily, Walcote	167	95%	159	£12,721	£2.02
Other Harborough sub-total	1,506		1,431		£16.25
Total	18,325		14,380		£182.21

	Sales floorspace (sq m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq m net)	Turnover (£ per sq m)	Total turnover (£m)
Aldi, Springfield Street, Market Harborough	856	80%	685	£14,548	£9.96
Aldi, Rockingham Road, Market Harborough	1,315	80%	1,052	£14,548	£15.30
Change	459		367		£5.34
Co-op, Main Street, Great Glen	230	95%	219	£11,174	£2.44
Co-op, Church Street, Great Glen	280	95%	266	£11,174	£2.97
Change	50		48		£0.53

Source: ORC Storepoint 2023 and GlobalData estimated company average sales densities for 2023

Table 11 - Summary of convenience goods expenditure 2024 to 2041 (£m)

	2024	2026	2031	2036	2041
Available expenditure					
Zone 1 - Lutterworth	52.56	52.54	53.16	54.09	55.26
Zone 1 - other	1.85	1.85	1.87	1.90	1.94
Zone 2 - Broughton Astley	19.79	19.80	20.08	20.48	20.96
Zone 2 - Fleckney	4.31	4.31	4.37	4.46	4.56
Zone 3 - Great Glen	4.65	4.72	4.97	5.24	5.53
Zone 3 - Kibworth	7.35	7.48	7.87	8.32	8.80
Zone 3 - Other	0.74	0.75	0.80	0.84	0.89
Zone 4 - Market Harborough	119.47	120.60	124.70	129.33	134.40
Total	210.73	212.05	217.82	224.66	232.35
Turnover of existing facilities					
Zone 1 - Lutterworth	52.56	52.67	53.14	53.41	53.68
Zone 1 - other	1.85	1.86	1.87	1.88	1.89
Zone 2 - Broughton Astley	19.79	19.83	20.01	20.11	20.21
Zone 2 - Fleckney	4.31	4.32	4.35	4.38	4.40
Zone 3 - Great Glen	4.65	5.19	5.24	5.26	5.29
Zone 3 - Kibworth	7.35	7.37	7.43	7.47	7.51
Zone 3 - Other	0.74	0.74	0.75	0.75	0.76
Zone 4 - Market Harborough	119.47	125.06	126.19	126.82	127.45
Total	210.73	217.03	218.99	220.09	221.19
Surplus/deficit expenditure					
Zone 1 - Lutterworth	-	-0.13	0.01	0.68	1.58
Zone 1 - other	-	0.00	0.00	0.02	0.05
Zone 2 - Broughton Astley	-	-0.03	0.07	0.36	0.75
Zone 2 - Fleckney	-	-0.01	0.02	0.08	0.17
Zone 3 - Great Glen	-	-0.47	-0.27	-0.02	0.24
Zone 3 - Kibworth	-	0.11	0.44	0.85	1.29
Zone 3 - Other	-	0.01	0.05	0.09	0.13
Zone 4 - Market Harborough	-	-4.46	-1.49	2.51	6.95
Total	-	-4.98	-1.18	4.57	11.16

Source: Tables 5 to 10 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Figure 4b

Table 12 - Convenience goods floorspace capacity up to 2041 (cumulative)

	2024	2026	2031	2036	2041
Turnover density new floorspace (£ per sq m)	£12,000	£12,024	£12,133	£12,193	£12,254
Floorspace projection (sq m net)					
Zone 1 - Lutterworth	0	-11	1	56	129
Zone 1 - other	0	0	0	2	4
Zone 2 - Broughton Astley	0	-3	6	30	61
Zone 2 - Fleckney	0	-1	1	7	14
Zone 3 - Great Glen	0	-39	-22	-2	20
Zone 3 - Kibworth	0	9	36	69	105
Zone 3 - Other	0	1	4	7	11
Zone 4 - Market Harborough	0	-371	-123	206	567
Total	0	-414	-97	374	910
Floorspace projection (sq m gross)					
Zone 1 - Lutterworth	0	-16	2	80	184
Zone 1 - other	0	-1	0	2	6
Zone 2 - Broughton Astley	0	-4	8	43	87
Zone 2 - Fleckney	0	-1	2	10	19
Zone 3 - Great Glen	0	-56	-32	-3	28
Zone 3 - Kibworth	0	13	52	99	150
Zone 3 - Other	0	1	5	10	15
Zone 4 - Market Harborough	0	-530	-175	294	810
Total	0	-592	-138	535	1,300

Source: Table 11 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Figure 4b
 Figures may not sum due to rounding

Appendix 4 Comparison goods assessment

Table 1 - Study area population projections

Zone	2024	2026	2031	2036	2041
1 - Lutterworth	20,918	21,055	21,398	21,740	22,083
2 - Broughton Astley / Fleckney	19,179	19,349	19,772	20,196	20,620
3 - Great Glen / Kibworth	21,999	22,562	23,970	25,377	26,785
4 - Market Harborough	27,039	27,432	28,416	29,399	30,383
5 - Clipton / Brixworth	12,842	13,172	13,872	14,476	15,015
6 - Desborough / Rothwell	27,656	28,159	29,224	30,160	31,031
Total	129,633	131,729	136,652	141,349	145,917

Sources: Experian population projections 2024. Distribution of population growth in Zones 1 to 4, based on preferred site allocations.

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

Zone	2024	2026	2031	2036	2041
1 - Lutterworth	3,463	3,584	4,045	4,566	5,213
2 - Broughton Astley / Fleckney	3,531	3,655	4,124	4,656	5,315
3 - Great Glen / Kibworth	3,775	3,907	4,409	4,978	5,682
4 - Market Harborough	3,257	3,371	3,804	4,295	4,903
5 - Clipton / Brixworth	3,746	3,877	4,375	4,939	5,639
6 - Desborough / Rothwell	3,135	3,245	3,662	4,134	4,720

Sources:

Experian Local Expenditure 2022 (2022 prices)

Experian growth rates - Retail Planner Briefing Note 21 (February 2024)

Excludes Special Forms of Trading (SFT)

Table 3 - Total comparison goods expenditure (£M)

Zone	2024	2026	2031	2036	2041
1 - Lutterworth	72.44	75.47	86.55	99.28	115.12
2 - Broughton Astley / Fleckney	67.72	70.71	81.55	94.04	109.60
3 - Great Glen / Kibworth	83.04	88.15	105.69	126.32	152.20
4 - Market Harborough	88.06	92.47	108.10	126.26	148.96
5 - Clipton / Brixworth	48.10	51.07	60.70	71.50	84.66
6 - Desborough / Rothwell	86.71	91.38	107.03	124.69	146.46
Total	446.06	469.24	549.62	642.08	756.99

Source: Tables 1 and 2

Table 4 - Base year 2024 comparison goods market shares by zone (%)

