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Nuneaton and Bedworth Borough Council:

Retail and Leisure Study Update 2014

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1.0 INTRODUCTION

- 1.1 Strategic Perspectives (SP) was commissioned by Nuneaton and Bedworth Borough Council (NBBC) to update the quantitative capacity and qualitative needs assessments for retail and leisure uses, specifically focussing on the main town centres of Nuneaton and Bedworth.
- 1.2 As part of the same commission, DTZ has carried out a *Town Centre Office Requirement Update* to assist NBBC in developing clear and realistic planning policies relating to new office provision in Nuneaton and Bedworth Town Centres. The DTZ report is published separately to this *Retail and Leisure Study Update*.
- 1.3 This study comprises a number of key outputs:
- **Planning Policy Overview** - of the key national and development plan policies relevant to retail, leisure and town centre uses, and other material considerations.
 - **Market Trends Review** – of the major changes in the retail and leisure sectors over the last decade; the impact of these changes and the economic downturn on town centres and high streets; and the prospects for future growth and development.
 - **Health Check Assessments** - of Nuneaton and Bedworth Town Centres based on a number of key performance indicators (KPIs) that in combination help to determine their current vitality and viability, and any significant changes in their performance over recent years.
 - **Retail Capacity Assessment** – of the quantitative need for new retail (convenience and comparison goods) floorspace over the development plan period (up to 2028) based on the most current population and expenditure forecasts provided by Experian Business Strategies (EBS) and Oxford Economics.
 - **Leisure Needs Assessment** –to identify any key changes and ‘gaps’ in the leisure offer of Nuneaton and Bedworth Town Centres, and the Borough as a whole, based on a combination of quantitative and qualitative research.
- 1.4 The study updates and supersedes the *Town Centres Study* (June 2011) prepared for the Council by Roger Tym and Partners (RTP), and the *Convenience Goods Retail Study* (June 2011) prepared by Strategic Perspectives.
- 1.5 The study is informed by a wide range of primary and secondary research, and robust datasets commonly used to inform retail and commercial leisure capacity (and impact) assessments (including, for example, Experian *Goad Town Centre Reports*). A separate stakeholder consultation and workshop was also carried out for both town centres on 16th May 2013 to help inform the research and study findings.
- 1.6 The quantitative and qualitative assessments have been informed by the results of the telephone interview survey of some 1,000 households carried out by NEMS Market Research (NEMS) during August 2010. This survey informed the *2011 Convenience*

Goods Retail Study. The survey questionnaire was designed by SP, working in partnership with the Council (**Appendix 1**)¹. The survey helped to establish 'baseline' shopping patterns for both comparison and convenience goods purchases, as well as household leisure preferences and views on whether (and how) provision in Nuneaton and Bedworth Town Centres could be improved.

- 1.7 Since the survey was conducted there has been limited new retail floorspace developed and opened in the Borough, apart from the new replacement Tesco Extra store in Bedworth (opened in December 2012). In our judgement the survey provided a robust 'baseline' position for the purpose of this updated retail assessment to help determine shopping patterns and market shares across the defined study ('catchment') area and zones. Notwithstanding this it has been necessary to review and update the market shares for both convenience and comparison goods at 2013 (the 'base year') to take account of the impact of the new replacement Tesco store. These revisions and updates are explained in more detail in **Sections 6 and 7**.
- 1.8 This updated study has been prepared in the context of current and emerging national and development plan policy guidance. It specifically takes into account the advice set out in the National Planning Policy Framework (NPPF) published in March 2012 relating to plan-making. The study has also been informed by other key material considerations, including the *National Planning Practice Guidance* (NPPG) which was published online in March 2014 and replaced the previous PPS4 *Practice Guidance on Need, Impact and the Sequential Approach*.
- 1.9 The overall aim of this study is to provide the Council with a robust and deliverable needs assessment that will help to maximise the potential of the Borough's main town centres as places to live, work, shop and visit for a range of activities. In turn, this will ensure their long term vitality and viability as attractive, competitive and sustainable locations in accordance with the key objectives of the NPPF.
- 1.10 It is important to state at the outset that, in our experience, capacity forecasts beyond five years should be interpreted with caution. Indeed, in the context of the current economic downturn, even forecasts beyond two-three years could be subject to change. We therefore advise the Council that although this updated study does provide the robust evidence base required to help inform plan-making, site allocations and the determination of planning applications, the forecasts should be constantly monitored and updated to take into account any significant changes in retail expenditure and population growth forecasts over time, as well as any potential impacts arising from other key trends in the retail sector (such as, for example, the growth in internet shopping).
- 1.11 For ease of reference, the report is structured as follows:

¹ Please note that the detailed household survey results and tabulations are not appended to this report, but can be obtained from the Council.

- **Section 2** reviews the national, regional and local planning policy context material to retail, commercial leisure and town centre matters. This provides the framework for this study.
 - **Section 3** highlights some of the key trends that are driving the dynamic changes in the retail sector and how this has shaped (and is likely to shape) the UK's urban and retail landscape.
 - **Section 4 and 5** highlights the findings of health check assessments undertaken for Nuneaton and Bedworth Town Centres.
 - **Section 6** defines the study (catchment) area and sets out the market share analysis informed by the 2010 household telephone interview survey.
 - **Section 7** describes the key inputs of the economic (capacity) assessment for comparison and convenience goods retailing and sets out the forecast residual expenditure and capacity forecasts for the Borough up to 2028 (the development plan period) and beyond, to 2031.
 - **Section 8** sets out the findings of the Borough-wide leisure needs ('gap') assessment, and looks at potential opportunities to improve the leisure provision in Nuneaton and Bedworth Town Centres over time.
- 1.12 Finally, **Section 9** draws together the key findings of the retail and commercial leisure needs assessments and sets out the overall conclusions and recommendations.

2.0 PLANNING POLICY CONTEXT

2.1 This section briefly reviews the national and local development plan planning policy context material to the consideration and assessment of retail, commercial leisure and town centre uses in the Borough and its two main centres.

NATIONAL PLANNING POLICY FRAMEWORK (NPPF)

2.2 The NPPF was published in March 2012 and supersedes all previous national planning policy statements and guidance. It reinforces the importance of up-to-date plans and strengthens local decision making. The NPPF must therefore be taken into account in the preparation of Local Plans² and Neighbourhood Plans³.

2.3 At the heart of the NPPF is a presumption in favour of sustainable development, which is seen as *"a golden thread running through both plan-making and decision-taking"* (paragraph 14). Sustainable development is defined as meeting the needs of the present without compromising the ability of future generations to meet their own needs. The NPPF sets out the Government's view of what sustainable development means in practice for the planning system. There are *"three dimensions"* – economic, social and environmental – which give rise to the need for the planning system to perform a number of roles.

- For **plan-making** the NPPF (paragraph 14) states that local planning authorities (LPAs) should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change. This is unless any adverse impacts of doing so would significantly and demonstrably outweigh the benefits; either when assessed against the policies in the NPPF taken as a whole, or where specific policies indicate development should be restricted.
- For **decision-taking** (unless material considerations indicate otherwise) LPAs should approve development proposals that accord with the development plan without delay; and *"where the development plan is absent, silent or relevant policies are out-of-date, granting permission unless any adverse impacts of doing so would significantly and demonstrably outweigh the benefits"*; either when assessed against the policies in the NPPF taken as a whole, or where specific policies in the Framework indicate development should be restricted (the same as for plan-making).

² Defined by NPPF (Annex 2) as the plan for the future development of the local area, drawn up by the local planning authority in consultation with the community. In law this is described as the development plan documents adopted under the Planning and Compulsory Purchase Act 2004. Current Core Strategies or other planning policies, which under the regulations would be considered to be development plan documents, form part of the Local Plan. The term includes old policies which have been saved under the 2004 Act.

³ A plan prepared by a Parish Council or Neighbourhood Forum for a particular neighbourhood area (made under the Planning and Compulsory Purchase Act 2004).

- 2.4 The Framework states that policies in Local Plans should follow the approach of the presumption in favour of sustainable development so that: *"...it is clear that development which is sustainable can be approved without delay. All plans should be based upon and reflect the presumption in favour of sustainable development, with clear policies that will guide how the presumption should be applied locally"* (paragraph 15).

Core Planning Principles

- 2.5 The NPPF (paragraph 17) sets out 12 core planning principles that underpin both plan-making and decision-taking. Amongst other objectives these principles confirm that planning should:
- be genuinely plan-led, empowering local people to shape their surroundings, with succinct local and neighbourhood plans setting out a positive vision for the future of the area;
 - not simply be about scrutiny, but instead be a creative exercise in finding ways to enhance and improve the places in which people live their lives;
 - proactively drive and support sustainable economic development to deliver homes, business and industrial units, infrastructure and thriving local places;
 - always seek to secure high quality design and a good standard of amenity for all existing and future occupants of land and buildings;
 - encourage the effective use of land by reusing land that has been previously developed (brownfield land), provided that it is not of high environmental value;
 - promote mixed use developments, and encourage multiple benefits from the use of land in urban and rural areas;
 - actively manage patterns of growth to make the fullest possible use of public transport, walking and cycling, and focus significant development in locations which are or can be made sustainable; and
 - take account of and support local strategies to improve health, social and cultural wellbeing for all, and deliver sufficient community and cultural facilities and services to meet local needs.

Plan-Making

- 2.6 The NPPF (paragraph 150) emphasises that Local Plans are the key to delivering sustainable development that reflects the vision and aspirations of local communities. Local Plans should therefore be *"aspirational but realistic"*, and should set out the opportunities for development and clear policies on *"...what will or will not be permitted and where"* (paragraph 154). Only those policies that provide a clear indication of how

a decision maker should react to a development proposal should be included in the plan.

2.7 In broad terms the NPPF (paragraph 156) requires strategic priorities for the area covered by the Local Plan to deliver the homes, jobs, retail, leisure, health, educational, community, cultural and other facilities identified and needed. Crucially the NPPF (paragraph 157) indicates that Local Plans should, amongst other key requirements:

- plan positively for the development and infrastructure required in the area;
- be drawn up over an appropriate time scale (preferably 15 years), take account of longer term requirements and be kept up to date;
- indicate broad locations for strategic development on a key diagram and land-use designations on a proposals map;
- allocate sites to promote development and flexible use of land, bringing forward new land where necessary, and provide detail on form, scale, access and quantum of development where appropriate; and
- identify land where development would be inappropriate, for instance because of its environmental or historic significance.

2.8 In terms of the evidence-based approach to planning, the Framework states LPAs should ensure that the Local Plan is based on "*...adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area*" (paragraph 158). Furthermore the assessment of, and strategies for housing, employment and other uses should be integrated, and take full account of relevant market and economic signals. The NPPF (paragraph 161) also states that LPAs should work closely with the business community to understand their changing needs and identify and address barriers to investment. LPAs should use this evidence base to assess:

- the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;
- the existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs. Reviews of land available for economic development should be undertaken at the same time as, or combined with, *Strategic Housing Land Availability Assessments* (SHLAA) and should include a reappraisal of the suitability of previously allocated land;
- the role and function of town centres and the relationship between them, including any trends in the performance of centres;
- the capacity of existing centres to accommodate new town centre development;

- locations of deprivation which may benefit from planned remedial action; and
 - the needs of the food production industry and any barriers to investment that planning can resolve.
- 2.9 The NPPF is clear that pursuing sustainable development requires "*...careful attention to viability and costs in plan-making and decision-taking*" (paragraph 173). Plans should be deliverable and, in this context, sites and the scale of development identified in the plan should "*...not be subject to such a scale of obligations and policy burdens that their ability to be delivered viably is threatened*" (paragraph 173).
- 2.10 The Framework (paragraphs 18-149) sets out 13 key 'principles' for delivering sustainable development, including building a strong, competitive economy; ensuring the vitality of town centres; promoting sustainable transport; delivering a wide choice of high quality homes; requiring good design; promoting healthy communities; protecting Green Belt land; and conserving and enhancing the natural and historic environment. The following sets out some of the key considerations for plan-making and decision-taking that are material to retail planning and other main town centre uses.
- 2.11 The NPPF (paragraph 23) states that planning policies should be positive and promote competitive town centre⁴ environments, as well as setting out policies for the management and growth of centres over the plan period. When drawing up Local Plans, LPAs should:
- recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
 - define a network and hierarchy of centres that is resilient to anticipated future economic changes;
 - define the extent of town centres and primary shopping areas⁵, based on a clear definition of primary and secondary frontages⁶ in designated centres, and set policies that make clear which uses will be permitted in such locations;
 - promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
 - retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;

⁴ The NPPF (Annex 2) states that references to town centres or centres apply to city centres, town centres, district centres and local centres, but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

⁵ Primary shopping area is defined by the NPPF (Annex 2) as the defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).

⁶ The NPPF (Annex 2) states that 'primary frontages' are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. 'Secondary frontages' provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres;
- ensure that the needs for retail, leisure, office and other main town centre uses are "met in full" and "not compromised by limited site availability". Assessments should therefore be undertaken of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

Decision-Taking

- 2.12 The Framework addresses decision-taking in paragraphs 186-207. In summary the NPPF states that LPAs should "*...approach decision-taking in a positive way to foster the delivery of sustainable development. The relationship between decision-taking and plan-making should be seamless, translating plans into high quality development on the ground*" (paragraph 186). It continues that LPAs should "*...look for solutions rather than problems, and decision-takers at every level should seek to approve applications for sustainable development where possible*" (paragraph 187). LPAs are encouraged to work proactively with applicants to secure developments that improve the economic, social and environmental conditions of the area.
- 2.13 Applications for main town centre uses⁷ that are not in an existing centre and not in accordance with an up-to-date Local Plan should be subject to the sequential and impact 'tests'
- 2.14 The **sequential approach**⁸ requires applications for main town centre uses to be located in town centres first, then in edge-of-centre locations and only if suitable sites

⁷ NPPF (Annex 2) defines 'main town centre uses' as retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

are not available should out-of-centre sites be considered. When considering edge and out of centre proposals, "...preference should be given to accessible sites that are well connected to the town centre" (paragraph 24). Applicants and LPAs should demonstrate flexibility on issues such as format and scale. The sequential approach does not apply to small scale rural offices or other small scale rural development.

2.15 An **impact assessment** is also required if the development is over a proportionate, locally set floorspace threshold (or, if there is no locally set threshold, the default threshold is 2,500m² gross). The NPPF (paragraph 26) states that this should include assessment of the impact of the proposal:

- on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, "...the impact should also be assessed up to ten years from the time the application is made".

2.16 The NPPF (paragraph 27) states that "...where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the above factors, it should be refused".

DEVELOPMENT PLAN

2.17 The development plan for Nuneaton and Bedworth Borough Council comprises the adopted Local Plan (2006), the adopted Proposals Map (2006) and a raft of Supplementary Planning Guidance. Although eight saved policies of the Warwickshire Structure Plan (2001) remain part of the development plan, the Structure Plan along with the Regional Spatial Strategy is expected to be abolished in the near future.

Nuneaton and Bedworth Local Plan (2006)

2.18 The Nuneaton and Bedworth Local Plan was adopted in June 2006 and sets out the Council's vision for the future development of the Borough. The Local Plan was saved in its entirety for three years; however a number of policies were deleted in June 2009. Since then, the 'saved' Local Plan policies have represented the adopted Development Plan. The Local Plan was supported by Proposals Maps, also adopted in June 2006.

2.19 Chapter 5 ('Shopping') of the Local Plan identifies the current provision of existing retail facilities across the Borough and sets out the planning policies which will guide

⁸ This sequential approach should not be applied to applications for small scale rural offices or other small scale rural development.

future retail development proposals. The following 'saved' policies will be applicable to new retail development proposals:

- Policy S1 (Development in Town Centres);
- Policy S2 (Development in District and Local Centres);
- Policy S3 (Environmental Improvements to Shopping Centres);
- Policy S7 (A3-A5 Uses Outside Town/ District Centres);
- Policy S8 (A3, A4 & A5 Uses in Town / District Centres); and
- Policy S9 (Sui Generis Uses of Retail on Industrial Estates).