	1	2	3	4	5	6	Inflow
	Lutterworth	Broughton Astley	Great Glen / Kibworth	Market Harborough	Clipton / Brixworth	Desborough / Rothwell	
Zone 1 - Lutterworth	20.5%	6.2%	5.7%	0.4%	0.8%	0.0%	5.0%
Zone 1 - other	2.8%	1.7%	0.2%	0.0%	0.1%	0.0%	5.0%
Zone 2 - Broughton Astley	0.2%	2.9%	0.0%	0.0%	0.0%	0.0%	5.0%
Zone 2 - Fleckney	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	5.0%
Zone 3 - Great Glen	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	5.0%
Zone 3 - Kibworth	0.0%	0.2%	1.4%	0.0%	0.0%	0.5%	5.0%
Zone 3 - Other	0.0%	0.6%	0.8%	0.0%	0.2%	0.2%	5.0%
Zone 4 - Market Harborough	7.9%	8.7%	25.3%	51.9%	24.6%	27.6%	5.0%
Harborough District total	31.4%	20.8%	33.8%	52.4%	25.7%	28.3%	n/a
Zone 5 - Brixworth	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	n/a
Zone 5 - other	0.0%	0.0%	0.0%	0.1%	0.5%	0.1%	n/a
							n/a
Zone 6 - Desborough	0.0%	0.0%	0.0%	0.0%	0.1%	5.5%	n/a
Zone 6 - other	0.3%	0.0%	0.4%	0.2%	0.0%	1.0%	n/a
Other study area total	0.3%	0.0%	0.4%	0.3%	2.1%	6.7%	n/a
Corby	0.6%	0.8%	5.4%	3.8%	0.6%	19.9%	n/a
Coventry	1.5%	1.5%	0.0%	0.0%	0.1%	0.0%	n/a
Daventry	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	n/a
Hinckley	1.8%	1.0%	0.1%	0.0%	0.0%	0.1%	n/a
Kettering	0.0%	0.0%	1.0%	6.0%	6.9%	28.7%	n/a
Leicester/Blaby/Oadby/Wigston	25.4%	63.3%	49.8%	28.6%	10.7%	5.4%	n/a
Northampton	0.0%	0.0%	0.1%	1.1%	32.8%	1.8%	n/a
Rugby	32.8%	7.9%	0.0%	1.8%	2.6%	1.0%	n/a
Wellingborough	0.0%	0.0%	0.2%	0.0%	0.1%	0.7%	n/a
Elsewhere	6.1%	4.6%	9.1%	5.9%	18.2%	7.4%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey April 2024 and Lichfields' analysis.

Table 5 - Base year 2024 comparison goods expenditure patterns by zone (£M)

	1	2	3	4	5	6	Inflow	Total
	Lutterworth	Broughton Astley	Great Glen / Kibworth	Market Harborough	Clipton / Brixworth	Desborough / Rothwell		
Expenditure 2024	72.44	67.72	83.04	88.06	48.10	86.71		446.06
Zone 1 - Lutterworth	14.88	4.21	4.72	0.35	0.39	0.00	1.29	25.85
Zone 1 - other	2.02	1.12	0.18	0.02	0.05	0.00	0.18	3.57
Zone 2 - Broughton Astley	0.14	1.99	0.00	0.00	0.00	0.00	0.11	2.24
Zone 2 - Fleckney	0.00	0.33	0.00	0.00	0.00	0.00	0.02	0.35
Zone 3 - Great Glen	0.00	0.00	0.34	0.00	0.00	0.00	0.02	0.36
Zone 3 - Kibworth	0.02	0.15	1.19	0.00	0.00	0.47	0.10	1.93
Zone 3 - Other	0.00	0.41	0.64	0.04	0.09	0.14	0.07	1.38
Zone 4 - Market Harborough	5.71	5.88	21.03	45.71	11.83	23.91	6.00	120.07
Harborough District total	22.77	14.10	28.09	46.11	12.36	24.52	7.79	155.75
Zone 5 - Brixworth	0.00	0.00	0.00	0.00	0.74	0.00	n/a	0.74
Zone 5 - other	0.00	0.00	0.00	0.06	0.23	0.11	n/a	0.40
Zone 6 - Desborough	0.00	0.00	0.00	0.02	0.04	4.80	n/a	4.86
Zone 6 - other	0.19	0.00	0.35	0.18	0.02	0.87	n/a	1.60
Other study area total	0.19	0.00	0.35	0.26	1.03	5.77	n/a	7.60
Corby	0.46	0.57	4.46	3.37	0.29	17.29	n/a	26.43
Coventry	1.11	1.01	0.00	0.00	0.04	0.00	n/a	2.16
Daventry	0.00	0.00	0.00	0.11	0.07	0.00	n/a	0.18
Hinckley	1.34	0.68	0.09	0.00	0.00	0.07	n/a	2.18
Kettering	0.00	0.00	0.85	5.24	3.31	24.85	n/a	34.25
Leicester/Blaby/Oadby/Wigston	18.38	42.89	41.38	25.19	5.15	4.69	n/a	137.68
Northampton	0.00	0.00	0.10	0.97	15.80	1.58	n/a	18.44
Rugby	23.79	5.36	0.00	1.58	1.25	0.87	n/a	32.86
Wellingborough	0.00	0.00	0.18	0.03	0.04	0.62	n/a	0.87
Elsewhere	4.40	3.11	7.54	5.19	8.77	6.46	n/a	35.46
TOTAL	72.44	67.72	83.04	88.06	48.10	86.71	n/a	453.85

Source: Tables 3 and 4

Table 6 - Future 2026 comparison goods expenditure patterns by zone (£M)

	1	2	3	4	5	6	Inflow	Total
	Lutterworth	Broughton Astley	Great Glen / Kibworth	Market Harborough	Clipton / Brixworth	Desborough / Rothwell		
Expenditure 2026	75.47	70.71	88.15	92.47	51.07	91.38		469.24
Zone 1 - Lutterworth	15.50	4.40	5.01	0.37	0.42	0.00	1.35	27.05
Zone 1 - other	2.11	1.17	0.19	0.02	0.05	0.00	0.19	3.73
Zone 2 - Broughton Astley	0.15	2.08	0.00	0.00	0.00	0.00	0.12	2.34
Zone 2 - Fleckney	0.00	0.34	0.00	0.00	0.00	0.00	0.02	0.36
Zone 3 - Great Glen	0.00	0.00	0.36	0.00	0.00	0.00	0.02	0.38
Zone 3 - Kibworth	0.02	0.16	1.26	0.00	0.00	0.49	0.10	2.04
Zone 3 - Other	0.00	0.43	0.67	0.04	0.09	0.15	0.07	1.46
Zone 4 - Market Harborough	5.95	6.14	22.32	48.00	12.56	25.20	6.32	126.50
Harborough District total	23.73	14.73	29.82	48.42	13.12	25.84	8.19	163.85
Zone 5 - Brixworth	0.00	0.00	0.00	0.00	0.78	0.00	n/a	0.78
Zone 5 - other	0.00	0.00	0.00	0.07	0.24	0.11	n/a	0.42
								0.00
Zone 6 - Desborough	0.00	0.00	0.00	0.02	0.05	5.06	n/a	5.12
Zone 6 - other	0.20	0.00	0.37	0.19	0.02	0.91	n/a	1.69
Other study area total	0.20	0.00	0.37	0.27	1.09	6.08	n/a	8.02
Corby	0.47	0.59	4.73	3.54	0.31	18.22	n/a	27.87
Coventry	1.16	1.05	0.00	0.00	0.05	0.00	n/a	2.25
Daventry	0.00	0.00	0.00	0.11	0.07	0.00	n/a	0.18
Hinckley	1.39	0.71	0.10	0.00	0.00	0.07	n/a	2.27
Kettering	0.00	0.00	0.91	5.50	3.51	26.18	n/a	36.11
Leicester/Blaby/Oadby/Wigston	19.15	44.79	43.93	26.46	5.46	4.95	n/a	144.73
Northampton	0.00	0.00	0.10	1.02	16.77	1.66	n/a	19.55
Rugby	24.79	5.60	0.00	1.66	1.32	0.92	n/a	34.29
Wellingborough	0.00	0.00	0.19	0.04	0.05	0.65	n/a	0.92
Elsewhere	4.58	3.24	8.01	5.45	9.31	6.81	n/a	37.39
TOTAL	75.47	70.71	88.15	92.47	51.07	91.38	n/a	477.44

Source: Tables 3 and 4

Table 7 - Future 2031 comparison goods expenditure patterns by zone (£M)

	1	2	3	4	5	6	Inflow	Total
	Lutterworth	Broughton Astley	Great Glen / Kibworth	Market Harborough	Clipton / Brixworth	Desborough / Rothwell		
Expenditure 2031	86.55	81.55	105.69	108.10	60.70	107.03		549.62
Zone 1 - Lutterworth	17.78	5.07	6.01	0.43	0.50	0.00	1.57	31.36
Zone 1 - other	2.42	1.35	0.22	0.02	0.06	0.00	0.21	4.29
Zone 2 - Broughton Astley	0.17	2.39	0.00	0.00	0.00	0.00	0.13	2.70
Zone 2 - Fleckney	0.00	0.40	0.00	0.00	0.00	0.00	0.02	0.42
Zone 3 - Great Glen	0.00	0.00	0.44	0.00	0.00	0.00	0.02	0.46
Zone 3 - Kibworth	0.03	0.18	1.52	0.00	0.00	0.58	0.12	2.42
Zone 3 - Other	0.00	0.50	0.81	0.04	0.11	0.17	0.09	1.72
Zone 4 - Market Harborough	6.82	7.09	26.76	56.11	14.93	29.51	7.43	148.66
Harborough District total	27.21	16.98	35.76	56.61	15.60	30.26	9.60	192.02
Zone 5 - Brixworth	0.00	0.00	0.00	0.00	0.93	0.00	n/a	0.93
Zone 5 - other	0.00	0.00	0.00	0.08	0.28	0.13	n/a	0.50
Zone 6 - Desborough	0.00	0.00	0.00	0.02	0.06	5.92	n/a	6.00
Zone 6 - other	0.23	0.00	0.45	0.22	0.02	1.07	n/a	1.99
Other study area total	0.23	0.00	0.45	0.32	1.29	7.13	n/a	9.41
Corby	0.54	0.68	5.67	4.14	0.37	21.34	n/a	32.75
Coventry	1.33	1.21	0.00	0.00	0.06	0.00	n/a	2.59
Daventry	0.00	0.00	0.00	0.13	0.08	0.00	n/a	0.22
Hinckley	1.60	0.82	0.11	0.00	0.00	0.08	n/a	2.62
Kettering	0.00	0.00	1.09	6.44	4.17	30.67	n/a	42.36
Leicester/Blaby/Oadby/Wigston	21.96	51.65	52.67	30.93	6.49	5.79	n/a	169.50
Northampton	0.00	0.00	0.12	1.19	19.93	1.94	n/a	23.19
Rugby	28.43	6.46	0.00	1.94	1.57	1.08	n/a	39.48
Wellingborough	0.00	0.00	0.22	0.04	0.06	0.76	n/a	1.08
Elsewhere	5.26	3.74	9.60	6.37	11.07	7.97	n/a	44.00
TOTAL	86.55	81.55	105.69	108.10	60.70	107.03	n/a	559.22

Source: Tables 3 and 4

Table 8 - Future 2036 comparison goods expenditure patterns by zone (£M)

	1	2	3	4	5	6	Inflow	Total
	Lutterworth	Broughton Astley	Great Glen / Kibworth	Market Harborough	Clipton / Brixworth	Desborough / Rothwell		
Expenditure 2036	99.28	94.04	126.32	126.26	71.50	124.69		642.08
Zone 1 - Lutterworth	20.39	5.85	7.18	0.50	0.59	0.00	1.82	36.33
Zone 1 - other	2.77	1.56	0.27	0.03	0.07	0.00	0.25	4.95
Zone 2 - Broughton Astley	0.19	2.76	0.00	0.00	0.00	0.00	0.16	3.11
Zone 2 - Fleckney	0.00	0.46	0.00	0.00	0.00	0.00	0.02	0.48
Zone 3 - Great Glen	0.00	0.00	0.52	0.00	0.00	0.00	0.03	0.55
Zone 3 - Kibworth	0.03	0.21	1.81	0.00	0.00	0.67	0.14	2.87
Zone 3 - Other	0.00	0.57	0.97	0.05	0.13	0.20	0.10	2.02
Zone 4 - Market Harborough	7.82	8.17	31.99	65.54	17.59	34.38	8.71	174.20
Harborough District total	31.21	19.58	42.74	66.12	18.37	35.26	11.23	224.50
Zone 5 - Brixworth	0.00	0.00	0.00	0.00	1.10	0.00	n/a	1.10
Zone 5 - other	0.00	0.00	0.00	0.09	0.33	0.16	n/a	0.58
Zone 6 - Desborough	0.00	0.00	0.00	0.03	0.06	6.90	n/a	6.99
Zone 6 - other	0.26	0.00	0.53	0.26	0.03	1.25	n/a	2.32
Other study area total	0.26	0.00	0.53	0.37	1.52	8.30	n/a	10.99
Corby	0.62	0.79	6.78	4.83	0.44	24.86	n/a	38.32
Coventry	1.52	1.40	0.00	0.00	0.06	0.00	n/a	2.99
Daventry	0.00	0.00	0.00	0.16	0.10	0.00	n/a	0.26
Hinckley	1.83	0.95	0.14	0.00	0.00	0.09	n/a	3.01
Kettering	0.00	0.00	1.30	7.52	4.92	35.73	n/a	49.46
Leicester/Blaby/Oadby/Wigston	25.19	59.56	62.95	36.12	7.65	6.75	n/a	198.22
Northampton	0.00	0.00	0.15	1.39	23.48	2.27	n/a	27.28
Rugby	32.61	7.45	0.00	2.27	1.85	1.26	n/a	45.43
Wellingborough	0.00	0.00	0.27	0.05	0.06	0.89	n/a	1.27
Elsewhere	6.03	4.31	11.47	7.44	13.04	9.29	n/a	51.57
TOTAL	99.28	94.04	126.32	126.26	71.50	124.69	n/a	653.31

Source: Tables 3 and 4

Table 9 - Future 2041 comparison goods expenditure patterns by zone (£M)