2.20 Chapter 5 defines the retail centres by the following hierarchy:

- **Town Centres:** Nuneaton, Bedworth;
- **District Centres:** Bulkington, Chapel End, Horeston Grange, Kingswood Road, Queens Road, Attleborough;
- **Local Centres:** Newton Road (Nuneaton), Bulkington Road (Bedworth), Nuneaton Road (Bedworth), Coventry Road (Bedworth), Arbury Road (Nuneaton), Heath End Road (Nuneaton), Smorrall Lane (Bedworth), Church Road (Nuneaton), Coventry Road/School Lane (Exhall), Tomkinson Road/Croft Road (Nuneaton), Abbey Green (Nuneaton), St. Nicolas Park Drive (Nuneaton), Copsewood Avenue (Nuneaton), Trelawney Road (Exhall), and Dark Lane.

2.21 The Local Plan proposes that there will be no requirement for retail expansion in either Nuneaton or Bedworth Town Centres over the Plan period. Consequently, no specific sites were allocated for retail development.

The Borough Plan

2.22 The Council are currently working towards a new Nuneaton and Bedworth Borough Plan which will set out the planning vision for the next 15 years. The Plan will include strategic objectives and policies to guide development over the plan period until 2028. The Plan will be accompanied by updated Proposals Maps. Once adopted, the Borough Plan will entirely supersede the 2006 Local Plan.

2.23 In June 2009, the Borough Plan *Issues and Option* document was published for public consultation. The Council have reviewed representations and are preparing to publish the *Preferred Options* for consultation, subject to a Cabinet meeting confirming the content of the document. At the time of writing the date for Cabinet and subsequent consultation could not be confirmed, although the consultation period is expected to run for eight weeks. Following consultation, the Council will undertake a review of the responses and will prepare a *Submission* version of the Plan. The Examination is anticipated to take place in 2014, and the Council have indicated that the Borough Plan should be adopted during the same year.

Core Strategy Issues and Options (June 2009)

- 2.24 Pending the publication of the *Preferred Options* document, the most recent version of the Borough Plan is the *Issues and Options* paper published for consultation in June 2009. Chapter 3 specifically invited comments on the “key issues” facing the Borough, including housing, the economy, education, town centres, leisure and transport.
- 2.25 For the Borough’s Town and District Centres the key issues identified included:
- addressing the poor quality and diversity of retail provision in Nuneaton;
 - retaining the attractive and competitive nature of the town market;
 - improving Nuneaton’s weak evening or night time economy;
 - enhancing the office provision in Nuneaton and improving residential accommodation;
 - enabling Bedworth to compete for retail trade and developing its office sector; and
 - varying the quality of the comparison and convenience shopping offer in the district and local centres.
- 2.26 With regard to leisure and recreation, the key issues identified were the underutilisation of the outdoor sports provision facilities; the lack of green corridors in Bulkington and to the south west of the Borough (impacting on biodiversity and limits opportunities for leisure activities); and the limited public accessibility to the Borough’s leisure facilities.
- 2.27 Chapter 4 (*Future Growth*) establishes the most appropriate strategy for accommodating the planned growth in the Borough. In summary, a significant amount of new development required up to 2026 (please note that 2026 was the timescale of the Plan during the *Issues and Options* stage) will be directed towards the Borough’s two main centres, as follows:
- **Nuneaton** is identified as a strategic town centre with the potential to accommodate an additional 25,000m² of retail space between 2006 and 2021, and a further 10,000m² between 2021 and 2026. Over this period, the town centre should also provide 30,000m² of new office accommodation.
 - Given that it is not a designated strategic centre, the amount of retail and office space provided in **Bedworth** should only be of a scale that addresses local need. It was proposed that new retail space should not exceed 10,000m².
- 2.28 The *Issues and Options* paper assessed and identified the options for addressing the key issues in order to assist in delivering the vision and objectives. The majority of these options assumed that the existing urban areas of Nuneaton, Bedworth and Bulkington would be capable of accommodating future growth. Alternative options

proposed that growth should be principally directed towards Coventry, with Nuneaton and Bedworth supporting an element of growth.

- 2.29 Finally, the *Issues and Options* stage did not invite representations on specific sites, but instead only sought to identify broad locations suitable for accommodating future growth and development.

SUMMARY

- 2.30 This section has provided an overview of the national and local planning policy context material to plan-making and the determination of new retail and town centre uses.
- 2.31 The underlying objective of policy at all levels is to maintain and enhance the vitality and viability of town centres, and to promote new development in town centre locations "first" in accordance with the sequential approach.
- 2.32 The NPPF and the Council's development plan provide an important context for this Retail and Leisure Study Update.

3.0 RETAIL & LEISURE TRENDS

- 3.1 Britain's retail and urban 'landscape' has changed dramatically since the 1980s. The changes in the location of new retail and leisure development, and the dynamic shifts in the nation's shopping and leisure habits have largely been shaped by the complex interaction of policy, economic, social, consumer lifestyle and investment trends. In turn, these trends have had a significant impact on the vitality and viability of our town centres, and need to be taken into account when considering future needs, identifying sites, preparing robust strategies and policies, and assessing the impact of new development.
- 3.2 This section summarises some of the key trends that have driven change in the retail sector over the last three decades, and will continue to shape change in the future.

RETAIL TRENDS

Consumer Spending

- 3.3 Following an unprecedented period of growth in consumer spending since the mid-1990s, the onset of the economic recession in 2007/08 had a dramatic impact on consumer spending and market demand. The table below sets out the latest research on actual and forecast expenditure per capita growth rates for the main categories of retail spending between 2005 and 2030 prepared by Experian Business Strategies (EBS). These forecasts help to inform retail capacity and impact assessments.

Table 3.1 Growth in UK Retail Spend per Head (% change), 2008 - 2030

Volume Growth per head (%):	ACTUAL GROWTH-----:					FORECAST GROWTH-----:			
	2008	2009	2010	2011	2012	2013	2014	2015	2016-2030
Retail Spend	1.1	-3.2	1.0	-0.7	1.7	1.8	1.4	1.9	2.3
Convenience Goods:	-3.5	-4.1	-0.4	-2.3	-0.6	-0.6	-0.3	0.1	0.8
Comparison Goods:	3.3	-3.0	1.9	0.3	3.1	3.2	2.3	2.8	3.0

Source: Experian Retail Planner Briefing Note 11 (October 2013) Figures 1a and 1b.

- 3.4 As the table show, there has been limited growth in retail (convenience and comparison goods) expenditure per head since 2008. Although there have been positive signs of improvement in the economy during 2013, the retail sector remains fragile. Analysts forecast that the retailing will continue to struggle over the short to medium term. Business and consumer confidence has been further weakened by public sector cuts, the rise in VAT, increasing unemployment, less expansionary consumer credit and the rising cost of living (including higher energy costs, petrol and housing prices). This has effectively reduced disposable income and retailers' margins are being squeezed further as the downturn persists.

- 3.5 Against this uncertain economic background, EBS forecast that annual retail spend growth rates will be lower than previous historic trends over the medium to longer term. As the table shows, EBS forecast average comparison goods retail spending growth of +3.0% per annum for the period 2016-2030, which is significantly lower than growth rates based on past trends of around +5.2% (the average annual growth for the period 1982-2012).

Retail Development

- 3.6 The retail development pipeline has also slowed dramatically during the economic downturn compared with the shopping centre "boom" experienced in the ten year period up to 2007. One of the key impacts has been to "weed out" some of the more expensive and unviable development schemes that were in the pipeline before the economic downturn.
- 3.7 The '2013 Shopping Centre Development Pipeline' Research Report by the British Council of Shopping Centres (BCSC) confirms that the quantum of completed new shopping centre floorspace in the UK is currently at its lowest level since the 1990s. Following the development of circa 260,000m² in 2009, 232,000m² in 2010 and 280,000m² in 2011, no new floorspace opened in 2012.
- 3.8 Notwithstanding this, the BCSC research also indicates that 2013 is showing the first significant signs of new activity, with circa 140,000m² of new floorspace opening (including Trinity Leeds). There are also a number of major schemes scheduled for 2014 and 2015, of which the most significant are Grand Central in Birmingham and Old Market in Hereford.
- 3.9 Given that it takes on average over ten years for a town centre scheme to be planned and developed, and can take even longer to deliver more complicated sites, then it follows that it will take a number of years for centres to benefit from the economic upturn and renewed investment and development confidence. Furthermore, the more challenging retail environment means that those (mainly non-prime) shopping locations that missed the previous pre-recession development cycle may face a long wait for new town centre development, or require a new approach if they are to secure new shopping centre development. Even then, the scale and type of new retail investment that will emerge in the post-recessionary period could be very different to the last "golden decade" of shopping centre development between 1997 and 2007.

Retailer Demand

- 3.10 Retailers have also had to adapt their business strategies and store formats to changes in customer requirements, planning legislation, the economic downturn and the growth in internet shopping. In general terms those retailers with strong brands and loyal customers, trading from the right stores in the right locations, and with a good online facility have managed to weather the economic storm.

- 3.11 In particular, the changes in the grocery sector over the last decade illustrate the dynamic changes in the retail sector. Some of the key trends include:
- The move by all the major national grocery retailers into the smaller convenience store sector in order to increase market share further. For example, Tesco now has over 1,500 'Express' format stores, Sainsbury's has developed its 'Local' format nationally and Waitrose are testing the 'Little Waitrose' format within the M25. Asda's purchase of Netto has also allowed it to operate from smaller convenience store formats.
 - The growth of European 'deep discount' food operators (such as Aldi and Lidl) has also continued during the economic downturn. In response to this competition, the established grocery retailers have expanded their own-range 'value' products and promoted significant 'price discount' campaigns.
 - The main grocery operators have increased the non-food sale areas of stores, including own-label clothing and electrical goods sales. In some of the larger stores operated by Tesco (i.e. the 'Extra' format) and Asda, a significant proportion of sales area (over 50%) is set aside for non-food retailing.
 - The 'race for more space' and new store openings over the last decade has also resulted in extensions to existing stores and/or new mezzanine space, and the growth of online shopping (see below).
- 3.12 In the non-food sector, those retailers that experienced significant growth up to 2007 have had to adapt to the very different market conditions. The retailers that have not been flexible enough to respond to changing consumer needs, or are being squeezed in the increasingly competitive 'middle ground' between high end and value retailing, have largely struggled to maintain market share over recent years. In some cases, this has resulted in a series of high profile 'casualties' and a number of key retailers have either disappeared from our high streets altogether (e.g. Woolworths, TJ Hughes, Jessops and Jane Norman), or have gone into administration and been forced to reduce their representation in centres across the UK (e.g. HMV, Blockbusters, etc.).
- 3.13 The 'bulky goods' retail warehouse sector has not been immune to the impact of the economic downturn. It has experienced a period of significant change and, more recently, instability. For example, during the late 1990s both B&Q ('Warehouse') and Homebase were rolling out very large out-of-centre retail warehouses (some exceeding 10,000m² gross) in an attempt to dominate market share. However, these same operators are now looking to close or scale down their under-performing stores in certain areas. Other 'bulky goods' operators have failed to remain viable in the economic climate (for example, Focus DIY).
- 3.14 Within town centres, some high street multiple operators are changing their formats and requirements. Some traditional high street retailers (e.g. Boots, Next, Mothercare, TK Maxx and Marks & Spencer) are also actively looking for space in

larger out-of-centre stores, either to accommodate new retail formats or to provide the larger floorplates they need to display their full range of products.

- 3.15 These changes in retail development and market demand are clearly impacting on the UK's town centres and high streets.
- 3.16 Research also shows that there is an increasing polarisation of development activity and investment interest in the larger regional and sub-regional centres (i.e. the 'top 100' centres). This is because they have larger and established catchment areas and represent less 'risky' investments in the current uncertain economic climate. These larger centres have also generally benefitted from recent new shopping centre development and investment over the last decade, and are therefore better placed than smaller and medium sized centres to accommodate retailers' requirements for modern larger format units. The continuation of these trends will impact on future operator requirements, with retailers looking to satisfy their demand for larger modern premises in prime shopping locations, with strong catchment areas and a good supply of appropriate retail space.

Internet Shopping

- 3.17 New forms of retailing have also emerged in recent years and are becoming established as significant alternatives to more traditional 'bricks and mortar' shopping facilities.
- 3.18 Internet and multi-channel shopping has increased its market share of retail sales in certain product categories due to the increased use of personal computers, mobile phones, tablets and faster Broadband access. Up to now, the impact of Internet shopping has been mainly concentrated on certain retail products and services (such as, for example, books, music and travel). In turn, this has resulted in a reduction in the number of retailers selling these types of products on the high street (the most recent 'casualties' being HMV and Blockbuster).
- 3.19 Although forecasters are still uncertain as to future growth, there does appear to be significant potential for increased market share of total retail expenditure. For example, the latest forecasts by Experian in *Retail Planner Briefing Note 11* (September 2013) indicate a growth in the market share of total non-store retail sales from 11.5% in 2012 to 20% by 2026.
- 3.20 However such forecasts need to be treated with caution as Experian forecast that approximately one-quarter of all SFT sales for comparison goods and some 70% for convenience goods occur through traditional ("bricks-and-mortar") retail space. In other words, purchases that are made online via computers, smart phones, tablets, etc., are still being sourced from existing stores on the high street or in out-of-centre locations. Although a number of the foodstore operators (e.g. Tesco and Sainsbury's) are looking to increase the number of distribution warehouses to directly source online food and non-food shopping, current research suggests that there will still be an

appetite by operators to increase ('physical') store floorspace to cater for rising internet sales. Furthermore, the forecast growth in 'click-and-collect' and 'showrooms' as a key driver of current and future internet growth will also mean that retailers will still be looking for a physical presence in easily accessible locations.

COMMERCIAL LEISURE TRENDS

- 3.21 Leisure uses make an increasingly important contribution to the vitality and viability of town centres and shopping centres, as they provide complementary uses that contribute to both the daytime, early evening and night-time economies.
- 3.22 Since the early 1990s the commercial leisure sector has experienced significant growth fuelled by buoyant market conditions, growing levels of disposable incomes and low unemployment. During the 1990s this growth mainly occurred in edge and out-of-centre leisure and retail parks, and was usually characterised by large multiplex cinemas and a range of other facilities (including tenpin bowling, bingo, nightclubs, health/fitness clubs, themed destination restaurants, pub/restaurants and budget hotels). However, the tightening of planning policy has resulted in leisure facilities and specifically cinemas being integrated more into town centre mixed use developments.
- 3.23 Although the commercial leisure sector has not been immune from the impact of the economic downturn, the latest development trends indicate a move towards leisure-led schemes with multiplex cinemas as important anchors in their own right, along with related catering uses. This is illustrated by Trinity Leeds where the amount of space allocated to leisure, eating and drinking increased over time to almost one-quarter of the centre's total floorspace. Other leisure-led schemes include the proposed extensions/refurbishments of Centrale in Croydon and Silverburn in Glasgow by Hammerson which comprise a new cinema and restaurants. The extension to The Walnuts in Orpington also includes a mix of cinema, restaurants and retail, as do the proposals for new leisure-led schemes in Ealing and Hounslow town centres.
- 3.24 Other sub-sectors of the commercial leisure industry have performed relatively well over the last decade and have expanded rapidly across different locations. For example, the private health and fitness market has benefited recently from the emergence of new 'budget' operators. This new breed of clubs appeal to a wider market with reduced monthly subscriptions. Examples include The Gym Group, Anytime Fitness and EasyGym, which offer "no-frills" venues and "pay-as-you-go" (often 24-hour) entry.
- 3.25 **Section 8** provides a more detailed commentary on current trends in the commercial leisure sector as part of the assessment of leisure needs for Nuneaton and Bedworth.