	1	2	3	4	5	6	Inflow	Total
	Lutterworth	Broughton Astley	Great Glen / Kibworth	Market Harborough	Clipton / Brixworth	Desborough / Rothwell		
Expenditure 2041	115.12	109.60	152.20	148.96	84.66	146.46		756.99
Zone 1 - Lutterworth	23.65	6.82	8.65	0.59	0.69	0.00	2.13	42.53
Zone 1 - other	3.22	1.82	0.32	0.03	0.09	0.00	0.29	5.76
Zone 2 - Broughton Astley	0.22	3.22	0.00	0.00	0.00	0.00	0.18	3.62
Zone 2 - Fleckney	0.00	0.53	0.00	0.00	0.00	0.00	0.03	0.56
Zone 3 - Great Glen	0.00	0.00	0.63	0.00	0.00	0.00	0.03	0.66
Zone 3 - Kibworth	0.03	0.24	2.18	0.00	0.00	0.79	0.17	3.42
Zone 3 - Other	0.00	0.67	1.16	0.06	0.15	0.24	0.12	2.40
Zone 4 - Market Harborough	9.07	9.52	38.54	77.32	20.82	40.38	10.30	205.96
Harborough District total	36.19	22.83	51.49	78.00	21.75	41.41	13.25	264.92
Zone 5 - Brixworth	0.00	0.00	0.00	0.00	1.30	0.00	n/a	1.30
Zone 5 - other	0.00	0.00	0.00	0.11	0.40	0.18	n/a	0.69
Zone 6 - Desborough	0.00	0.00	0.00	0.03	0.08	8.10	n/a	8.21
Zone 6 - other	0.30	0.00	0.64	0.30	0.03	1.47	n/a	2.74
Other study area total	0.30	0.00	0.64	0.44	1.81	9.75	n/a	12.94
Corby	0.72	0.92	8.17	5.70	0.52	29.20	n/a	45.23
Coventry	1.77	1.63	0.00	0.00	0.08	0.00	n/a	3.47
Daventry	0.00	0.00	0.00	0.18	0.12	0.00	n/a	0.30
Hinckley	2.13	1.11	0.16	0.00	0.00	0.11	n/a	3.51
Kettering	0.00	0.00	1.56	8.87	5.82	41.97	n/a	58.22
Leicester/Blaby/Oadby/Wigston	29.21	69.42	75.84	42.62	9.06	7.93	n/a	234.08
Northampton	0.00	0.00	0.18	1.64	27.80	2.66	n/a	32.28
Rugby	37.81	8.68	0.00	2.68	2.19	1.47	n/a	52.84
Wellingborough	0.00	0.00	0.32	0.06	0.08	1.04	n/a	1.50
Elsewhere	6.99	5.03	13.82	8.77	15.44	10.91	n/a	60.96
TOTAL	115.12	109.60	152.20	148.96	84.66	146.46	n/a	770.24

Source: Tables 3 and 4

Table 10 - Summary of comparison goods expenditure 2024 to 2041 (£m)

	2024	2026	2031	2036	2041
Available expenditure					
Zone 1 - Lutterworth	25.85	27.05	31.36	36.33	42.53
Zone 1 - other	3.57	3.73	4.29	4.95	5.76
Zone 2 - Broughton Astley	2.24	2.34	2.70	3.11	3.62
Zone 2 - Fleckney	0.35	0.36	0.42	0.48	0.56
Zone 3 - Great Glen	0.36	0.38	0.46	0.55	0.66
Zone 3 - Kibworth	1.93	2.04	2.42	2.87	3.42
Zone 3 - Other	1.38	1.46	1.72	2.02	2.40
Zone 4 - Market Harborough	120.07	126.50	148.66	174.20	205.96
Total	155.75	163.85	192.02	224.50	264.92
Turnover of existing facilities					
Zone 1 - Lutterworth	25.85	26.92	30.60	34.80	39.56
Zone 1 - other	3.57	3.72	4.23	4.80	5.46
Zone 2 - Broughton Astley	2.24	2.33	2.65	3.02	3.43
Zone 2 - Fleckney	0.35	0.36	0.41	0.47	0.53
Zone 3 - Great Glen	0.36	0.38	0.43	0.49	0.55
Zone 3 - Kibworth	1.93	2.01	2.28	2.59	2.95
Zone 3 - Other	1.38	1.44	1.64	1.86	2.11
Zone 4 - Market Harborough	120.07	125.04	142.17	161.63	183.77
Total	155.75	162.19	184.40	209.65	238.36
Surplus/deficit expenditure					
Zone 1 - Lutterworth	-	0.13	0.75	1.53	2.97
Zone 1 - other	-	0.01	0.07	0.14	0.30
Zone 2 - Broughton Astley	-	0.01	0.04	0.09	0.19
Zone 2 - Fleckney	-	0.00	0.01	0.01	0.03
Zone 3 - Great Glen	-	0.01	0.03	0.06	0.11
Zone 3 - Kibworth	-	0.03	0.14	0.27	0.47
Zone 3 - Other	-	0.02	0.08	0.17	0.29
Zone 4 - Market Harborough	-	1.45	6.49	12.57	22.20
Total	-	1.66	7.62	14.85	26.56

Source: Tables 5 to 9 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Figure 4b

Table 11 - Comparison goods floorspace capacity up to 2041 (cumulative)

	2024	2026	2031	2036	2041
Turnover density new floorspace (£ per sq m)	£6,000	£6,248	£7,104	£8,077	£9,183
Floorspace projection (sq m net)					
Zone 1 - Lutterworth	0	21	106	190	323
Zone 1 - other	0	1	10	18	33
Zone 2 - Broughton Astley	0	1	6	11	21
Zone 2 - Fleckney	0	0	1	2	3
Zone 3 - Great Glen	0	1	5	8	12
Zone 3 - Kibworth	0	5	20	34	51
Zone 3 - Other	0	3	12	20	32
Zone 4 - Market Harborough	0	233	914	1,556	2,417
Total	0	265	1,072	1,839	2,892
Floorspace projection (sq m gross)					
Zone 1 - Lutterworth	0	30	151	271	462
Zone 1 - other	0	2	14	25	47
Zone 2 - Broughton Astley	0	1	9	16	30
Zone 2 - Fleckney	0	0	1	3	5
Zone 3 - Great Glen	0	2	6	11	17
Zone 3 - Kibworth	0	7	28	48	73
Zone 3 - Other	0	4	17	29	45
Zone 4 - Market Harborough	0	332	1,305	2,223	3,453
Total	0	379	1,532	2,627	4,132

Source: Table 9 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Figure 4b
 Figures may not sum due to rounding

Appendix 5 Food/beverage assessment

Table 1 - Study area population projections

Zone	2024	2026	2031	2036	2041
1 - Lutterworth	20,918	21,055	21,398	21,740	22,083
2 - Broughton Astley / Fleckney	19,179	19,349	19,772	20,196	20,620
3 - Great Glen / Kibworth	21,999	22,562	23,970	25,377	26,785
4 - Market Harborough	27,039	27,432	28,416	29,399	30,383
5 - Clipton / Brixworth	12,842	13,172	13,872	14,476	15,015
6 - Desborough / Rothwell	27,656	28,159	29,224	30,160	31,031
Total	129,633	131,729	136,652	141,349	145,917

Sources: Experian population projections 2024. Distribution of population growth in Zones 1 to 4, based on preferred site allocations.