TOWN CENTRE FUTURES

- 3.26 Although there are positive signs that the UK is finally beginning to emerge from the economic downturn, it is clear that the commercial property sector post-recession will be very different to the "boom" years of the last decade.
- 3.27 Over the short to medium term at least the economy is forecast to experience a sustained period of lower growth in consumer spending, reduced bank lending, limited access to credit and cuts in public sector expenditure. This presents significant challenges for all those involved in the town centres development and investment.
- 3.28 The economic downturn and the growth of online shopping is also impacting on the vitality and viability of many of Britain's centres and high streets. This is placing pressures on rental growth and market demand in many centres, particularly secondary centres outside the 'top 100' shopping locations. This has been further compounded by rising vacancy levels and the loss of key retailers.
- 3.29 In our opinion, a far more uncertain future awaits the next "wave" of new retail investment and development. The evidence suggests that high quality schemes in the strongest prime shopping locations will continue to prosper. In contrast, the weaker secondary centres and shopping locations with a more limited offer, smaller catchments and negligible market demand will struggle to attract market interest and investment.
- 3.30 Notwithstanding the threat of online shopping, industry experts still predict that the demand from major retailers for new space will continue as it remains the primary mechanism for retailers to 'reach' their customers and grow their businesses. Over the short to medium term any increased demand for space from retailers will have to be met by the current retail stock (i.e. existing shopping centres, the high street and out-of-centre facilities), as there is limited new retail floorspace in the pipeline. With increased demand and the lack of supply over the short to medium term, research for the British Council of Shopping Centres (BCSC) predicts that this will effectively 'push up' rental levels for the larger modern desirable units until a significant amount of new development reaches completion. As a result, over the medium term, retailers will be competing for limited available space. Therefore those centres that are able to accommodate and deliver new developments over the next 5-10 years should be in a good position to attract operator interest. However, this will depend on the new retail floorspace being in the right location (i.e. preferably prime shopping locations) and having the right size, format and specification to meet the needs of modern retailers.
- 3.31 Research by the BCSC has also identified an increased emphasis on asset management, as owners and developers invest in the expansion or refurbishment of existing shopping centres to increase their investment value and turnover. In the current economic climate this investment in existing assets is less risky and financially onerous than new build projects. However, as the supply of suitable units "dry up" in prime locations, so retailers will also look at alternative options for delivering growth,

such as through new out-of-centre openings, increasing sales through the internet, and/or expanding internationally.

- 3.32 Finally, although the NPPF reinforces the longstanding policy objective of promoting development and investment in town centres first, it is likely that applications for new and extended shopping facilities in out-of-centre locations will continue in the future. Potentially the next phase of out-of-centre investment and development could be a further reinvention and masterplanning of existing out-of-centre locations as mixed use developments, comprising residential, office and commercial leisure uses in addition to the existing and extended retail offer. The potential opportunities to “*reinvent*” out-of-centre shopping locations will be greatest initially where they are located close to towns that do not have the physical capacity (i.e. sequential sites) to increase their retail offer.
- 3.33 In this context, it is clear that the ‘*top 100*’ prime centres and shopping locations in Britain should continue to flourish once the economy recovers. The greatest challenge will be how to revitalise the fortunes of struggling small and medium sized centres that do not have the critical mass of retail, leisure and other uses to compete for more limited investment and development.

4.0 NUNEATON TOWN CENTRE: HEALTH CHECK

- 4.1 Sections 4 and 5 provide health check updates for Nuneaton and Bedworth Town Centres respectively. Health checks are recognised as important 'tools' for appraising the overall vitality and viability of town centres and can help to inform both plan-making and decision-taking at the local level.
- 4.2 There are a number of Key Performance Indicators (KPIs) that are widely used (where the information exists) to help assess and monitor the overall health and performance of centres. Some of the KPIs include assessments of:
- the diversity of uses (e.g. retail, leisure and services offer);
 - retailer representation and demand;
 - commercial property indicators (such as Prime Zone A Rents);
 - changes in vacancy levels;
 - accessibility and parking provision; and
 - the quality of the town centre environment.
- 4.3 In this case the most up to date and available KPIs have been gathered (where possible) to help inform the assessment of the overall vitality and viability of Nuneaton and Bedworth Town Centres. The assessment included a desktop study of key research and datasets, including the latest Experian Goad Centre Category Reports (**Appendix 2**) and information provided by NBBC.
- 4.4 Site visits and audits of Nuneaton and Bedworth Town Centres were also conducted in February 2013, as well as the Borough's other main out-of-centre shopping and leisure facilities (namely Bermuda Park, Newtown Road Retail Park and Bond Street Retail Park).
- 4.5 The health check assessments undertaken as part of the *Town Centres Study* (2011) and *Convenience Goods Retail Study* (2011) also provide a 'benchmark' to help assess and identify any significant changes in the vitality and viability of Nuneaton and Bedworth town centres.

CONTEXT

- 4.6 The Local Plan (2006) identifies Nuneaton as the primary centre for the Borough, serving the population's retail and leisure needs and requirements. The centre also serves as the Borough's administrative centre, which generates an important working population that supports local businesses in the town centre. Nuneaton has good transport links with rail and road in particular. The M6, M42, M69, A5 and A444 all provide easy access into and out of the centre.

4.7 The town centre is anchored by two shopping centres, Ropewalk and Abbeygate. Their position at either end of the town centre creates a compact shopping area that is enhanced by a series of pedestrianised streets connecting the two centres.

- **Ropewalk Shopping Centre** was originally built in 2005 with the aim of strengthening Nuneaton’s role as the Borough’s primary shopping centre and to stem the flow of shoppers to nearby Coventry and other competing centres. The centre accommodates circa 19,045m² of retail floorspace spread across two floors. It includes a variety of major retailers and is anchored by BHS, Next and TK Maxx.
- **Abbey Gate Shopping Centre’s** offer comprises a mix of multiples and independent retailers. The centre’s 32 outlets all trade at ground floor level and its offer is mainly value-led, anchored by Argos. The majority of units are accessed within the shopping centre with a number of units accessed directly from Harefield Road.

Table 4.2 Ropewalk Shopping Centre Tenants

Category	Operators
Fashion Retailers	Topshop/TopMan, TK Maxx, H&M, Next, Monsoon, River Island, Accessorize, Ernest Jones, New Look, Republic/Schuh, Jonathan James, Ministry of Design, Blue Inc.
Other Comparison Retailers	Specsavers, Carphone Warehouse, Phones 4 U, The Works, The Body Shop, Perfume Shop, Canvas Hut, Virgin Media, Mobile Style.
Leisure	Costa Coffee, Subway, Muffin Break
Convenience	Network News
Retail Services	Supercuts

4.8 Retail and leisure activity in the rest of the town centre is focused on Abbey Street, Queen’s Road, Bridge Street and Harefield Road. These streets form part of the pedestrian zone, which create a safe shopping environment and promotes connections between the two shopping centres.

4.9 The town’s prime retail frontages are located along Abbey Street, Queen’s Road, Market Place, and the western section of Bridge Street which are populated by typical ‘high street’ retailers. Secondary streets such as Harefield Road, Stratford Streets, Newdegate Street and Abbey Gate provide a relatively strong retail frontage with more focus on independent retailers and retail services.

DIVERSITY OF USES

4.10 The assessment of the current retail, leisure and service provision in Nuneaton Town Centres has been informed by the latest Experian Goad *Town Centre Category Report* (**Appendix 2**). The Experian Goad datasets were also used to inform the town centre health checks carried out for the Council’s 2011 studies.

4.11 Tables 4.3 and 4.4 below show how the scale and composition of Nuneaton retail and service uses have changed since 2008.

Table 4.3 Diversity of Uses (Outlets)

Operator Type	September 2008		April 2012		% Change	2008	2012
	No. of Outlets	Outlets (%)	No. of Outlets	Outlets (%)		Index ⁹	
Comparison	173	44.13	160	40.3	-7.51	127	122
Convenience	28	7.14	26	6.55	-7.14	63	82
Retail Service	46	11.73	52	13.1	13.04	90	97
Leisure Services	68	17.35	69	17.38	1.47	81	79
Financial Services	44	11.22	41	10.33	-6.82	100	94
Vacant	33	8.42	49	12.34	48.48	82	101
Total	392	100	397	100	1.28	-	-

Table 4.4 Diversity of Uses (Floorspace)

Operator Type	September 2008		April 2012		% Change	2008	2012
	m ²	Area (%)	m ²	Area (%)		Index	
Comparison	56,986	50.92	49,257	43.69	-5.7%	109	110
Convenience	19,695	17.6	22,965	20.37	-8.1%	63	44
Retail Service	4,654	4.16	5,277	4.68	+5.3%	89	127
Leisure Services	15,487	13.84	15,282	13.55	+0.5%	97	102
Financial Services	7,005	6.26	6,401	5.68	-1.9%	87	111
Vacant	8,092	7.23	13,564	12.03	+22.9%	n/a	118
Total	111,919	100	112,746	100	-0.4%		

Source: Centre Category Reports, Experian (2008 and 2012)

4.12 The tables shows that Nuneaton has some 397 retail and service outlets (including vacant units recorded at the time of the audits) trading from a total ground-floor 'footprint' floorspace¹⁰ of 112,746m² (1,204,700ft²). This is equivalent to an average size of units of 284m². This represents an increase in the number of outlets since 2008 (+5 units) and total floorspace (827m²).

4.13 In summary the tables show that the town's total comparison and convenience offer (outlets and floorspace), and occupied financial services accommodation, has fallen

⁹ The Index illustrates the difference between a percentage figure for the centre and the UK average. An index of 100, for example, represents that provision is the same as for the circa 2,000+ centres and shopping locations audited by Experian Goad. An index of less than 100 indicates a below average provision for the centre, and an index of over 100 represents above average provision. The index is an effective 'gap' analysis tool to help identify specific categories that are under- or over-represented in a centre.

¹⁰ The floorspace figures are derived from the Experian Goad Plans and show 'footprint' floorspace. They should not therefore be read as a definitive report of floorspace, but do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

between 2008 and 2012. In contrast there has been an increase in the main service categories over the same period; and also an increase in vacant units and floorspace.

4.14 These key changes are explained in more detail below.

Comparison Provision

4.15 There are currently estimated to be some 160 shops in Nuneaton selling comparison goods, trading from a total 'footprint' floorspace of 49,257m². Although this represents a small fall in provision since 2008, Nuneaton still has an above average provision of comparison goods retailing. For example, the proportion of comparison retail outlets in Nuneaton was 40.3% in 2012 compared to the UK average of 33%.

4.16 The town's comparison offer is anchored by Debenhams department store on Bridge Street and BHS in Ropewalk Shopping Centre. The town also benefits from two key variety stores including Wilkinsons on Church Street and TK Maxx in Ropewalk Shopping Centre. Fashion retailing is represented by a selection of popular UK multipliers including Arcadia brands (Burton, Evans, Dorothy Perkins and Topshop), River Island, New Look Monsoon, H&M, Clarks, Phase Eight and dual representation from H&M.

4.17 Since 2008, the town centre has attracted a number of new retailers due to the redevelopment of Ropewalk Shopping Centre. However, a major loss to the town centre was the closure of Marks and Spencer on Market Street in 2010 after 78 years of trading. We understand that the company's decision to close the Nuneaton branch was in response to falling sales. The unit on Market Street is now occupied by discount variety store, Poundland.

4.18 Table 4.5 shows that Nuneaton has an above average provision of fashion clothing and footwear retailing. For example, the total 'footprint' floorspace of 12,467m² represents 11% of total floorspace in the town centre, which is above the national average of 9.8%.

Table 4.5 Fashion (Clothing & Footwear) Retailing

Operator Type	Outlets			Floorspace		
	No. Outlets	% of Total	UK Average (%)	Sq m	% of Total	UK Average (%)
Children's & Infants Wear	0	0	0.46	0	0	0.35
Clothing General	14	3.53	2.25	5,741	5.09	3.60
Footwear	4	1.01	1.18	437	0.39	0.95
Ladies & Men's Clothing	4	1.01	1.17	1,765	1.57	1.59
Ladies Wear & Accessories	9	2.27	2.83	2,871	2.55	2.59
Men's Wear & Accessories	9	2.27	0.88	1,654	1.47	0.70
Total	40	10.09	8.77	12,467	11.07	9.78

Source: Goad Category Report, Experian (2012)

4.19 Notwithstanding this, the number of fashion retail outlets has fallen from 98 to 86 between 2008 and 2012. This is partly explained by the impact of the economic downturn on retailing and the High Street. For example, since 2008 a number of key retailers have “disappeared” from the UK’s high streets, including JJB Sport, TJ Hughes and Woolworths (all formerly located in Ropewalk Shopping Centre). More recently Jessops was forced into administration and its store on Abbey Street has closed; although HMV still continues to trade from its outlet at Ropewalk Shopping Centre.

4.20 Nuneaton has a relatively good provision and choice of comparison retailers across all sub-categories. There are also a number of operators absent from Nuneaton which trade in centres of a comparable size, including:

- | | | |
|--------------|----------------|-------------------|
| • Animal | • Hallmark | • Snappy Snaps |
| • Barratts | • Hobbs | • Sole Trader |
| • Benetton | • Hush Puppies | • Stead & Simpson |
| • Books etc | • JD Sports | • Sunglass Hut |
| • Card Fair | • Paperchase | • Timberland |
| • Coast | • Peacocks | • USC |
| • Etam | • Primark | • Whistles |
| • Footlocker | • Scholl | |

Convenience Provision

4.21 There are some 26 food and convenience goods outlets in Nuneaton (as defined by Experian Goad in 2012) trading from a total estimated (Goad ‘footprint’) floorspace of 22,965m² gross. This represents an increase in convenience provision since 2008. Convenience retail floorspace accounts for 20.4% of centre floorspace, which is significantly above the national average of 14.4%. This is mainly attributed to the good level of supermarket provision both within and on the edge of the town centre¹¹. Supermarket floorspace accounts for 17.4% of centre floorspace which is twice the national average (8.9%). The town centre is anchored by Sainsbury’s on Vicarage Street with Co-op on Abbey Street, Iceland on Queen Street, and Heron Foods on Abbey Street completing supermarket representation. The choice of foodstores is also strengthened by Asda on Newtown Road and Aldi on Queen’s Road.

4.22 The town’s convenience retail offer is also supported by a good choice of smaller multiples (e.g. Greggs and Thorntons) and independent retailers. The mix of multiple and independent food and convenience stores help to underpin Nuneaton’s role as the primary food shopping destination for the Borough. This role should be maintained and enhanced as the town’s food shopping is vital in supporting other retailers and town centre uses through linked shopping trips and footfall. To achieve this, the Council should continue to direct new convenience retail to town centres and avoid development that will divert expenditure and footfall from the town centre.

¹¹ Please note that the Experian Goad report does not include the Asda superstore on Newtown Road and Aldi on Queen’s Road.

Markets

- 4.23 Nuneaton benefits from a traditional market that operates twice weekly on Wednesdays and Saturdays at Market Place and Coventry Street. The market offers a range of goods sourced from across the Midlands and past winner of *Market of the Year* (2009) and *Best Market Attraction* (2010) by the *National Association of British Market Authorities*. It is recognised as an important asset to the town centre and draws a high footfall from local residents and tourists. In addition street vendors operate daily within the pedestrian precinct and include florists and food outlets.

Retail & Financial Services

- 4.24 The Experian data shows that Nuneaton has a relatively good provision of shops/businesses in the following categories:

- dry cleaners/ laundrettes (2 outlets)
- health and beauty operators (26);
- opticians (7);
- post offices (1);
- photo processing (2);
- travel agents (7)
- vehicle repairs and services (4)
- building societies (3)
- property services/estate agents (9);
- financial services (5); and
- retail banks (16).

- 4.25 In contrast there is limited or no provision of the following retail and financial services; repairs, alteration and restoring, photo studios, printing and copying, and TV/video rental. This is not unexpected, however, as these types of retail and financial services have experienced the most significant impact from the growth of online shopping.

Leisure Services

- 4.26 There are currently some 69 leisure services¹² recorded in Nuneaton Town Centre. This represents 17.4% of total provision and is below the national average figure of 21.9%. As Table 4.6 shows, there are 20 restaurants and cafes (Use Class A3). Although this is below the national average, the number of restaurants and cafes has increased from 16 recorded in 2008.

¹² Leisure services as defined by Experian Goad include cafes, bars, restaurants and take-away outlets; cinemas; casinos and betting offices; clubs and nightclubs; hotels and guest houses; sports and leisure facilities; bingo halls; and amusement arcades.

Table 4.6 Eating and Drinking

Categories	OUTLETS			FLOORSPACE		
	No. Outlets	% Total	UK Average (%)	Sq m	% Total	UK Average (%)
Eating Offer:						
Cafes	16	4.03	4.06	1,579	1.4	2.11
Restaurants	4	1.01	4.37	1,198	1.06	3.78
Sub-total	20	5.04	8.43	2,778	2.46	5.89
Drinking Offer:						
Bars & Wine Bars	3	0.76	1.41	910	0.81	1.77
Clubs	6	1.51	0.68	3,679	3.26	1.18
Dance & Nightclubs	5	1.26	0.25	1,412	1.25	0.53
Public Houses	7	1.76	2.84	2,313	2.05	3.77
Sub-Total	21	5.29	5.18	8,315	7.37	7.25
Other:						
Fast Food/Take Away	18	4.53	5.38	2,267	2.01	2.57
Sub-Total	18	4.53	5.38	2,267	2.01	2.57
TOTAL	59	14.86	18.99	13,359	11.84	15.71

Source: Centre Category Report, Experian (June 2012)

- 4.27 The majority of the town's eating and drinking offer comprises independent traders. The main multiples are limited to Caffe Nero (Queen Road), McDonalds (Queen's Road), Muffin Break, Subway and Costa Coffee, (all within Ropewalk Shopping Centre). There is a distinct lack of branded family-friendly restaurants which typically occupy centres of Nuneaton's size and role as a principle centre (such as, for example, Pizza Express, Nandos, etc.).
- 4.28 There are 21 drinking 'venues' in the centre, and these are predominantly independent operators. This represents a small increase from the number recorded by Experian in 2008 (19 venues).
- 4.29 Other leisure activities in the town centre include health and fitness clubs (including Gym Heaven, TLC and Ladypace) and three bingo/amusement venues (including Grand Bingo Club and Sun Spot). Other leisure services located outside the town centre survey boundary defined by Experian include The Fitness Centre at Corporation Street. The town centre does not have a cinema. The nearest cinema is at Bermuda Park (Odeon) and other leisure facilities in this out-of-centre location include a bowling alley (Lakeside), health club (Nuffield Health & Fitness) and drive-through KFC.
- 4.30 It is widely recognised that cinemas and other leisure services can help to strengthen the attraction and viability of town centres, both during the daytime and evenings. They help to generate increased footfall and expenditure, whilst also encouraging customers and visitors to spend more time and money in the town centre as a whole.

Based on its current offer, Nuneaton would benefit from further investment in its leisure provision to improve the range of leisure options for all ages. A more detailed analysis of leisure provision is provided in **Section 8**.

Other Uses & Attractions

4.31 According to Experian Goad there is one hotel/guest house located in the town centre which is below the national average for town centre provision. It is not certain what venue is being referred to in the Experian Goad survey as there is no record of visitor accommodation in the town centre following a recent town centre inspection. The nearest known hotel is located beyond the town centre boundary at Manor Court Road (Abbey Grange Hotel). The absence of visitor accommodation in the town centre suggests that visitors are mainly undertaking day trips or choosing accommodation in other centres such as Coventry. However, it is acknowledged that the development brief for the Vicarage Street site includes the provision of a hotel. This would create an important asset to the town centre in terms of developing Nuneaton's tourist and business visitor market.

4.32 The town centre also has a diverse range of other activities, including:

- Town Hall
- bus interchange
- advice centres
- places of worship
- library and information centre
- private and public sector offices
- dental surgery
- art gallery
- community centre and halls
- police station
- Small number of dwellings

4.33 The number of other attractions, facilities and services are limited in the town centre but nonetheless contribute to the overall vitality and viability of the town centre, generating trips, footfall and expenditure.

RETAILER REPRESENTATION AND DEMAND

4.34 According to Experian Goad, some 171 outlets in Nuneaton are occupied by national multiple operators (Use Classes A1-A5). As Table 4.7 shows, multiples account for 43.1% of totals outlets in the town centre and 66.4% of all floorspace.

4.35 Compared with the 2008 Experian data, there has been a decline in the number of outlets occupied by national multiple operators by 30 outlets (-14.3%); from 201 to 171. This is mainly explained by the fact that a number of high street retailers have gone into administration since 2008 (such as, for example, Woolworths, JJB Sports, Jessops, TJ Hughes, etc.), or have vacated the centre (e.g. Marks and Spencer).

Table 4.7 National Multiple Representation (2012)

Categories	Outlets			Floorspace		
	No. Outlets	% Total	UK Average (%)	Sq m	% Total	UK Average (%)
Comparison	90	52.63	43.44	40,840	57.22	48.18
Convenience	16	9.36	10.95	22,074	9.63	22.3
Retail Service	20	11.7	9.99	2,908	6.2	5.01
Leisure Services	21	12.28	19.52	4,571	16.39	15.52
Financial Services	24	14.04	16.09	4,441	10.55	8.99
Total	171	100	100	74,833	100	100

Source: Centre Category Report, Experian (2012)

- 4.36 Retailer demand for representation in any centre is another important indicator of a centre's overall health and viability. **Appendix 3** provides a broad barometer of the type and range of current requirements from retailers and commercial leisure operators for Nuneaton based on the CoStar *Town FOCUS* database. Whilst this dataset is not comprehensive and does not cover all retailer requirements, it does at least provide a consistent approach for assessing changes in market demand between centres and the relative market strength of centres¹³.
- 4.37 Nuneaton currently has registered requirements from seven retail and leisure operators, which is equivalent to a total retail floorspace requirement of 873m². Some of the main retailers and leisure operators with an interest in the town, either for new or larger premises, include Phase Eight, The Fragrance Shop, HPJ Jewellers, Simply Eat, Dominos Pizza, Oakham Finance Ltd and an unnamed funeral care provider.
- 4.38 Although there has been a decline in recorded requirements from 23 in 2009, this reflects the trend for all the UK's town centres due to the impact of the economic downturn on retailer activity and demand for space. In Nuneaton's case, while the number of requirements has fallen, the overall quality of operators seeking representation in the town centre is relatively good and their addition to the town centre would help to contribute to strengthening Nuneaton's overall offer. Furthermore, a number of retailers that had requirements for Nuneaton in 2009 have since opened outlets in the town centre (including Poundland and Caffè Nero). Overall, the centre remains relatively low in the Focus ranking of centres by requirements; it was ranked 146th in January 2009.

¹³ For instance, a number of retailers (including Tesco and the John Lewis Partnership) are not registered on the CoStar dataset as they consider that it will undermine their negotiating position if they are identified as seeking space in centres. Furthermore, retailers who do not have requirements for a particular centre or shopping location at the current time may change their position if new retail floorspace is provided in the right locations.

RETAIL RENTAL VALUES & YIELDS

- 4.39 Prime Zone A rental levels in Nuneaton are based on evidence set out in the CoStar *Town Centre* Reports and information provided by DTZ based on recent transactions at key locations in the town centre.
- 4.40 Before the economic downturn Prime Zone A rents in the town centre reached £120 per ft² following RBS's acquisition of 11-17 Queens Road. More recent evidence indicates Prime Zone As of between £50 per ft² (Caffe Nero acquired a new ten year lease at 2 Queens Street, Nuneaton) and £80 per ft² (Barclays Bank at 7 Market Place). Discussions with local retail agents have also indicated that rental values in Ropewalk Shopping Centre have fallen over recent years to circa £70 per sq ft. Notwithstanding this, rents are likely to rise as the economy and market demand improves.
- 4.41 Retail yields in Nuneaton town centre have been informed by the following recent retail investment transactions:
- **37 Queens Road** was sold for £575,000 during the second quarter of 2012. The 4,970 ft² unit was let to B Wise for £62,000 per annum, reflecting a net initial yield of 10.91%.
 - **1-2 Church Road** was sold for £2.13m during the second quarter of 2011. The 23,514 ft² retail unit was let to Wilkinsons for £152,000 per annum at a net initial yield of 6.75%.
- 4.42 Other recent investment opportunities have advertised yields ranging from 6% (HSBC, 3A Queens Road) to 10% (Game, 7-9 Queens Rd). Centres that compare to the investment yields achieved in Nuneaton town centre include high street locations in Newcastle-under-Lyme, Long Eaton (Nottingham), Rugeley and Market Harborough. Recent transactions for these centres show they are achieving a net initial yield of between 6.7% and 8.9%.

VACANCY LEVELS

- 4.43 As the table below shows, Experian identified that there were some 49 vacant units in the town centre in April 2012. This was equivalent to a vacancy level of 12.3%, which was only slightly above the national average for all centres recorded by Experian at the time of 12.2%.
- 4.44 Table 4.8 shows that the number of vacant outlets has increased from 33 in 2008. Similarly, the quantum of vacant floorspace has also increased to 13,564m² gross. This is equivalent to 12% of total town centre floorspace, which was also above the UK average of 10.1% in 2012.

Table 4.8 Vacant accommodation

Year	Outlets			Floorspace		
	No. of Outlets	% of Total Outlets	UK Average (%)	Sq m	% of Total Sq m	UK Average (%)
2008	33	8.42	10.33	8,092	7.23	8.46
2012	49	12.34	12.22	13,564	12.03	10.16
Change	16	3.92	1.89	5,472	4.8	1.7

Source: Centre Category Report, Experian (2008 and 2012)

- 4.45 This increase is mainly explained by the continued impact of the economic downturn, which has resulted in a number of major multiple retailers and independents going out of business. The loss of JJB Sports and others from the town centre has also resulted in a number of larger vacant units coming on to the market in the last 12 months. Notwithstanding this, larger vacant units in prime locations are more likely to attract new tenants looking for larger format stores. For example, the former Marks and Spencer unit on Market Place was leased to Poundland within a short period of the unit being vacant.
- 4.46 A street survey undertaken by SP in February 2013 identified a concentration of vacant units along Abbey Street (9) which is considerably high given this is a popular shopping street. Smaller clusters of vacant units were also recorded in prime shopping areas such as Bridge Street (3) and Market Place (3). There were also four vacant units in Ropewalk Shopping Centre at the time of our audit, although this included the large vacant unit formerly occupied by JJB Sports and three smaller units that are proving more difficult to let.
- 4.47 In general, vacancies remain high for Nuneaton and there is concern that when retail leases expire, many retailers will not renew contracts which could result in more vacant units, or the occupation of units by lower quality retailers or charity shops. Continued investment in the town centre is needed to attract more key retailers which in turn will stimulate interest from other retail and leisure multiples. The development at Vicarage Street has the potential to achieve this.

ACCESSIBILITY & PARKING

- 4.48 Nuneaton's good links to the transport network largely explain its growth as an important and successful administrative centre for the Borough. It lies on the strategic M6, M69 and A5 routes. The town centre has good accessibility by all modes of travel including public transport and is served by a railway station, which is within walking distance of the town centre. The centre has good rail connections with frequent links to Leicester, Hinckley, Birmingham, Bedworth, and Coventry as well as both London and Milton Keynes.

- 4.49 The centre's pedestrianised zone brings obvious benefits to pedestrians by promoting safe connections between the two shopping centres and the streets between. This creates a more attractive environment for town centre users. The pedestrianised zone operates daily between 10am to 4pm and parking is prohibited in the zone at all times. An automatic bollard system is in place to prevent traffic entering the pedestrian zone.
- 4.50 Nuneaton also benefits from a good provision of both multi-storey and at grade car parking facilities strategically located across the centre. There are 1,877 car parking spaces in the town centre, including a good provision of disabled car parking facilities. Table 4.9 below sets out the town's main car parks and the changes in total annual usage between 2007 and 2012.

Table 4.9 Changes in annual car parking levels

Location	Spaces
Abbey Street	424
Victoria Street (1)	38
Victoria Street (2)	68
Rope Walk (Multi)	517
Harefield Road (Multi)	605
Newdegate Street	77
Justice Walk	119
Church Street	90
Town Hall (weekends only)	42
TOTAL	1,980

Source: Nuneaton and Bedworth Borough Council

- 4.51 Dedicated *Blue Badge* parking is also available at car parks and badge holders are permitted to park in the pedestrian zone before 10am and 4pm.
- 4.52 There are numerous bus routes that pass through the centre, including the main bus facility on Harefield Road, that provide regular services to surrounding towns and villages in the catchment. Regular train services are available at Nuneaton Rail Station which is located within walking distance from the town centre. The station is located adjacent to the out-of-centre Asda store and Station Road Retail Park.
- 4.53 Our visual inspections of the town centre also identified a good provision for cyclists (i.e. cycle paths, parking etc.).

ENVIRONMENTAL QUALITY

- 4.54 Whilst it is difficult to be objective as to the environmental quality of any centre, Nuneaton is characterised by a good mix of attractive historic and modern buildings that make a positive contribution to the streetscape.

- 4.55 The overall appearance and quality of the main shopping streets and public realm is good. The recent refurbishment of the Ropewalk Shopping Centre has also helped to enhance the attractiveness of the centre to shoppers and prospective tenants.
- 4.56 Our audit of the town centre identified a good provision of street furniture, litter bins, seating area and signage. Although there is evidence that measures are in place to maintain the main shopping precincts (illustrated by hanging flower baskets along the pedestrian zones of Market Place, Queen's Road, Stratford Street, Bridge Street, etc.), the stakeholder consultation did identify that more was needed.
- 4.57 Overall the town centre has a good environment, but the rise in vacancies and signs of lack of investment in certain areas and streets (particularly along Abbey Street) is a cause for concern and should be carefully monitored.

NEW DEVELOPMENT AND INVESTMENT

- 4.58 The opening of Ropewalk Shopping Centre in 2005 represents the last major investment in the town centre. Although it has attracted more shops and shoppers to the town centre, the downturn in the economy is impacting on the town centre.
- 4.59 In this context, Nuneaton and Bedworth Council are promoting a site at **Vicarage Street** for a mixed-use development. The Council's objective is to enhance the centre's vibrancy and economic viability through the development of the site. The development of the 4.4ha site is expected to include office and ancillary uses, small-scale retail provision, a new library, and a hotel.

OUT-OF-CENTRE RETAIL PROVISION

- 4.60 The majority of non-town centre retail and leisure provision in the Borough is located in Nuneaton. A number of retail warehouse developments are located to the north of the town centre including Newtown Road Retail Park, Bond Street (4,366m²) and Station Retail Park (3,530m²). There are also some large standalone retail warehouse units located close to the above retail parks, including Halfords at Newtown Road and Pets at Home close to Bond Street.
- 4.61 Bermuda Park is also a significant out-of-centre commercial area located between Nuneaton and Bedworth. The scheme comprises a mix of leisure, retail warehousing (e.g. Bathstore, Topps Tiles, and Screwfix), business and industrial uses. As stated previously, the leisure facilities include a multiplex cinema (Odeon), a bowling alley (Lakeside), a gym (Nuffield Health), a pub (The Bermuda Park) and a number of restaurants (Frankie & Benny's, KFC, McDonald's).
- 4.62 Table 4.10 provides a summary of key out-of-centre retail warehouse developments in Nuneaton.

Table 4.10 Out-of-centre retail warehouse provision

Retail Park	Operators
Bond Street	Curry's, Carpetright.
Station Park Retail Park	Dunelm Mills, Blockbuster, Poundstretcher
Bond Street	Homebase; Blockbuster; Dream; Pets at Home
Weddington Road	Focus DIY, Wickes, Russell Francis, Midlands Golf Superstore
Newtown Road	Halfords
Bermuda Park	Bathstore, Topps Tiles, Screwfix.

- 4.63 There is limited out-of-centre superstore provision in the Borough. Both Sainsbury's and Asda are defined as being out-of-centre in retail planning terms (i.e. more than 300m from the primary shopping area), although both stores are close to the town centre and do generate important linked trips. The Borough's out-of-centre discount food offer comprises Lidl at Queens Road and Aldi at Kingswood Road.

STAKEHOLDER CONSULTATION FEEDBACK

- 4.64 A consultation workshop was held on the morning of the 16th May 2013 with key stakeholders in the town centre, including members of the business community, local councillors, representatives from the Council and Warwickshire County Council, and other interest groups. The workshop was held at the Town Hall with the purpose of identifying key issues for Nuneaton town centre as well as identifying opportunities for improving the town centre. **Appendix 4** provides detail on those who attended the workshop (Table A) and the main themes and issues discussed (Table B) during the 90 minute session.
- 4.65 A summary of the key themes that emerged from the workshops include:
- **Shopping** – the town centre's shopping is limited and there is a lack of quality retailers, while there is increasing competition from centres outside the Borough (e.g. Coventry).
 - **Businesses** – high business rates and rents are forcing smaller businesses to close, which is contributing to increasing vacant units in the centre.
 - **Environment** – there is a general need to improve the maintenance and management of the town centre and riverside, and improve links between Riversley Park and the river.
 - **Culture and Heritage** – a need was identified to promote the town's local heritage and associations with film and the arts, with the potential to create a arts/cinema/theatre venue.
 - **Development Sites** – there is an opportunity to promote vacant/development sites in the town centre to stimulate investment in the centre.