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

Zone	2024	2026	2031	2036	2041
1 - Lutterworth	1,868	1,900	2,000	2,082	2,166
2 - Broughton Astley / Fleckney	1,957	1,991	2,096	2,182	2,270
3 - Great Glen / Kibworth	2,092	2,128	2,241	2,332	2,427
4 - Market Harborough	1,970	2,004	2,110	2,196	2,285
5 - Clipton / Brixworth	1,988	2,022	2,129	2,216	2,306
6 - Desborough / Rothwell	1,752	1,781	1,876	1,952	2,032

Sources:

Experian Local Expenditure 2022 (2022 prices)

Experian growth rates - Retail Planner Briefing Note 21 (February 2024)

Table 3 - Total food/beverage expenditure (£M)

Zone	2024	2026	2031	2036	2041
1 - Lutterworth	39.07	40.00	42.80	45.26	47.84
2 - Broughton Astley / Fleckney	37.54	38.52	41.45	44.06	46.81
3 - Great Glen / Kibworth	46.02	48.01	53.71	59.18	65.00
4 - Market Harborough	53.27	54.97	59.96	64.56	69.43
5 - Clipton / Brixworth	25.53	26.63	29.53	32.07	34.62
6 - Desborough / Rothwell	48.44	50.16	54.83	58.88	63.04
Total	249.87	258.28	282.28	304.00	326.74

Source: Tables 1 and 2

Table 4 - Base year 2024 food / beverage market shares by zone (%)

	1	2	3	4	5	6	Inflow
	Lutterworth	Broughton Astley	Great Glen / Kibworth	Market Harborough	Clipton / Brixworth	Desborough / Rothwell	
Zone 1 - Lutterworth	22.3%	2.8%	0.0%	0.0%	1.9%	0.0%	5.0%
Zone 1 - other	20.0%	1.9%	2.2%	0.0%	1.9%	0.0%	5.0%
Zone 2 - Broughton Astley	3.4%	23.3%	0.1%	0.0%	0.0%	0.0%	5.0%
Zone 2 - Fleckney	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	5.0%
Zone 2 - other	2.0%	10.0%	3.4%	0.0%	0.0%	0.0%	5.0%
Zone 3 - Great Glen	0.0%	0.0%	2.7%	0.2%	0.0%	0.0%	5.0%
Zone 3 - Kibworth	0.0%	0.0%	12.5%	0.0%	0.5%	0.0%	5.0%
Zone 3 - Other	1.5%	2.1%	17.2%	6.2%	1.8%	5.4%	5.0%
Zone 4 - Market Harborough	14.8%	6.3%	17.5%	74.6%	20.7%	33.0%	5.0%
Harborough District total	64.0%	46.8%	55.6%	81.1%	26.8%	38.4%	n/a
Zone 5 - Brixworth	0.0%	0.0%	0.0%	0.0%	9.9%	0.0%	n/a
Zone 5 - other	1.1%	0.0%	0.1%	0.5%	8.0%	3.1%	n/a
Zone 6 - Desborough	0.6%	2.8%	0.0%	0.0%	0.0%	3.8%	n/a
Zone 6 - Rothwell	0.0%	0.0%	0.0%	0.0%	0.0%	6.9%	n/a
Zone 6 - other	0.0%	0.6%	2.1%	0.4%	0.0%	10.6%	n/a
Other study area total	1.7%	3.4%	2.3%	0.9%	17.9%	24.4%	n/a
Corby	0.0%	0.0%	3.3%	1.8%	0.0%	6.3%	n/a
Coventry	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	n/a
Hinckley	3.1%	1.4%	0.0%	1.9%	0.0%	0.0%	n/a
Kettering	2.1%	0.0%	0.0%	0.3%	0.5%	15.3%	n/a
Leicester/Blaby/Oadby/Wigston	11.6%	18.0%	20.1%	5.2%	4.5%	0.0%	n/a
Northampton	0.0%	0.0%	0.1%	2.9%	21.4%	5.0%	n/a
Rugby	2.8%	1.6%	0.0%	0.0%	1.3%	0.0%	n/a
Wellingborough	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	n/a
Elsewhere	12.1%	28.8%	18.6%	6.0%	27.5%	10.5%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey April 2024 and Lichfields' analysis.

Table 5 - Base year 2024 food / beverage expenditure patterns by zone (£M)

	1	2	3	4	5	6	Inflow	Total
	Lutterworth	Broughton Astley	Great Glen / Kibworth	Market Harborough	Clipton / Brixworth	Desborough / Rothwell		
Expenditure 2024	39.07	37.54	46.02	53.27	25.53	48.44		249.87
Zone 1 - Lutterworth	8.72	1.05	0.00	0.00	0.48	0.00	0.54	10.80
Zone 1 - other	7.79	0.70	1.02	0.00	0.48	0.00	0.53	10.53
Zone 2 - Broughton Astley	1.34	8.74	0.06	0.00	0.00	0.00	0.53	10.68
Zone 2 - Fleckney	0.00	0.19	0.00	0.00	0.00	0.00	0.01	0.20
Zone 2 - other	0.79	3.75	1.57	0.00	0.00	0.00	0.32	6.43
Zone 3 - Great Glen	0.00	0.00	1.23	0.12	0.00	0.00	0.07	1.41
Zone 3 - Kibworth	0.00	0.00	5.77	0.00	0.13	0.00	0.31	6.21
Zone 3 - Other	0.60	0.78	7.91	3.31	0.46	2.61	0.82	16.49
Zone 4 - Market Harborough	5.77	2.35	8.05	39.76	5.29	15.99	4.06	81.27
Harborough District total	25.02	17.57	25.61	43.19	6.83	18.60	7.20	144.02
Zone 5 - Brixworth	0.00	0.00	0.00	0.00	2.52	0.00	n/a	2.52
Zone 5 - other	0.41	0.00	0.06	0.27	2.05	1.52	n/a	4.32
Zone 6 - Desborough	0.23	1.05	0.00	0.00	0.00	1.85	n/a	3.13
Zone 6 - Rothwell	0.00	0.00	0.00	0.00	0.00	3.32	n/a	3.32
Zone 6 - other	0.00	0.21	0.97	0.19	0.00	5.14	n/a	6.52
Other study area total	0.65	1.27	1.04	0.46	4.56	11.83	n/a	19.82
Corby	0.00	0.00	1.53	0.94	0.00	3.04	n/a	5.52
Coventry	1.00	0.00	0.00	0.00	0.00	0.00	n/a	1.00
Hinckley	1.21	0.54	0.00	1.00	0.00	0.00	n/a	2.75
Kettering	0.81	0.00	0.00	0.15	0.13	7.43	n/a	8.53
Leicester/Blaby/Oadby/Wigston	4.55	6.76	9.23	2.77	1.15	0.00	n/a	24.46
Northampton	0.00	0.00	0.06	1.54	5.46	2.42	n/a	9.49
Rugby	1.11	0.59	0.00	0.00	0.34	0.00	n/a	2.04
Wellingborough	0.00	0.00	0.00	0.00	0.04	0.00	n/a	0.04
Elsewhere	4.71	10.82	8.55	3.21	7.01	5.11	n/a	39.41
TOTAL	39.07	37.54	46.02	53.27	25.53	48.44	n/a	257.07