- **Connectivity** – traffic congestion is considered an issue in the centre during peak hours and improvements could be made to pedestrian wayfinding, (particularly to and from the railway station). There is also an opportunity to improve cycle paths and connections.

SUMMARY

4.66 Overall Nuneaton is a relatively vital and viable town centre, despite the impact of the recession on retail investment and market demand across the UK. The health check and consultation exercises have identified that the centre has a number of key strengths and opportunities:

- A relatively attractive and safe shopping environment, particularly within the prime pedestrian zone.
- An award winning street market that attracts regular shoppers and tourists.
- Abundant car parking provision located in close proximity to the pedestrian zone.
- An increase in town centre usage since 2008/09.
- Good multiple retailer representation, balanced with a good choice of independent and specialist retailers.
- Potential to build tourism based on the street market.
- Current opportunities for new retail development in the town centre.

4.67 Some potential weaknesses and areas for concern identified include:

- A decrease in convenience and comparison provision (outlets and overall floorspace) in the town centre since 2008.
- Increasing vacant units in the town centre, with the potential threat of further vacancies linked with retail leases coming to an end and operators withdrawing from the town centre.
- A 'gap' in the town's retail and leisure offer compared with competing town centres and shopping locations.
- Limited choice for families and visitors (e.g. cinema, theatre, etc.) and the lack of a quality restaurant offer.
- A fall in retailer requirements since 2008, principally due to the impact of the economic downturn on market demand and investment activity.
- The increased strength and attraction of other major centres in the region, principally Coventry and Birmingham.

5.0 BEDWORTH TOWN CENTRE: HEALTH CHECK

- 5.1 This section sets out the updated health check for Bedworth Town Centre.

CONTEXT

- 5.2 Bedworth is situated to the south the Borough, seven kilometres south of Nuneaton and six kilometres to the north-east of Coventry. The town centre is smaller than Nuneaton and mainly serves the more frequent day-to-day retail and service needs of its local catchment population. Bedworth's proximity to Coventry means it is likely to attract a large commuter population. In terms of retail hierarchy, Bedworth is identified as an '*Other Town Centre*' in the Nuneaton and Bedworth Local Plan (2007).
- 5.3 Bedworth's retail and service offer is concentrated on the pedestrianised All Saints Square, which accommodates a number of large national multiples (including Superdrug, Boots and New Look), as well as Congreve Walk. Secondary shopping frontages exist along High Street, Newtown Road, King Street and Leicester Street. These streets are characterised by a general absence of national multiples and a greater representation of commercial uses interspersed with residential. The covered market is located just off Congreve Walk.
- 5.4 The town's retail floorspace and offer is largely anchored by the new Tesco Extra store located to the north of the town centre (Mill Street), which opened in December 2011 and replaced the smaller Tesco store in the same site. The new store has a total gross internal area of 9,960m² and a net trading area of 5,539m² at first floor level, above the car parking. The original Tesco had an estimated sales area of 3,532m² net. The store is served by some 508 car parking spaces (including 23 disabled spaces, 19 parent and toddler spaces and 40 cycle spaces), and there is also a 6-pump petrol filling station (PFS). Other buildings towards the western part of the site (including the White Swan Public House) were also demolished as part of the overall development and they have been replaced by two new units of circa 410m² gross, one of which is occupied by Costa Coffee. As part of the Tesco development improvements have also been made to the public realm and main pedestrian entrance to the store from Sleaths Yard, along with a new pedestrian crossing to All Saints Square to the south.
- 5.5 Other national multiple operators in the town centre include New Look, Boots, Clintons, Superdrug, Co-op Pharmacy, Betfred, Iceland, Halifax, Barclays, Natwest, Nationwide and Lloyd's Banking Group.
- 5.6 The Council operate a pedestrian zone along King Street which extends to All Saints Square and part of High Street. Vehicle access restricted within the pedestrian zone during the hours of 10am and 4pm.

DIVERSITY OF USES

- 5.7 To help inform the broad assessment of the changes in the diversity of retail and services uses in the town centre (as measured by outlets and floorspace provision), we have compared and contrasted the findings of the latest Experian Goad *Town Centre Category Report* with the 2007 Experian Goad Report (see Tables 5.1 and 5.2).

Table 5.1 Diversity of Uses (Outlets)

Category	2007		2011		% Change	2008	2012
	No.	% of Total	No.	% of Total		Index	
Comparison	38	27.14	36	29.27	-5.26	79	89
Convenience	21	15	13	10.57	-38.10	63	132
Retail Service	21	15	19	15.45	-9.52	115	114
Leisure Services	24	17.14	20	16.26	-16.67	80	74
Financial Services	18	12.86	17	13.82	-5.56	115	126
Vacancies	18	12.86	18	14.63	0.00	121	120
TOTAL:	140	100	123	100	-12.14	-	-

Table 5.2 Diversity of Uses (Floorspace)

Operator Type	2007		2011		% Change	2008	2012
	Area (m ²)	% of Total	Area (m ²)	% of Total		Index	
Comparison	6,234	22.1	6,782	31.21	8.8%	58	85
Convenience	8,222	29.15	3,335	15.35	-59.4%	63	107
Retail Service	1,979	7.02	2,527	11.63	27.7%	101	161
Leisure Services	4,812	17.06	4,404	20.27	-8.5%	75	89
Financial Services	2,676	9.49	2,583	11.89	-3.5%	109	143
Vacancies	4,283	15.18	2,100	9.66	-51.0%	171	95
TOTAL:	28,205	100	21,730	100.0	-23.0%	-	-

Source: Centre Category Reports, Experian (2007 and 2011)

- 5.8 As the tables show, Experian recorded that there were some 123 retail and service units (Class A1-A5) in Bedworth town centre in 2011 (including vacant outlets), trading from a total ground-floor footprint floorspace of 21,730m² (233,900 ft²).
- 5.9 Although the number of outlets has fallen by 17 since 2007 and floorspace has declined by 6,475m² (69,700 ft²), this is misleading as Experian's 2007 Goad Plan and Centre Reports included the original Tesco store within the town centre, whereas the 2011 plans and report place the larger new Tesco Extra replacement store outside of the defined town centre boundary.

- 5.10 The following provides a more detailed assessment of the changes in the provision of the different types of retail and service provision in the town centre.

Comparison Provision

- 5.11 In terms of its total outlets, Bedworth has a below average comparison goods provision and total non-food floorspace has increased slightly since 2007, to 6,782m². This may be due to the occupation of larger format stores by non-food retailers. Notwithstanding this, current provision of 31.2% is slightly below the national average for all centres covered by Experian of 36.6%.
- 5.12 Fashion retailing in the town centre is limited to four outlets. This is not unusual for a town of Bedworth's size and role within the centre hierarchy. The results of the household survey confirm that local residents undertake their main comparison shopping in Nuneaton Town Centre, or travel outside the Borough area to larger shopping centres, principally Coventry and Birmingham. It is clear that Bedworth's main strength in retail terms is its food and convenience retail offer, anchored by the new Tesco Extra store.
- 5.13 It should be noted that the centre has a high number of charity shops. Experian Goad recorded nine charity shop outlets in the town centre, which equates to 7.3% of total outlets. This is almost three times the national average (2.4%). SP's street survey carried out in February 2013 identified a slight reduction in the number of charity shops (to eight), although this figure is still relatively high compared with national averages. Whilst charity shops have their place in a town centre and can contribute to the overall offer, too many outlets can result in negative perceptions of centres and this should be carefully monitored by the local planning authority.

Convenience Provision

- 5.14 Bedworth benefits from a strong food and convenience retail, anchored by the new replacement Tesco Extra superstore at Leicester Street. The store has a total estimated sales area of 5,539m² net and a significant proportion of this space is set aside for a wide range of comparison goods retailing.
- 5.15 As stated above, analysis of convenience floorspace based on the latest Experian Centre Report (2011) should be interpreted with caution as it does not include the redeveloped Tesco in the defined town centre boundary. Other multipliers operating in the town centre include Iceland and Aldi, both located on Mill Street to the north of the town centre.
- 5.16 The town's multiple offer is also complemented by smaller independent retailers. Notwithstanding this, there has been a decline in the number of independent CTNs, butchers and bakers, grocers and/or delicatessens since 2007.
- 5.17 The town centre's food and convenience offer also benefits from a permanent covered market situated on Mill Street which comprises a mix of market units and stalls. A traditional retail market operates twice weekly on a Tuesday (7am to 3pm) and Friday

(7am to 4pm). On other days car boot sales and traders occupy the market. The market is closed on Sundays.

Retail & Financial Services

5.18 The Experian data shows that Bedworth has a modest provision of retail and financial services which is typical for a centre of its size. There is representation in the following categories:

- dry cleaners/laundrettes (1 outlet);
- health and beauty operators (5);
- opticians (3);
- post offices (1);
- travel agents (4)
- vehicle repairs and services (2)
- building societies (2)
- property services/estate agents (4);
- financial services (3); and
- retail banks (6).

5.19 As with Nuneaton, there is under-representation across a number of categories, such as printing, copying and photo processing, which is explained by a shift towards obtaining these services online.

Commercial Leisure and Other Uses

5.20 Commercial leisure provision in Bedworth town centre is below the national average. For example, Experian identified that there are only three restaurants and cafes in the town, including the Costa Coffee which opened as part of the Tesco redevelopment.

5.21 Bedworth also has a range of other activities that are commensurate to a town of its size and function, including:

- theatre
- dwellings
- doctor's surgeries
- veterinary surgery
- civic hall
- place of worship
- library / tourist information centre
- police station

5.22 The Civic Hall and Theatre are key attractions in the town centre, and help to generate visits, footfall and linked trips to other shops and facilities. However, it is clear from the stakeholder workshop that the limited places to eat and drink in the town at present is not encouraging longer "dwell times".

RETAILER REPRESENTATION AND DEMAND

5.23 According to the latest Experian Town Centre Category Report there are 48 national multiple operators (Classes A1-A5) in Bedworth town centre trading from 11,734m² (126,300 sq ft). However, this excludes the Tesco store on Leicester Street, which would increase the overall level of multiple floorspace significantly. Notwithstanding this, there would appear to be some potential for Bedworth to strengthen its multiple offer following the opening of Tesco.

5.24 In terms of requirements from retailers and service businesses for representation in Bedworth, the latest CoStar data (see **Appendix 3**) shows that there are only three

operators with a recorded interest. This compares with four requirements recorded in April 2007. Of these, Poundland has a requirement for a store of between 418 - 929m² in a primary shopping location and Heron Frozen Foods has a requirement for a unit of up to 465m² in a primary or secondary retail location. Although the number of requirements may appear low, this is typical for a centre of Bedworth's size.

RETAIL RENTAL VALUES & YIELDS

- 5.25 As for Nuneaton, Prime Zone A rental levels and yields for Bedworth have been sourced from CoStar and other commercial databases, as well as property agents. However, there is more limited evidence for Bedworth compared with Nuneaton due to fewer commercial property transactions taking place.
- 5.26 In 2013 CoStar recorded six retail units to-let with rental values ranging from £10 per m² (20 High Street) to £25 per m² (9 Leicester Street). The average rent quoted or achieved was equivalent to £15 per m². This value is considerably less than rental values recorded in Nuneaton (up to £80 per ft²), which reflects Bedworth's relative size, role and function in the retail hierarchy.
- 5.27 Due to a lack of retail investment transactions there is no available data on retail yields for the town centre. However, it is expected that Bedworth will underperform Nuneaton.

VACANCY LEVELS

- 5.28 According to Experian's Town Centre Category Report some 18 units were vacant in October 2011, equivalent to 2,100m² of vacant space (see table below). This represented a vacancy level of 14.6% in 2011, which was above the UK average of 12.2% at that time. Notwithstanding this, vacancy level for total floorspace of 9.7% is below the national average of 10.2%.

Table 5.3 Vacant accommodation

Year	Outlets			Floorspace		
	No. of Outlets	% of Total Outlets	UK Average (%)	Sq m	% of Total Sq m	UK Average (%)
2007	18	12.86	10.62	4,283	15.18	8.87
2012	18	14.63	12.22	2,100	9.66	10.16
Change	0	1.77	1.6	-2,183	-5.52	1.29

Source: Centre Category Report, Experian (2007 and 2011)

- 5.29 Comparisons with the 2007 Experian data indicate no change in the number of vacant units, but a significant reduction in the total quantum of vacant floorspace. This is a positive sign and is most likely explained by the redevelopment of vacant units on Mill Street, which formed part of Tesco redevelopment.

- 5.30 SP's own audit of the centre in February 2013 did highlight a cluster of vacant units along Congreve Walk, which links All Saints Square to the rear of the market. The units along Congreve Walk mostly comprise small floorsplates and there could be potential to reconfigure these units into larger units to attract new retailers or other commercial uses.

ACCESSIBILITY & PARKING

- 5.31 Although transport links in Bedworth are not as strong as neighbouring Nuneaton it is in close proximity to major cities including Birmingham, Coventry and Leicester. It also has easy access to the M6, direct rail links to Coventry and a strong bus network.
- 5.32 The town also has a good choice and number of car parking spaces. As the table below shows, there are 690 spaces in the town's four main car parks. There is also a good provision of on-street parking facilities.

Table 5.4 Car parking facilities

Location	Type	Capacity
Tesco	Short Stay	508
Spitalfields (1)	Long Stay	99
Spitalfields (2)	Long Stay	37
Park Road	Long Stay	46
Total		690

Source: Nuneaton and Bedworth Borough Council

- 5.33 Bedworth rail station is located to the east of the town centre, off King Street, and provides regular connections to Nuneaton and Coventry. There is potential to improve way-finding to and from the station to the town centre.
- 5.34 There is no up-to-date pedestrian footfall information available for Bedworth Town Centre. However, based on our visits and audits of the town centre it is apparent that the highest pedestrian footfall is between the new Tesco Extra store and All Saints Square. Aldi, Home Bargains and the covered market to the west of the town centre also generate pedestrian footfall along Congreve Walk. This highlights the importance of the Tesco Extra, Aldi and Home Bargains stores to the town centre's overall vitality and viability; both as 'anchor' stores and as important generators of significant linked shopping trips and expenditure to other shops, services and facilities.
- 5.35 Pedestrian footfall is lower along King Street to the east and High Street to the south. However the Civic Hall and library on the High Street, along with other facilities, do generate footfall. Consultation with local stakeholders highlighted the need for improved connectivity between the Tesco store and the town centre; particularly at the junction of Mill Street and Church Way. This was confirmed on inspection which showed limited opportunity for pedestrian crossing.

ENVIRONMENTAL QUALITY

- 5.36 Bedworth has a good mix of attractive historic and modern buildings that make a positive contribution to the streetscape. Notable buildings in the town include the Tudor-style Nicholas Chamberlaine Almshouses on All Saint's Square and the more modern Bedworth Civic Hall and attached arts centre.
- 5.37 Secondary shopping streets and areas would benefit from shop front improvements particularly where they serve as a gateway to the town centre (e.g. Leicester Street).
- 5.38 Overall, the pedestrianised area is free of litter and graffiti and there is a good provision of street furniture, litter bins, seating area and signage. The pedestrianised area also creates a safe and attractive environment for shoppers and other town centre users. The centre also benefits from a pleasant landscaped garden area adjacent to the Almshouses, although the area is not open to the public.

STAKEHOLDER CONSULTATION FEEDBACK

- 5.39 A consultation workshop was held on the evening of the 16th May 2013 with key stakeholders in the town centre. This included members of the business community, local councillors, representatives from the Council and Warwickshire County Council, and other interest groups. The workshop was held at the Civic Centre with the purpose of identifying key issues for Bedworth town centre as well as identifying strengths and opportunities for improving the town centre. **Appendix 4** provides detail on those who attended the workshop (Table A) and the main themes and issues discussed (Table C). A summary of the key themes that emerged from the workshops include:

- **Shopping** – it was generally felt that the redevelopment of Tesco has had a positive impact on the town centre, while the lack of out-of-centre retailing in the Borough generally has helped to retain shoppers and expenditure in the town centre.
- **Town Centre Activity** – the town centre is busiest on a Saturday morning, although activity falls away in the afternoon. On Sundays and weekday evenings the town centre was described as being 'dead'.
- **Vacant Units** – increasing vacant units in the town centre is a particular concern.
- **Environment** – the general shopping environment and public realm would benefit from new investment.
- **Culture and Heritage** – the Civic Hall is an important cultural attraction and the town also benefits from many local heritage attractions, although these need to be promoted and marketed more effectively.
- **Leisure** – Bermuda Park is viewed as an important leisure attraction for the residents of Bedworth, but there was an identified potential to promote more

family leisure uses and events in the town centre, particularly during the 'quieter' periods.

SUMMARY

- 5.40 The health check and consultation exercises identified a number of strengths with regard to Bedworth Town Centre's overall vitality and viability. For example:
- The town centre has benefited from new investment over recent years. The redeveloped Tesco acts as an important anchor to the town's overall retail offer and has also improved frontages along Mill Street and Leicester Street.
 - The centre has experienced falling vacancy levels and floorspace since 2008, despite the impact of the economic downturn on business confidence and market demand;
 - The covered market meets the day-to-day needs of local residents for a range of goods; and
 - The town centre benefits from a pleasant car-free shopping environment, particularly along King Street and All Saints Square.
- 5.41 Some potential weaknesses and areas for concern include:
- Poor pedestrian connectivity between Tesco and the rest of the town centre.
 - An undeveloped early evening and night-time economy, despite the attraction of the popular Civic Centre. This may reflect the limited choice of complementary commercial leisure uses, such as quality restaurants and pubs, which would help to draw visitors to the centre in the evening and encourage them to stay for longer.
 - There are 'pockets' within the town centre where there are a high number of vacant units (i.e. Congreve Walk).
 - Aside from the main multiples, the choice and range of retailing in the town centre is limited, and there is an over representation of charity shops.
- 5.42 Although Bedworth town centre will never compete with Nuneaton for major comparison and fashion shopping, it does have an important role and function meeting the day-to-day needs of its local catchment population and other visitors/tourists to the town. Therefore its future performance and prospects are inextricably linked to its convenience, service and leisure offer. Fundamentally, at this level in the shopping hierarchy, the maintenance and enhancement of the food shopping function is of paramount importance as this will draw people to the centre on a day-to-day basis and help to generate linked trips and 'spin-off' expenditure to the benefit of the town's other shops, businesses and facilities.

6.0 STUDY AREA AND SHOPPING PATTERNS

6.1 This section describes the study (catchment) area assumed for the purpose of the retail assessment, and the shopping patterns and market shares identified by the most recent household telephone interview survey (HTIS) conducted for the Council in August 2010.

THE STUDY (CATCHMENT) AREA

6.2 The starting point for any retail assessment is to define a realistic and appropriate study ('catchment') area. For strategic assessments the study area needs to be drawn sufficiently widely to 'capture' the wider catchment of the Borough's main centres (in this case Nuneaton and Bedworth Town Centres), as well as the more localised catchments of other smaller centres, foodstores and standalone shopping facilities. The study area is then normally sub-divided into zones (usually based on postcode sector geography) to help facilitate a finer level of analysis.

6.3 The study area used for the purpose of this retail study update is the same as was defined for the *2011 Convenience Goods Capacity Update*. This area was broadly based on the Council's previous retail studies; although it is not directly comparable due to changes in postcode sector geography¹⁴.

6.4 The study area was sub-divided into 19 geographic zones based on postcode sectors to allow for a finer level of analysis of shopping patterns for convenience and comparison goods purchases. The plan showing the extent of the defined study area and zones is set out in **Appendix 5**. For the purpose of this quantitative assessment the 19 zones have been further grouped into the following three broad geographic areas:

- **'Nuneaton Zone'** – this comprises Zones 1-7 to the north of the Borough area and broadly reflects the primary catchment and influence of Nuneaton Town Centre within the study area based on the market share analysis.
- **'Bedworth Zone'** – this comprises Zones 8-10 and Zone 13.
- **'Outer Zones'** - Zones 11-12 and 14-19 are located outside the Borough area and extend as far as Hinckley and Atherstone to the north.

6.5 The Nuneaton and Bedworth Zones also broadly reflect the extent of the Borough area.

6.6 The study area and zones provided the framework for a telephone interview survey of some 1,000 households conducted by NEMS in August 2010 to help inform the *2011 Convenience Goods Retail Study*. This survey identified broad shopping patterns and preferences for both convenience and comparison goods purchases within the study

¹⁴ This is due to changes in postcode geography and the inclusion of additional postcode sectors for the purpose of the 2011 Study. Also Zone 1 was sub-divided into five zones to enable a finer level of analysis. The use of postcode sectors is generally recommended as a means of coding survey responses, as population/expenditure data is widely available and produced based on postcode geography.

area/zones. It also provided a 'baseline' picture of the market shares and 'current' turnovers of all existing centres and stores in the study area at 2011, as well as the broad 'retention' levels within the zones and wider study area.

- 6.7 As described in **Section 1**, this study update is also informed by the results of the 2010 survey. Since the survey was conducted there has been limited new retail floorspace developed in the study area, apart from the new replacement Tesco Extra store in Bedworth which opened in December 2012. In our view the survey does still provide a robust baseline position for assessing shopping patterns and market shares across the study area and zones. Notwithstanding this it has been necessary to review and revise both food and non-food shopping patterns and market shares at 2013 (the 'base year') to take account of the potential effects of the new replacement Tesco store, as well as the closure of the smaller Netto store in Nuneaton. These revisions are explained in more detail below.

BASELINE MARKET SHARE ANALYSIS

- 6.8 The 2010 household telephone interview survey results provide the baseline picture of shopping patterns and market shares for different types of convenience and comparison goods shopping within the defined study area and zones¹⁵. For quantitative assessments these market shares are applied to the available retail (convenience and comparison) expenditure in the study area/zones to help identify the current ('indicative') turnovers of existing centres and stores drawn from within the study area/zones.
- 6.9 The headline market shares and trends for both convenience and comparison goods shopping identified by the 2010 survey are briefly described below.

Convenience Goods

- 6.10 Convenience goods¹⁶ retailing is defined as comprising everyday essential items, including food, drinks, newspapers/magazines and confectionery (also see **Glossary of Terms**).
- 6.11 For convenience goods, the 2010 survey comprised standard questions on 'main' ("trolley-based") and 'top-up' ("basket-based") food shopping. The results of the two types of food expenditure were then merged through the application of a widely accepted weighting, which reflects the estimated proportion of expenditure accounted for by each type of food shopping based on the survey results and market trends. In this case a weighting has been applied to the total available convenience goods

¹⁵ Please note that the survey results were re-weighted by NEMS to filter out negative responses (such as by people who did not remember where they shopped for a particular type of good). Special Forms of Trading (i.e. purchases over the Internet, mail order shopping and market stalls) were also filtered out. This is because it is common practice in retail assessments to deduct SFT from the average expenditure per capita figures at the outset (see Section 5).

¹⁶ For the purpose of retail assessments it is generally assumed that 'convenience goods' and 'food' shopping have the same meaning.

expenditure in each study zone of 75% for 'main' food shopping and 25% for 'top-up' food shopping. This weighting produces a composite pattern of convenience goods spending, expressed as a market share for each centre and store by study area/zone.

6.12 The market share tabulations for 'main' and 'top-up' convenience goods shopping across the 19 (postcode sector) zones are set out in **Appendix 6** (Tables 1-2). The overall (combined) market shares are detailed in Table 3 (**Appendix 6**).

6.13 This 2010 survey provides the 'baseline' shopping patterns and market shares for the economic capacity assessment. Some of the key trends identified by the survey are as follows:

- Across the Borough area (i.e. equivalent to Zones 1-10 and Zone 13) all the main food and convenience stores in the town, district, local and neighbourhood centres are achieving a good retention level for all food shopping of 80.2%.
- The retention level is higher in the Nuneaton Zone (86.2%) than for the Bedworth Zone (67.1%). This reflects the stronger foodstore provision in Nuneaton, where Asda (37%) and Sainsbury's (20.5%) are achieving the highest market shares.
- Tesco was achieving the highest market share in the Bedworth Zone of 42.9% in 2010.
- However it should be noted that this market share was recorded before the opening of the new replacement Tesco store in late 2011 (i.e. after the 2010 survey was conducted). This larger new replacement store will have strengthened Tesco's market share of food shopping in the Bedworth Zone and will have helped Bedworth to 'claw back' some of the 'leakage' (32.9%) to stores outside the area; principally the competing Tesco at Arena Retail Park in Coventry, which was estimated to be achieving a 17.5% market share in the Bedworth Zone in 2010.

6.14 We assess the likely impact of the new replacement Tesco store on shopping patterns and market shares in more detail in **Section 7** as part of the retail capacity assessment.

Comparison Goods

6.15 Comparison goods¹⁷ are generally defined as items not obtained on as frequent a basis as convenience goods, and include clothing, footwear, DIY, household and recreational goods (also see **Glossary of Terms**).

6.16 The household survey questionnaire asked respondents where they normally shop for ten different types of comparison goods purchases, including 'clothing and footwear' (*question 15*), 'large domestic appliances' (e.g. fridges, washing machines, etc.) (*question 20*), and 'games, toys, hobbies, sports, camping and musical instruments'

¹⁷ For the purpose of our assessment 'comparison goods' and 'non-food' shopping have the same meaning.

(question 22). These categories were defined based on the detailed expenditure profile reports derived from Experian Business Strategies (EBS). Finally, Question 24 of the household survey necessarily grouped together shopping preferences for all other comparison goods¹⁸. This is because it was not feasible within the time and budgetary constraints of a household survey to cover all the detailed expenditure categories classified by EBS.

6.17 The market share tabulations for the different types of comparison goods expenditure are set out in **Appendix 7** (Tables 2-10). The table below summarises the market shares and retention levels for some of the different categories of non-food shopping and expenditure identified by the survey.

Table 6.11 Nuneaton and Bedworth 'Borough' - Market Share Analysis (%)

	Clothing & Footwear	Furniture, Carpets, etc.	Audio-visual, Photography, Computer, etc.	DIY, Hardware, etc	Large Domestic Appliances	Games, Toys, Hobbies, etc	Pets & Pet Products
Nuneaton Town Centre:	60.2	58.6	59.3	36.1	62.5	62.9	61.0
Out of Centre:	0	1.5	0	21.3	0.7	0	0
Bedworth Town Centre:	2.1	6.7	6.1	13.5	8.4	4.2	15.9
All Other Centres:	0	1.5	0.2	0.4	0.7	0	2.8
RETENTION LEVEL:	62.3	68.2	65.5	71.3	72.4	67.1	79.8
Outside Borough ('leakage')	37.7	31.8	34.5	28.7	27.6	32.9	20.2
TOTAL MARKET SHARE:	100	100	100	100	100	100	100

Source: 2010 (August) household telephone interview survey

Notes: The Borough Area is assumed to be broadly equivalent to Zones 1-10 and 13 of the defined study area.

6.18 The table shows that Nuneaton Town Centre commands the highest market shares for comparison retailing within the Borough area. Not surprisingly, Nuneaton's market share is stronger within its own (Nuneaton) zone, rising to over 80% for certain non-food categories (e.g. Large Domestic Appliances and Pets).

6.19 Table 1 (**Appendix 7**) identifies the total (combined) market share for comparison goods retailing within the study area and 19 zones, weighted by the different categories of comparison goods expenditure.

6.20 Some of the key headline results and trends identified by Table 1 are as follows:

- The Borough's main centres and stores are achieving a total market share (or 'retention level') of all comparison goods shopping trips within the wider study area (i.e. Zones 1-19) of 50.2%.

¹⁸ This includes the following categories - books; jewellery; watches; glassware; recreational and luxury goods; etc..

- Within the Borough area (i.e. equivalent to Zones 1-10 and Zone 13) the Borough's main centres and stores are achieving a good retention level of 71%.
- The main 'leakage' (29%) is to all Coventry's shops and stores (21%), Leicester (3.4%), Birmingham (1.6%) and Solihull (1.3%).
- As for food shopping, the retention level is higher in the Nuneaton Zone (78.3%) than for the Bedworth Zone (54.8%).
- Nuneaton Town Centre dominates non-food shopping within the Borough area as a whole. It is achieving a 60.7% market share across the Borough, 74.5% in the Nuneaton Zone and 30.1% in the Bedworth Zone.
- In comparison, Bedworth Town Centre's total Borough-wide market share is significantly lower at 7.4%. As expected it is achieving a higher market share in the Bedworth Zone of 23%, but has a limited draw and share from within the Nuneaton Zone (0.4%). Nevertheless, the opening of new replacement Tesco store in 2011 has increased the scale and choice of non-food retailing in Bedworth, and we would expect it to have increased the town's retention level within the Bedworth Zone.

6.21 As for food shopping, we have assessed the likely implications of the Tesco replacement store on Bedworth's comparison goods market shares in more detail in Section 7 as part of the retail capacity assessment.

SUMMARY

- 6.22 In summary, the survey evidence shows that the Borough's main centres and stores are retaining a relatively high proportion of convenience goods shopping trips and expenditure within the Borough zones.
- 6.23 While Nuneaton Town Centre is the prime destination for a range of comparison goods shopping, there would appear to be potential to increase its retention levels for certain categories of comparison goods expenditure through the potential 'claw back' of expenditure 'leaking' out of the Borough to competing centres in the region, particularly Coventry, Leicester and Hinckney.
- 6.24 Although Bedworth town centre's market share of food and convenience goods purchase is limited at Borough level, it does achieve a strong market share within its core zones. The town centre's market penetration will have increased following the redevelopment of Tesco.

7.0 ECONOMIC CAPACITY ASSESSMENT

- 7.1 This section sets out the assessment of the quantitative need (capacity) for new retail (comparison and convenience goods) floorspace in the Borough area over the development plan period, from 2011 up to 2028 (and beyond this to 2031). This assessment updates the previous retail capacity studies prepared for the Council.

THE CREAT^E CAPACITY MODEL

- 7.2 The quantitative capacity for new retail floorspace can arise as a result of forecast expenditure growth (either through population growth or increases in spending), or by an identified “imbalance” between the turnover of existing facilities and the current level of expenditure in an area. The CREAT^E model has been specifically developed and refined by Strategic Perspectives over a number of years to assess the capacity for, and impact of new retail (convenience and comparison goods) floorspace. The (Excel-based) model draws on the advice set out in the NPPF and best practice. It is based on a transparent ‘step-by-step’ approach in which all the key assumptions and forecasts underpinning the model can be easily tested and interrogated. The model has been subject to detailed scrutiny and examination at numerous Local Plan and Appeal Inquiries.
- 7.3 However, it should be noted at the outset of this assessment that capacity forecasts carried out over a long period of time are inherently less certain and should be treated with caution. This is principally due to the impact of economic, demographic and market trends on the key assumptions and forecasts. As a result we advise the Council that greater weight should be placed on the short term forecasts, over a 3-5 year period. Furthermore, the capacity forecasts are only intended to provide a broad indication of the potential need for new retail floorspace to help inform plan-making and potential future site allocations. They should not, in our judgement, be treated as maximum or minimum “thresholds” (or “targets”) that have to necessarily be met over the lifetime of the development plan due to the uncertainty of forecasting over a 10-15 year period.

EVIDENCE, DATA SOURCES & ‘SENSITIVITY’ TESTING

- 7.4 The approach, assumptions and forecasts used to inform the retail capacity assessment are based on a wide-ranging evidence, research and best practice. For example, the average retail (convenience and comparison goods) **expenditure per capita** levels for the study area/zones have been derived from the latest *Retail Planner Reports* prepared by Experian (please note all expenditure and turnover figures are expressed in 2011 prices).
- 7.5 We have also referred to the latest *Retail Planner Briefing Note 11* (October 2013) published by Experian Business Strategies (EBS) to inform our forecasts of

expenditure growth over the study period (up to 2031) and an appropriate allowance for the growth in the market share of 'non-store' retail sales (otherwise referred to as **Special Forms of Trading**)¹⁹.

- 7.6 For the purpose of this retail study update we have been instructed by the Council to 'test' the sensitivity of the capacity forecasts based on the different population projections published by Experian and Oxford Economics. Although both research bodies use ONS projections as the starting point for their demographic models and projections, Oxford Economics differ significantly from Experian and ONS in terms of their treatment of migration. In simple terms, the Oxford Economics demographic model is "*economically driven*" and takes into account the fact that migration trends are generally closely linked to demand from the labour market (i.e. migrants will go to areas where labour is available). They therefore assume fewer net in-migrants per year compared to the ONS projections. As a result the Oxford Economics population projections at a regional and local authority level are lower in comparison to the ONS and Experian projections.
- 7.7 In this context, SP's retail capacity assessments for both comparison and convenience goods is based on the following two population growth scenarios:
- a '**baseline**' scenario, which draws on the population projections derived from Experian; and
 - a '**lower growth**' scenario based on the projections derived from Oxford Economics.
- 7.8 The key steps in the retail capacity assessment, and the main assumptions and forecasts underpinning the **CREAT^e** Model are described in more detail below.