Source: Tables 3 and 4

Table 6 - Future 2026 food / beverage expenditure patterns by zone (£M)

	1	2	3	4	5	6	Inflow	Total
	Lutterworth	Broughton Astley	Great Glen / Kibworth	Market Harborough	Clipton / Brixworth	Desborough / Rothwell		
Expenditure 2026	40.00	38.52	48.01	54.97	26.63	50.16		258.28
Zone 1 - Lutterworth	8.93	1.08	0.00	0.00	0.50	0.00	0.55	11.06
Zone 1 - other	7.98	0.72	1.07	0.00	0.50	0.00	0.54	10.81
Zone 2 - Broughton Astley	1.37	8.97	0.07	0.00	0.00	0.00	0.55	10.96
Zone 2 - Fleckney	0.00	0.19	0.00	0.00	0.00	0.00	0.01	0.20
Zone 2 - other	0.81	3.85	1.63	0.00	0.00	0.00	0.33	6.62
Zone 3 - Great Glen	0.00	0.00	1.28	0.12	0.00	0.00	0.07	1.47
Zone 3 - Kibworth	0.00	0.00	6.02	0.00	0.13	0.00	0.32	6.47
Zone 3 - Other	0.62	0.81	8.25	3.41	0.48	2.70	0.86	17.12
Zone 4 - Market Harborough	5.91	2.41	8.40	41.03	5.51	16.56	4.20	84.02
Harborough District total	25.61	18.03	26.71	44.56	7.13	19.26	7.44	148.74
Zone 5 - Brixworth	0.00	0.00	0.00	0.00	2.63	0.00	n/a	2.63
Zone 5 - other	0.42	0.00	0.07	0.28	2.13	1.58	n/a	4.49
Zone 6 - Desborough	0.24	1.08	0.00	0.00	0.00	1.91	n/a	3.23
Zone 6 - Rothwell	0.00	0.00	0.00	0.00	0.00	3.44	n/a	3.44
Zone 6 - other	0.00	0.22	1.02	0.20	0.00	5.32	n/a	6.76
Other study area total	0.66	1.30	1.08	0.48	4.76	12.26	n/a	20.55
Corby	0.00	0.00	1.60	0.97	0.00	3.15	n/a	5.72
Coventry	1.03	0.00	0.00	0.00	0.00	0.00	n/a	1.03
Hinckley	1.24	0.55	0.00	1.04	0.00	0.00	n/a	2.82
Kettering	0.83	0.00	0.00	0.16	0.13	7.70	n/a	8.82
Leicester/Blaby/Oadby/Wigston	4.66	6.93	9.63	2.85	1.20	0.00	n/a	25.28
Northampton	0.00	0.00	0.07	1.59	5.70	2.51	n/a	9.86
Rugby	1.14	0.61	0.00	0.00	0.35	0.00	n/a	2.10
Wellingborough	0.00	0.00	0.00	0.00	0.04	0.00	n/a	0.04
Elsewhere	4.83	11.10	8.92	3.31	7.32	5.29	n/a	40.76
TOTAL	40.00	38.52	48.01	54.97	26.63	50.16	n/a	265.72

Source: Tables 3 and 4

Table 7 - Future 2031 food / beverage expenditure patterns by zone (£M)

	1	2	3	4	5	6	Inflow	Total
	Lutterworth	Broughton Astley	Great Glen / Kibworth	Market Harborough	Clipton / Brixworth	Desborough / Rothwell		
Expenditure 2031	42.80	41.45	53.71	59.96	29.53	54.83		282.28
Zone 1 - Lutterworth	9.56	1.16	0.00	0.00	0.56	0.00	0.59	11.87
Zone 1 - other	8.54	0.77	1.19	0.00	0.56	0.00	0.58	11.65
Zone 2 - Broughton Astley	1.47	9.65	0.08	0.00	0.00	0.00	0.59	11.79
Zone 2 - Fleckney	0.00	0.21	0.00	0.00	0.00	0.00	0.01	0.22
Zone 2 - other	0.87	4.14	1.83	0.00	0.00	0.00	0.36	7.20
Zone 3 - Great Glen	0.00	0.00	1.43	0.13	0.00	0.00	0.08	1.65
Zone 3 - Kibworth	0.00	0.00	6.73	0.00	0.15	0.00	0.36	7.24
Zone 3 - Other	0.66	0.87	9.23	3.72	0.53	2.95	0.95	18.90
Zone 4 - Market Harborough	6.32	2.59	9.40	44.76	6.12	18.10	4.59	91.88
Harborough District total	27.41	19.40	29.88	48.61	7.91	21.05	8.12	162.39
Zone 5 - Brixworth	0.00	0.00	0.00	0.00	2.91	0.00	n/a	2.91
Zone 5 - other	0.45	0.00	0.08	0.31	2.37	1.73	n/a	4.93
Zone 6 - Desborough	0.26	1.16	0.00	0.00	0.00	2.09	n/a	3.51
Zone 6 - Rothwell	0.00	0.00	0.00	0.00	0.00	3.76	n/a	3.76
Zone 6 - other	0.00	0.24	1.14	0.21	0.00	5.82	n/a	7.41
Other study area total	0.71	1.40	1.21	0.52	5.28	13.39	n/a	22.52
Corby	0.00	0.00	1.79	1.06	0.00	3.44	n/a	6.29
Coventry	1.10	0.00	0.00	0.00	0.00	0.00	n/a	1.10
Hinckley	1.32	0.59	0.00	1.13	0.00	0.00	n/a	3.05
Kettering	0.89	0.00	0.00	0.17	0.15	8.41	n/a	9.62
Leicester/Blaby/Oadby/Wigston	4.99	7.46	10.77	3.11	1.34	0.00	n/a	27.67
Northampton	0.00	0.00	0.08	1.73	6.32	2.74	n/a	10.87
Rugby	1.22	0.66	0.00	0.00	0.39	0.00	n/a	2.26
Wellingborough	0.00	0.00	0.00	0.00	0.05	0.00	n/a	0.05
Elsewhere	5.16	11.95	9.97	3.61	8.11	5.78	n/a	44.60
TOTAL	42.80	41.46	53.71	59.96	29.53	54.83	n/a	290.41

Source: Tables 3 and 4

Table 8 - Future 2036 food / beverage expenditure patterns by zone (£M)