'BASELINE' CAPACITY SCENARIO

- 7.9 The 'baseline' capacity tabulations for convenience goods and comparison goods are set out in **Appendix 8** and in **Appendix 9** respectively. The capacity forecasts are based on Experian's population growth projections for the study area and 19 zones. We describe the key steps and assumptions underpinning the retail capacity assessment and tabulations in more detail below.

Population Projections

- 7.10 The 2011 population estimates for the study area/zones have been derived from Experian's demographic reports. As Table 1 for both convenience goods (**Appendix 8**) and comparison goods (**Appendix 9**) shows, there were some 208,760 people living in the study area in 2011. Of these, some 130,155 (62%) were residing in the zones

¹⁹ SFT is made up of purchases that generally occur outside of shops such as, for example, via mail order, vending machines, telephone sales, market stalls and the Internet.

that broadly make up the Borough area (i.e. Zones 1-10 and Zone 13). Within the Borough area itself, more than twice as many people live in the Nuneaton Zone (89,433) than in the Bedworth Zone (40,722).

- 7.11 Over the (development plan) forecast period, up to 2028, the total study area population is projected to increase to 243,131 according to Experian's figures. This represents a +12.5% (+26,495 people) growth in the total population between 2013 and 2028.
- 7.12 Within the defined Borough area the population is projected to increase from 131,930 in 2013 to 147,172 by 2028 (+11.6%).
- 7.13 The Nuneaton Zone's (i.e. Zones 1-7) population is projected to increase from 90,788 in 2013, to 102,481 by 2028 (+12.9%). In the Bedworth Zone (Zones 8-10 and Zone 13) the population is projected to increase from 41,142 in 2013 to 44,691 by 2028; which represents a +8.6% growth.

Average Expenditure Levels and Special Forms of Trading

- 7.14 Table 2 for both convenience goods (**Appendix 8**) and comparison goods (**Appendix 9**) sets out the expenditure per capita levels derived from Experian for the 19 study zones in 2011 (2011 prices).
- 7.15 An allowance has been made for the market share of non-store retail sales (Special Forms of Trading) at 2011 and the forecast growth up to 2031 based on Experian's latest *Retail Planner Briefing Note* (September 2013). As described in Section 3, Experian's research shows that total non-store retail sales accounted for 11.5% of all UK retail sales in 2012, increasing to 12.3% by 2013. By 2030 Experian forecast that SFT will account for 20.5% of total sales. Of this total, non-store comparison goods sales are forecast to increase from 14% in 2012 to 21.2% by 2030, and convenience goods non-store sales are forecast to rise from 7% to 18.5%.
- 7.16 Notwithstanding Experian's research, there is some debate between economic forecasters as to the actual growth in SFT and Internet shopping, and the likely impact on the capacity/demand for new retail (physical) floorspace in the future. It is Experian's judgement, for example, that the overall impact on traditional store-based shopping will be "tempered" by the fact that a proportion of online sales are sourced from regular stores rather than dedicated warehouses. Furthermore, Experian state that store-based expenditure per capita is still forecast to increase, even if this growth is "outpaced" by non-store retailing. The assumption therefore is that Internet shopping and traditional store-based shopping could be mutually beneficial. This is illustrated by the growth of 'click and collect' and 'multi-channel' retailing, where shopping via the Internet is driving the demand for traditional ('physical') outlets and showrooms.

- 7.17 In this context we have used Experian's 'adjusted' SFT forecasts which assume that some 25% of SFT comparison goods sales and 70% of convenience goods sales will continue to be sourced from traditional ('physical') retail space. On this basis we have made an allowance for the growth in SFT for comparison goods from 10.8% to 16% between 2013 and 2030, and from 2.5% to 5.6% for convenience goods over the same period.
- 7.18 Notwithstanding this, it is apparent that if the growth in Internet shopping is stronger than forecast by Experian, and a smaller proportion of online retail sales are sourced from existing shops, then there will be a reduction in the total retail expenditure capacity available to support existing and new retail floorspace. We therefore advise the Council to monitor the research and update the forecast growth rates when necessary.

Total Available Expenditure

- 7.19 Total available retail expenditure in the study area and zones is derived by multiplying the population and average expenditure per capita levels together at the base year and over the forecast period. The headline results show:
- For **convenience goods** (Table 3, **Appendix 8**) total available expenditure in the study area (Zones 1-19) is forecast to increase from £380m in 2013 to £461.6m by 2028. This represents a total growth of +£81.7m (+21%).
 - For **comparison goods** (Table 3, **Appendix 9**) total available expenditure is forecast to increase from £539.6m in 2013 to £871.2m by 2028. This represents a significant growth of +£331.5m (+61%) over the forecast period.
- 7.20 The forecasts show that the growth in comparison goods expenditure will significantly outstrip convenience goods expenditure growth. All things being equal, this means that there will be greater capacity potential for new comparison goods floorspace over the forecast period than for convenience goods; assuming no changes in the key forecasts (i.e. expenditure, population and special forms of trading).

Turnover/Trading Performance

- 7.21 The next key stage in the capacity assessment involves establishing the 'baseline' turnover (trading) performance of the Borough's main centres and stores. This is fundamental to the assessment of what, if any "residual" capacity is likely to arise over the forecast period.

Convenience Goods Turnover

- 7.22 The 'current' convenience goods turnover/trading performance of all existing centres and stores in the study area at the base year has been informed by the market share analysis derived from the household survey (see **Section 6**).

- 7.23 The available convenience goods expenditure (£ million) in the study area/zones at 2011 is allocated to the all stores and floorspace according to their 'baseline' market shares for 'main' and 'top-up' food shopping (see Tables 4-5, **Appendix 8**).
- 7.24 Table 6 (**Appendix 8**) sets out the total expenditure/trade allocated to all stores and floorspace in the study area, and the resultant market shares (%). The table shows that Asda in Nuneaton is achieving the highest trade draw from within the study area of £68.6m in 2011 (2011 prices), followed by Sainsbury's in Nuneaton (£35.5m) and Tesco in Bedworth (£33.8m). It should be noted that this represents the performance of the original Tesco in Bedworth, prior to its demolition and replacement by a new Tesco Extra store in December 2011.
- 7.25 It is standard practice for retail assessments to forecast the growth in 'current' turnover levels by holding the baseline market share levels constant over the forecast period. However, in this case it has been necessary to review the market shares at 2013 due to the opening of the new replacement Tesco Extra in Bedworth and the closure of a small Netto supermarket in Nuneaton (off Regent Street) since the 2010 survey was conducted.
- 7.26 The new replacement Tesco Extra store has a total gross internal area of 9,960m². The permitted sales area of the new store of 5,539m² net is some 2,007m² greater than the original Tesco store (3,532m² net). Although there is no available breakdown of the convenience and comparison sales splits, based on our store audits we estimate that a minimum of 55% of the new store's sales area has been set aside for convenience goods retailing.
- 7.27 Based on the increase in the scale and quality of the new Tesco store's retail offer, and the increase in car parking, we have necessarily adjusted the 'baseline' market shares. Table 8 (**Appendix 8**) sets out the revised market share analysis at 2013.
- 7.28 In accordance with the advice set out in the NPPG, and on the basis that "*like affects like*", we estimate that the main impact of the replacement Tesco Extra store will be to 'claw back' a proportion of the main food shopping trips and expenditure currently leaking to Coventry and to the competing Tesco Extra at Arena Retail Park. On this basis we forecast that the replacement Tesco Bedworth store will increase its market share in the study area as a whole to 10.4% by 2013. Within the Bedworth Zone we estimate an increase in market share from 42.9% to 51.6%. This results in an increase in the 'retention' level within the Bedworth Zone from 67.1% pre-Tesco to 75.8% post-Tesco. This is a reasonable assumption in our judgement.
- 7.29 In terms of the Netto store, it was achieving a more modest 0.5% market share within the study area according to the 2010 household survey results. Following its closure we have re-allocated its market share and trade draw to the other existing stores in Nuneaton Town Centre.
- 7.30 Having established the revised market shares at 2013 (Table 9), we have then projected forward the turnovers of all the Borough's main centres and stores to 2031

based on a constant market share approach (see Tables 10-14). This is a standard approach widely used for strategic retail assessments.

- 7.31 Finally, the market share analysis only takes account of expenditure/trade drawn from within the defined study area. It does not make any allowance for shopping trips and expenditure that could potentially be drawn from outside the study area. In this case we have assumed that the Borough's foodstores will not draw any additional trips or convenience goods expenditure from outside the study area. This is based on the wide geographic area covered by the study area; the strong competition from foodstores both within and outside the Borough; and the fact that households generally shop at their most convenient and accessible foodstores, and do not generally travel long distances to satisfy their food shopping needs.
- 7.32 On this basis Table 15 (**Appendix 8**) summarises the forecast changes in the total convenience goods turnovers of the Borough's main centres and stores between 2011 and 2031. This takes account of our adjustments to market shares at 2013.

Comparison Goods Turnover Performance

- 7.33 For comparison goods **Table 4 (Appendix 9)** allocates all the available comparison goods expenditure (£ million) in the study area and zones at 2011 to the Borough's existing retail floorspace based on the (survey-derived) market shares (%).
- 7.34 The table shows that Nuneaton Town Centre draws some £219m of comparison goods expenditure/trade from the study area in 2011 (2011 prices). This is significantly higher than for Bedworth Town Centre (£25m) and all other centres and stores in the Borough, and reflects Nuneaton's role as the Borough's dominant shopping location.
- 7.35 As for convenience goods retailing, we have adjusted the market shares at 2013 to take account of the potential impact of the additional new comparison goods floorspace provided as part of the replacement Tesco Extra store in Bedworth. In this case we estimate that the new Tesco store will increase Bedworth Town Centre's total market share within the study area from 4.9% to 6.0% between 2011 and 2013. This increase is explained by the 'claw back' of expenditure 'leaking' out of the Bedworth Zone to similar competing superstores outside the Borough; principally the Tesco Extra at Arena Retail Park in Coventry.
- 7.36 Having established the revised market shares at 2013 we have then projected forward the turnovers for all the Borough's main centres and stores to 2031 based on a constant market share approach.
- 7.37 The forecast changes in the (survey-derived) turnovers of the Borough's main centres and stores are set out in Tables 6-10 of **Appendix 9**. The total comparison goods turnovers are summarised in Table 11. Based on the location and scale of competition from other major centres and shopping facilities outside the Borough, we have assumed that there will be no "inflow" of expenditure/trade to Nuneaton or Bedworth Town Centres from outside the defined study area.

Retail Commitments

- 7.38 It is our understanding from the Council that there were no major retail schemes with planning permission and/or under construction at the time of preparing this study.
- 7.39 We note however that permission was granted in May 2013 for a small “*neighbourhood*” convenience store at the junction of Beaumont Road and Croft Road, some 400m to the west of Queens Road District Centre. The scheme will involve the demolition of the existing Cock and Bear Public House and the provision of a small store with an estimated net sales area of 234.5m². The applicant has identified that they are marketing the store to a national multiple retailer (e.g. for a Tesco Express and Sainsbury’s Local format) and on this basis we estimate that the store will achieve a convenience goods turnover of circa £2.8m when it opens.
- 7.40 As described above, the replacement Tesco Extra store in Bedworth was granted permission in November 2010 and opened in December 2012. We have not treated this replacement store as a “*commitment*” in this case, as we have modelled the impact of the additional net floorspace on the ‘baseline’ market shares.

Convenience Goods - ‘Baseline’ Capacity Forecasts

- 7.41 It has initially been assumed for the purpose of the retail capacity assessment that the Borough’s food/convenience retail market is in ‘*equilibrium*’ at 2013. In other words no allowance is made at the outset for the fact that stores could potentially be under or overtrading at the base year, based on comparisons between the actual (survey-derived) turnovers and ‘benchmark’ turnover levels²⁰.
- 7.42 Assuming ‘*equilibrium*’ at the base year, the forecast residual expenditure capacity within the study area up to 2031 is derived from the differences between:
- the forecast growth in turnover levels, based on applying the constant (survey-derived) market shares to the total growth in available expenditure; and
 - an allowance for the growth in ‘productivity’ (‘efficiency’) in existing and new retail floorspace in accordance with policy and good practice.
- 7.43 For convenience goods we have assumed an average ‘productivity’ growth rate of circa +0.3% per annum for the period 2011 to 2031 based on Experian’s latest Briefing Note. However, it should be noted that individual centres, stores and shopping facilities will be capable of achieving higher and/or lower annual ‘productivity’ growth depending on a range of trading factors (including the size, quality and type of retail floorspace).

²⁰ If, for example, stores are identified as under-trading at the base year then it can normally be assumed that there is no ‘pent-up’ capacity for new retail floorspace at the outset of the retail assessment. Alternatively, if it can be demonstrated that existing stores are significantly over-trading, based on quantitative and qualitative measures, then it could indicate that there is a residual capacity at the base year, over and above any capacity that may arise due to the forecast growth in population and expenditure levels.

- 7.44 The detailed steps underpinning the ('equilibrium') economic assessment are set out in Table 16 (**Appendix 8**). The 'baseline' expenditure and floorspace capacity forecasts based on Experian's population projections are summarised below:

Table 7.12 Borough-wide Capacity – Assuming 'Equilibrium' at 2013

	2013	2017	2022	2028	2031
Residual Expenditure (£m):	0	£3.1	£13.8	£29.7	£35.2
Floorspace Capacity (m² net):					
• Major food superstore:	-	250	1,070	2,255	2,640
• OR Supermarket/Deep Discounter:	-	510	2,230	4,700	5,510

Source: Table 16, Appendix 8 (Step 6, 7 & 8). Based on Experian population projections. Figures have been rounded up/down.

- 7.45 In order to convert the residual expenditure into a net sales floorspace figure we have assumed a major superstore operator will achieve an average sales density of circa £12,500 per m² in 2013 (this is based on the "average" sales performance of the 'top 5' foodstore operators). For smaller format supermarket operators (e.g. Co-Op and Budgens) and/or 'deep discounters' (e.g. Aldi and Lidl) we have applied a lower average sales density of circa £6,000 per m² to the residual expenditure capacity forecasts. The table shows that there is limited forecast Borough-wide capacity for 250m² net of new 'superstore format' floorspace in 2017, increasing to 2,255m² by 2028.
- 7.46 Having assumed 'equilibrium' at the base year, the next step is to determine whether there is any clear quantitative and qualitative evidence to show that existing stores are significantly 'under' or 'overtrading' at the base year. The degree to which the turnover of existing centres/stores significantly exceeds 'benchmark' turnovers may be interpreted as a qualitative indicator of need (for example, it may point to a poor range of existing facilities or limited choice of stores in a catchment area), and may also help to inform quantitative need. However, the use of turnover benchmarks should be treated with caution unless they are corroborated by other independent evidence of under-performance or strong over-trading (such as, for example, the results of in-centre and in-store health checks, or evidence of congestion and overcrowding in stores).
- 7.47 Table 1 (**Appendix 10**) sets out the 'benchmark' turnovers of all existing foodstores and convenience floorspace in the Borough and its main centres based on estimated net sales areas and company average turnover levels derived from a variety of sources, and informed by our own judgements. In this case the quantitative analysis of the trading performance of the Borough's centres/stores has identified that they are, in total, trading above estimated 'benchmark' levels. This is principally explained by the strong sales performance of the Asda and Sainsbury's stores in Nuneaton. Together these stores are estimated to have a total current (survey-derived) turnover of £103.6m in 2013 (2011 prices) (Table 9, **Appendix 8**), which is some £30m higher

than their estimated 'benchmark' turnovers of £74m based on company averages. Our audits of these stores over a period of time also confirm that both stores do appear to be trading strongly.

- 7.48 In this context, Table 19 (**Appendix 8**) sets out the alternative capacity forecasts for new convenience goods floorspace based on potential conditions of 'over-trading' in the Borough's main food stores at 2013. The results are summarised below.