	1	2	3	4	5	6	Inflow	Total
	Lutterworth	Broughton Astley	Great Glen / Kibworth	Market Harborough	Clipton / Brixworth	Desborough / Rothwell		
Expenditure 2036	45.26	44.06	59.18	64.56	32.07	58.88		304.00
Zone 1 - Lutterworth	10.10	1.24	0.00	0.00	0.60	0.00	0.63	12.57
Zone 1 - other	9.03	0.82	1.31	0.00	0.61	0.00	0.62	12.39
Zone 2 - Broughton Astley	1.55	10.26	0.08	0.00	0.00	0.00	0.63	12.52
Zone 2 - Fleckney	0.00	0.22	0.00	0.00	0.00	0.00	0.01	0.23
Zone 2 - other	0.92	4.41	2.01	0.00	0.00	0.00	0.39	7.72
Zone 3 - Great Glen	0.00	0.00	1.58	0.14	0.00	0.00	0.09	1.81
Zone 3 - Kibworth	0.00	0.00	7.42	0.00	0.16	0.00	0.40	7.98
Zone 3 - Other	0.70	0.92	10.17	4.01	0.57	3.17	1.03	20.57
Zone 4 - Market Harborough	6.68	2.75	10.35	48.19	6.64	19.44	4.95	99.01
Harborough District total	28.98	20.62	32.93	52.34	8.58	22.61	8.74	174.80
Zone 5 - Brixworth	0.00	0.00	0.00	0.00	3.16	0.00	n/a	3.16
Zone 5 - other	0.48	0.00	0.08	0.33	2.57	1.85	n/a	5.32
Zone 6 - Desborough	0.27	1.24	0.00	0.00	0.00	2.24	n/a	3.75
Zone 6 - Rothwell	0.00	0.00	0.00	0.00	0.00	4.04	n/a	4.04
Zone 6 - other	0.00	0.25	1.25	0.23	0.00	6.25	n/a	7.98
Other study area total	0.75	1.49	1.34	0.56	5.74	14.38	n/a	24.26
Corby	0.00	0.00	1.97	1.14	0.00	3.69	n/a	6.81
Coventry	1.16	0.00	0.00	0.00	0.00	0.00	n/a	1.16
Hinckley	1.40	0.63	0.00	1.22	0.00	0.00	n/a	3.25
Kettering	0.94	0.00	0.00	0.19	0.16	9.04	n/a	10.32
Leicester/Blaby/Oadby/Wigston	5.27	7.93	11.87	3.35	1.45	0.00	n/a	29.87
Northampton	0.00	0.00	0.08	1.87	6.86	2.95	n/a	11.75
Rugby	1.29	0.70	0.00	0.00	0.42	0.00	n/a	2.41
Wellingborough	0.00	0.00	0.00	0.00	0.05	0.00	n/a	0.05
Elsewhere	5.46	12.70	10.99	3.89	8.81	6.21	n/a	48.06
TOTAL	45.26	44.07	59.18	64.56	32.07	58.88	n/a	312.75

Source: Tables 3 and 4

Table 9 - Future 2041 food / beverage expenditure patterns by zone (£M)

	1	2	3	4	5	6	Inflow	Total
	Lutterworth	Broughton Astley	Great Glen / Kibworth	Market Harborough	Clipton / Brixworth	Desborough / Rothwell		
Expenditure 2041	47.84	46.81	65.00	69.43	34.62	63.04		326.74
Zone 1 - Lutterworth	10.68	1.31	0.00	0.00	0.65	0.00	0.67	13.31
Zone 1 - other	9.54	0.87	1.44	0.00	0.66	0.00	0.66	13.18
Zone 2 - Broughton Astley	1.64	10.90	0.09	0.00	0.00	0.00	0.67	13.30
Zone 2 - Fleckney	0.00	0.23	0.00	0.00	0.00	0.00	0.01	0.25
Zone 2 - other	0.97	4.68	2.21	0.00	0.00	0.00	0.41	8.27
Zone 3 - Great Glen	0.00	0.00	1.73	0.15	0.00	0.00	0.10	1.98
Zone 3 - Kibworth	0.00	0.00	8.15	0.00	0.17	0.00	0.44	8.76
Zone 3 - Other	0.74	0.98	11.17	4.31	0.62	3.40	1.12	22.33
Zone 4 - Market Harborough	7.06	2.93	11.37	51.83	7.17	20.81	5.32	106.49
Harborough District total	30.63	21.91	36.16	56.29	9.27	24.21	9.39	187.87
Zone 5 - Brixworth	0.00	0.00	0.00	0.00	3.42	0.00	n/a	3.42
Zone 5 - other	0.51	0.00	0.09	0.35	2.77	1.98	n/a	5.71
Zone 6 - Desborough	0.29	1.32	0.00	0.00	0.00	2.40	n/a	4.00
Zone 6 - Rothwell	0.00	0.00	0.00	0.00	0.00	4.33	n/a	4.33
Zone 6 - other	0.00	0.27	1.38	0.25	0.00	6.69	n/a	8.58
Other study area total	0.79	1.58	1.47	0.60	6.19	15.40	n/a	26.04
Corby	0.00	0.00	2.17	1.23	0.00	3.95	n/a	7.35
Coventry	1.23	0.00	0.00	0.00	0.00	0.00	n/a	1.23
Hinckley	1.48	0.67	0.00	1.31	0.00	0.00	n/a	3.46
Kettering	0.99	0.00	0.00	0.20	0.17	9.68	n/a	11.04
Leicester/Blaby/Oadby/Wigston	5.57	8.43	13.04	3.60	1.57	0.00	n/a	32.20
Northampton	0.00	0.00	0.09	2.01	7.40	3.15	n/a	12.66
Rugby	1.36	0.74	0.00	0.00	0.45	0.00	n/a	2.56
Wellingborough	0.00	0.00	0.00	0.00	0.05	0.00	n/a	0.05
Elsewhere	5.77	13.49	12.07	4.18	9.51	6.65	n/a	51.68
TOTAL	47.84	46.82	65.00	69.43	34.62	63.04	n/a	336.14

Source: Tables 3 and 4

Table 10 - Summary of food / beverage expenditure 2024 to 2041 (£m)

	2024	2026	2031	2036	2041
Available expenditure					
Zone 1 - Lutterworth	10.80	11.06	11.87	12.57	13.31
Zone 1 - other	10.53	10.81	11.65	12.39	13.18
Zone 2 - Broughton Astley	10.68	10.96	11.79	12.52	13.30
Zone 2 - Fleckney	0.20	0.20	0.22	0.23	0.25
Zone 2 - other	6.43	6.62	7.20	7.72	8.27
Zone 3 - Great Glen	1.41	1.47	1.65	1.81	1.98
Zone 3 - Kibworth	6.21	6.47	7.24	7.98	8.76
Zone 3 - Other	16.49	17.12	18.90	20.57	22.33
Zone 4 - Market Harborough	81.27	84.02	91.88	99.01	106.49
Total	144.02	148.74	162.39	174.80	187.87
Turnover of existing facilities					
Zone 1 - Lutterworth	10.80	10.85	11.09	11.20	11.31
Zone 1 - other	10.53	10.58	10.81	10.92	11.03
Zone 2 - Broughton Astley	10.68	10.74	10.97	11.08	11.20
Zone 2 - Fleckney	0.20	0.20	0.20	0.21	0.21
Zone 2 - other	6.43	6.46	6.61	6.67	6.74
Zone 3 - Great Glen	1.41	1.42	1.45	1.47	1.48
Zone 3 - Kibworth	6.21	6.24	6.38	6.44	6.51
Zone 3 - Other	16.49	16.58	16.94	17.11	17.28
Zone 4 - Market Harborough	81.27	81.68	83.49	84.33	85.18
Total	144.02	144.74	147.95	149.44	150.94
Surplus/deficit expenditure					
Zone 1 - Lutterworth	-	0.21	0.78	1.37	2.00
Zone 1 - other	-	0.23	0.83	1.47	2.14
Zone 2 - Broughton Astley	-	0.22	0.81	1.44	2.11
Zone 2 - Fleckney	-	0.00	0.02	0.03	0.04
Zone 2 - other	-	0.16	0.59	1.05	1.53
Zone 3 - Great Glen	-	0.05	0.19	0.34	0.50
Zone 3 - Kibworth	-	0.24	0.87	1.54	2.25
Zone 3 - Other	-	0.54	1.96	3.46	5.04
Zone 4 - Market Harborough	-	2.34	8.38	14.68	21.32
Total	-	4.00	14.43	25.37	36.93

Source: Tables 5 to 9 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Leisure Figure 2

Table 11 - Food / beverage floorspace capacity up to 2041 (cumulative)

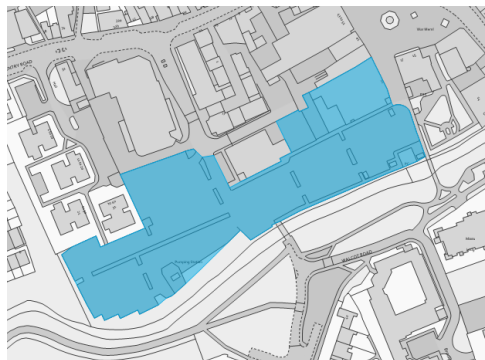
	2024	2026	2031	2036	2041
Turnover density new floorspace (£ per sq m)	£6,000	£6,030	£6,164	£6,226	£6,288
Floorspace projection (sq.m gross)					
Zone 1 - Lutterworth	0	36	126	220	318
Zone 1 - other	0	38	135	236	341
Zone 2 - Broughton Astley	0	37	132	231	335
Zone 2 - Fleckney	0	1	2	4	6
Zone 2 - other	0	27	96	168	244
Zone 3 - Great Glen	0	9	31	55	80
Zone 3 - Kibworth	0	39	140	247	358
Zone 3 - Other	0	90	318	555	802
Zone 4 - Market Harborough	0	388	1,360	2,358	3,390
Total	0	664	2,342	4,075	5,873

Source: Table 10 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Leisure Figure 2.


Appendix 6 Household survey results

Appendix 7 Potential site allocations

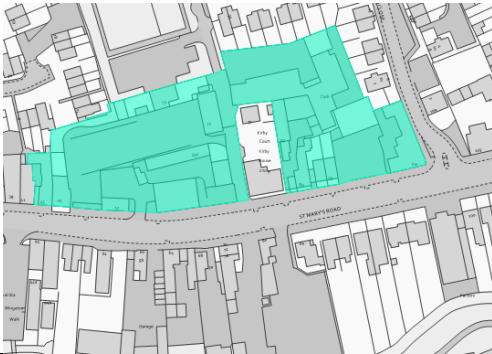
The Commons Car Park, Market Harborough

	<p>Policy RT1 – site allocated in the adopted Local Plan for mixed use development including retail and town centre uses.</p> <p>The site comprises the public surface car park accessed from Coventry Road and includes a Tesco Express store fronting on to The Square.</p> <p>The site is adjacent to Co-op and Poundland stores and the River Wellland.</p>
Evaluation criteria	Comments
Linkages with centre	Located inside the town centre boundary and the Tesco store is within the PSA. Good pedestrian linkages to The Square, but poor visibility from the rest of the town centre and lacks direct road frontage.
Availability	Short to medium term 5 -10 years: Council owned surface car park could be made available for development, but the Tesco store appears to be unavailable for the foreseeable future.
Likely type of development	Potential extensions to Co-op and/or Tesco Express stores now appear unlikely, based on their normal store business models. The southwest part of the surface car park could still accommodate freestanding retail, food/beverage or leisure uses, perhaps benefitting from the River Wellland location.
Scale of development	Policy RT1 assumed mixed use development would deliver a net increase in retail floorspace of at least 1,500 sq.m gross. Retail, leisure and or food beverage uses on the southwest part of the surface car park could still accommodate at least 1,000 sq.m gross.
Commercial potential	Despite the lack of road frontage and visibility, commercial uses adjacent to retained public car parking should be viable and an attractive trading location.
Development constraints	<p>Within the Conservation Area and adjacent to the River Wellland. Proposals to install an EV charging hub near the Co-op store and an Anglian Water Flood Alleviation tank sited under part of car park will reduce the developable area.</p> <p>Development of the southwest part of the surface car park would result in the loss of around 80 car parking spaces, which may need to be replaced elsewhere in the town centre.</p>
Development prospects	Good (in relation to the southwest part of the car park)

Land off High Street, Market Harborough

	<p>Policy RT1 – site allocated in the adopted Local Plan for mixed use development including retail and town centre uses.</p> <p>This site is located to the rear of shop buildings fronting on to the High Street and was previously identified in 2013 as under-utilised with low density uses, comprising back-land areas to the east of School Lane including a small public car park, service yards and vacant warehouse buildings. The small car park and some of the vacant warehouses and back-land areas has since been developed for residential uses and are no longer available.</p>
Evaluation criteria	Comments
Linkages with centre	Located inside the town centre boundary and part within the PSA. Good pedestrian linkages to the High Street.
Availability	Most parts of the allocated site have now been developed for residential use and are no longer available for development.
Likely type of development	Only a small-scale extension in the Talbot Yard area now appears physically feasible for town centre uses within the area originally allocated for mixed use development.
Scale of development	Policy RT1 assumed mixed use development would deliver a net increase in retail floorspace of at least 2,000 sq.m gross. Due to recent developments described above, there appears to be limited remaining potential for an uplift in retail and town centre use floorspace.
Commercial potential	Back-land areas were previously identified as suitable for small secondary retail units with residential above. This potential has now been lost due to residential led developments.
Development constraints	Allocated area is still in multiple ownerships. Comprehensive redevelopment is unlikely to be financially viable due to recent residential development.
Development prospects	Poor (now unavailable for development)

Land off St Mary's Road, Market Harborough

	<p>Policy RT4 - allocated in the adopted Local Plan for leisure, entertainment and tourism uses.</p> <p>The area contains a mix of retail, food/beverage, commercial and employment uses with private car parks/services yards. Key occupiers include Kwik Fit, the Eco Village and the Freemasons Arms.</p>
Evaluation criteria	Comments
Linkages with centre	Located inside the town centre boundary about 100 metres to the west of the PSA. Good pedestrian linkages to the High Street, along St Mary's Road.
Availability	The allocated area appears to be in multiple ownerships and predominantly occupied. Potentially only available for comprehensive redevelopment in the long-term (10 years +) if the area can be assembled. Smaller plots could become available in the short to medium term for smaller scale development/changes of use.
Likely type of development	Changes of use or pockets of small-scale development or comprehensive redevelopment.
Scale of development	Policy RT4 assumed a mixed-use scheme would deliver at least 3,000 sq.m gross including some or all of the following uses: food/beverage, hotel D2 assembly and leisure.
Commercial potential	Main route into the town centre with excellent access and main road frontage.
Development constraints	<p>Development needs to be sensitively designed to protect the Listed Buildings at 91-93 St Mary's Road and their setting.</p> <p>The allocated area appears to be in multiple ownerships and is occupied.</p>
Development prospects	<p>Reasonable</p> <p>Short-term: small scale infill development.</p> <p>Longer-term: comprehensive redevelopment.</p>

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