Table 7.13 Revised Capacity – Assuming 'Over Trading' at 2013

	2013	2017	2022	2028	2031
Residual Expenditure (£m):	£11.8	£15.0	£25.9	£42.1	£47.8
Floorspace Capacity (m² net):					
• Major food superstore:	940	1,190	2,010	3,200	3,580
• OR Supermarket/Deep Discounter:	1,960	2,470	4,190	6,660	7,470

Source: Table 19, Appendix 8 (Step 6, 7 & 8). Based on Experian population projections. Figures have been rounded up/down.

- 7.49 The table shows capacity for 1,190m² net of new superstore format floorspace in 2017, rising to 3,200m² by 2028. As explained above, this higher capacity is supported by the strong trading performances of Asda and Sainsbury's in Nuneaton. We advise the Council that the majority of this forecast capacity should be allocated to either support the extension of these existing stores, and/or provide new foodstore competition closer to the town's primary shopping area in a location that is well connected and able to generate significant linked trips.
- 7.50 To further help inform the Council's plan-making and allocation of sites, the table below shows the likely forecast capacity for new superstore format retailing in Nuneaton Town Centre (Tables 17 and 20, **Appendix 8**) and Bedworth Town Centre (Tables 18 and 21, **Appendix 8**) based on 'equilibrium' and 'overtrading' at the base year.

Table 7.14 Town Centre – Convenience Goods Capacity

	2013	2017	2022	2028	2031
NUNEATON TOWN CENTRE:					
• 'Equilibrium'	0	50	520	1,200	1,420
• 'Over-trading'	1,080	1,120	1,600	2,280	2,500
BEDWORTH TOWN CENTRE					
• 'Equilibrium'	0	110	300	580	670
• 'Over-trading'	-129	-20	170	450	540

Source: Tables 17, 18, 20 and 21 (Appendix 8). Based on Experian population projections. Figures have been rounded up/down.

- 7.51 As the table shows, there is forecast capacity for between 1,200m² and 2,280m² net in Nuneaton Town Centre by 2028, and between 450m² and 580m² net in Bedworth Town Centre.
- 7.52 The residual floorspace capacity of between 468m² net (assuming 'overtrading') and 476m² net (assuming 'equilibrium'²¹) is derived from the Borough's other retail floorspace; principally the smaller district and local centres. This residual floorspace should be allocated to existing centres first (including Nuneaton and Bedworth) in accordance with the NPPF and the NPPG.

Comparison Goods – 'Baseline' Capacity Forecasts

- 7.53 As a starting point for the retail capacity assessment it has also been assumed that the Borough's comparison goods retail market is in 'equilibrium' at 2013.
- 7.54 Table 12 (**Appendix 9**) sets out the detailed steps in the comparison goods capacity approach. An average 'productivity' growth rate of circa +1.5% per annum has been assumed for the period 2011 to 2031 based on Experian's latest Briefing Note. The residual expenditure and floorspace capacity forecasts are summarised in the table below.

Table 7.15 Comparison Goods Capacity – Assuming 'Equilibrium' at 2013

	2013	2017	2022	2028	2031
Residual expenditure (£m):	-	£16.1	£47.7	£102.2	£128.5
Floorspace capacity (m ² net):	-	2,540	6,980	13,700	16,460

Source: Table 12, **Appendix 9** (Steps 5 & 6). Figures have been rounded up/down. Based on Experian population projections. Figures have been rounded up/down.

- 7.55 The forecast expenditure 'surplus' has been converted into a net retail sales area based on an assumed average sales density for all new non-food floorspace of circa £6,000 per m² in 2013. This is broadly equivalent to the average sales density of new comparison goods floorspace trading in prime shopping locations. Notwithstanding this assumption, average sales levels will vary depending on a range of factors, including the type of goods sold by the retailer, the location and quality of the retail floorspace, and the size and affluence of the catchment population. For example, published trading figures show that 'bulky goods' retailers in the DIY, carpet and furniture sectors generally achieve lower average sales levels of between £1,500 and £4,000 per m², whereas large format electrical goods retailers can achieve much higher average sales levels of £7,000 per m² and above.
- 7.56 The Council should be aware that these different sales levels assumptions will have implications for the assessment of the need for, and impact of different types of

²¹ The residual floorspace is the total forecast capacity at 2028 (i.e. 2,253m² net) minus the capacity forecasts for Nuneaton (1,199m² net) and Bedworth (579m² net).

comparison goods retailing. It will also be a material consideration for the local planning authority when assessing and determining applications for large format retailing (such as retail warehouses for example).

- 7.57 Having assessed capacity up to 2031 assuming 'equilibrium' at 2013, we have also examined whether Nuneaton and Bedworth Town Centres exhibit any quantitative and qualitative signs of 'overtrading'. Based on audits and health checks conducted in both town centres, the feedback from the stakeholder consultation, the scale of comparison goods floorspace in both centres, and current vacancy levels, we conclude that there is no clear evidence to suggest that the Borough's main centres and stores are overtrading. On this basis we assume that there is no 'pent-up' residual expenditure capacity at the base year.
- 7.58 To further help inform the Council's plan-making and allocation of sites, the table below shows the likely forecast capacity for new comparison goods retailing in Nuneaton Town Centre (Table 13, **Appendix 9**) and Bedworth Town Centre (Table 14, **Appendix 8**) based on 'equilibrium' at the base year.

Table 7.16 Town Centre – Comparison Goods Capacity

	2013	2017	2022	2028	2031
Nuneaton Town Centre:	-	2,160	5,920	11,600	13,950
Bedworth Town Centre:	-	300	820	1,600	1,925

Source: Tables 13-14 (Appendix 9). Based on Experian population projections. Figures have been rounded up/down.

- 7.59 As the table shows, there is forecast capacity for 11,600m² of new comparison goods floorspace net in Nuneaton Town Centre by 2028, and 1,600m² in Bedworth Town Centre. The residual (Borough-wide) floorspace capacity of circa 490m² in 2028 is accounted for by the Borough's smaller district and local centres.
- 7.60 As for the convenience goods capacity forecasts, we advise that all forecasts beyond a five year period should be treated with caution. Furthermore, it should be noted that the capacity assessment is based on a standard constant market share approach and does not take account of any potential uplift in market shares and 'retention levels' that can occur within catchment areas due to 'claw back' following the development of new retail floorspace in more convenient and sustainable locations.

'LOWER GROWTH' CAPACITY SCENARIO

- 7.61 As described earlier, we have also tested the 'sensitivity' of the retail capacity forecasts based on the lower population projections produced by Oxford Economics. The detailed tabulations for convenience and comparison goods are set out in **Appendix 11** and **Appendix 12** respectively.
- 7.62 Table 1 identifies the revised population projections for the 19 study zones and the study area as a whole. It shows that the 2011 study area population (sourced from

Experian) of 208,760 will increase to 227,238 by 2028 based on the OE projections. This total population at 2028 is some 11,333 lower than the figure projected by Experian of 238,571. All the other assumptions and forecasts in the 'lower growth' capacity scenario are the same as tested in the 'baseline' capacity scenario.

7.63 On this basis the tables below summarise the revised Borough-wide convenience goods capacity forecasts assuming 'equilibrium' and 'overtrading' at the base year.

Table 7.17 Convenience Goods Capacity – Assuming 'Equilibrium' at 2013

	2013	2017	2022	2028	2031
Residual Expenditure (£m):	-	£0.3	£7.2	£19.3	£23.4
Floorspace Capacity (m² net):					
• Major food superstore:	-	30	560	1,470	1,750
• OR Supermarket / Deep Discounter:	-	55	1,170	3,060	3,650

Source: Table 16, Appendix 11 (Step 6, 7 & 8). Based on OEF population projections. Figures have been rounded up/down.

Table 7.18 Revised Capacity – Assuming 'Over Trading' at 2013

	2013	2017	2022	2028	2031
Residual Expenditure (£m):	£11.0	£11.5	£18.6	£31.0	£35.2
Floorspace Capacity (m² net):					
• Major food superstore:	880	910	1,440	2,350	2,640
• OR Supermarket / Deep Discounter:	1,840	1,900	3,010	4,900	5,490

Source: Table 19, Appendix 11 (Step 6, 7 & 8). Based on OEF population projections. Figures have been rounded up/down.

7.64 The tables show capacity for between 1,470m² and 2,350m² of new superstore format floorspace by 2028. The table below shows that between 750m² and 1,780m² net of this total forecast capacity could be accommodated in Nuneaton Town Centre by 2028. The forecast capacity for Bedworth Town Centre is substantially lower, at between 250m² and 400m² net.

Table 7.19 Town Centre – Convenience Goods Capacity

	2013	2017	2022	2028	2031
NUNEATON TOWN CENTRE:					
• 'Equilibrium'	0	-80	230	750	910
• 'Over-trading'	1,030	960	1,260	1,780	1,950
BEDWORTH TOWN CENTRE					
• 'Equilibrium'	0	60	180	400	460
• 'Over-trading'	-130	-70	50	250	330

Source: Tables 17, 18, 20 and 21 (Appendix 11). Based on Experian population projections. Figures have been rounded up/down.

- 7.65 The residual floorspace capacity derived from all other retail floorspace in the Borough (principally smaller district and local centres) ranges from 320m² net (assuming 'overtrading') to 324m² (assuming 'equilibrium') at 2028. As stated above, this residual should be allocated to existing centres first (including Nuneaton and Bedworth town centres) in accordance with the NPPF and the NPPG.
- 7.66 For comparison goods the revised capacity forecasts based on 'equilibrium' only at the base year are set out in Table 12 (**Appendix 12**) and are summarised below.

Table 7.20 Comparison Goods Capacity – Assuming 'Equilibrium' at 2013

	2013	2017	2022	2028	2031
Residual expenditure (£m):	-	£11.8	£36.7	£82.9	£105.2
Floorspace capacity (m ² net):	-	1,860	5,380	11,110	13,470

Source: Table 12, **Appendix 12** (Steps 5 & 6). Figures have been rounded up/down.

- 7.67 The forecasts show capacity for 1,860m² net in 2017, increasing to 11,110m² net by 2028. This is lower than the capacity forecasts derived from Experian's higher population projections of 2,540m² in 2017 and 13,700m² in 2028.
- 7.68 The majority of this new floorspace capacity is allocated to Nuneaton Town Centre (9,420m² net) in 2028, with more limited capacity identified for Bedworth Town Centre (1,290m² net).

Table 7.21 Town Centre – Comparison Goods Capacity

	2013	2017	2022	2028	2031
Nuneaton Town Centre:	-	1,580	4,560	9,420	11,420
Bedworth Town Centre:	-	210	620	1,290	1,570

Source: Tables 13-14 (**Appendix 12**). Figures have been rounded up/down.

SUMMARY

- 7.69 This section has assessed the capacity for new (convenience and comparison goods) retail floorspace in the study area over the forecast period. It has tested the 'sensitivity' of these capacity forecasts based on the different population projections produced by Experian and Oxford Economics.
- 7.70 The table below summarises the different Borough-wide capacity forecasts for convenience and comparison goods retailing over the development plan period (up to 2028). These forecasts are based on the different population projections and assumptions as to whether existing floorspace is trading at 'equilibrium' at the base year, or 'overtrading' based on both quantitative and qualitative considerations.

Table 7.22 Borough-wide Retail Capacity – Summary Table (m² net)

	2013		2017		2028	
	Experian	OE	Experian	OE	Experian	OE
CONVENIENCE GOODS:						
'Equilibrium'	-	-	250	30	2,255	1,470
'Overtrading'	940	880	1,190	910	3,200	2,350
COMPARISON GOODS:						
'Equilibrium'	-	-	2,540	1,860	13,700	11,110
'Overtrading'	-	-	-	-	-	-

- 7.71 The updated capacity forecasts take into account all extant permissions identified by the local planning authority at the time of preparing this study.
- 7.72 For convenience goods, there is forecast capacity for between 1,470m² net (Table 16, **Appendix 11**) and 2,255m² net (Table 16, **Appendix 8**) by 2028, assuming 'equilibrium' at the base year (2013) and the different Experian/OEF population projections. However there is some quantitative and qualitative evidence that existing stores in Nuneaton (specifically Asda and Sainsbury's) are 'overtrading' at the base year. If this is the case, then the capacity for new convenience goods floorspace increases to between 2,350m² net (Table 19, **Appendix 11**) and 3,200m² net (Table 19, **Appendix 8**) by 2028. By way of reference, the *Convenience Retail Study 2011* identified 'baseline' capacity for 800m² net of new 'superstore format' floorspace in 2016, increasing to 2,010m² net by 2026.
- 7.73 For comparison goods, the capacity forecasts range from 1,860m² net to 2,540m² net in 2017, increasing to between 11,110m² net and 13,700m² net by 2028. In this case there is no evidence to suggest that existing comparison goods floorspace in either Nuneaton or Bedworth Town Centres is 'overtrading' in 2013 based on a range of key performance indicators. By way of reference the Council's previous *Town Centres Study 2011* identified a much higher capacity for between 15,000m² and 19,000m² up to 2021 (ONS based), increasing to between 25,000m² net and 30,000m² by 2026.
- 7.74 The capacity forecasts have identified the potential need for new convenience goods floorspace in the Borough over the development plan period. Following the recent opening of the replacement Tesco Extra store in Bedworth, the quantitative and qualitative need is principally focussed on Nuneaton Town Centre. The survey evidence shows that the town's two main superstores (Asda and Sainsbury's) are trading significantly above their 'benchmark' turnover levels. Assuming 'overtrading' the capacity forecasts indicate that there is potential capacity for between 1,780m² net (Table 20, **Appendix 11**) and 2,280m² net (Table 20, **Appendix 8**) of new convenience floorspace in Nuneaton Town Centre by 2028. This would be sufficient to justify extensions to the town's existing stores, or the potential provision of a new

competing foodstore located closer to the town centre that is well connected to the primary shopping area (PSA) and able to generate significant linked trips in accordance with national and local plan policy objectives.

- 7.75 The forecast capacity for Bedworth Town Centre is substantially lower, at between 250m² net (Table 21, **Appendix 11**) and 450m² net (Table 21, **Appendix 8**) by 2028. This would support extensions to the existing town centre stores, or the provision of smaller format stores (e.g. Sainsbury's Local, M&S Simply Food, etc.).
- 7.76 For comparison goods retailing, any new floorspace capacity should be directed to Nuneaton Town Centre as a priority in order to address the identified 'gaps' in its provision and strengthen its role as the Borough's main shopping centre in compliance with local and national policy. The more detailed comparison goods forecasts show capacity for between 9,420m² net and 11,600m² net in Nuneaton Town Centre by 2028. For Bedworth Town Centre the forecast capacity is substantially lower, at between 1,290m² net and 1,600m² net.
- 7.77 Finally, it is important to restate that capacity forecasts beyond five years should be treated with caution, as they are based on various layers of assumptions and forecasts with regard to the trading performance of existing centres and stores, and the growth in retail spending, etc. For example, if the growth in Internet and multi-channel shopping is stronger than current forecasts suggest, or the 'productivity' growth of existing floorspace is higher, then this will reduce the capacity for new 'physical' space over the long term.

8.0 LEISURE NEEDS ASSESSMENT

- 8.1 Leisure uses can make a significant contribution to a town centre's vitality and viability. A good provision and choice of leisure facilities and uses can help to increase 'dwell times', footfall and turnover, with significant benefits for both daytime and evening economies. However, the commercial leisure sector is highly complex and dynamic. As a result, forecasting the growth of this sector and identifying the need for new facilities is more complicated than for retailing, as the commercial leisure sector is particularly sensitive to changes in economic, population, lifestyle and fashion trends.
- 8.2 Unlike retailing, the approaches designed to forecast the need for new commercial leisure floorspace and uses are also less sophisticated. The NPPF recommends that need assessments for new leisure uses and floorspace should take account of both quantitative and qualitative considerations (paragraph 161). In this context, our analysis therefore focuses on the following key elements:
- a review of the key trends driving market demand in the leisure sector over the last 10-15 years;
 - an audit of current commercial leisure uses in the Borough (both town and out-of-centre) to help identify any potential 'gaps' in provision;
 - a review of the results of the household survey to understand current commercial leisure participation rates and preferences across the Borough; and
 - a broad economic assessment of the need for new additional leisure facilities in Nuneaton and Bedworth based on different approaches.
- 8.3 For the purpose of our assessment we have necessarily focussed on the main commercial leisure uses that can make a significant contribution to the overall vitality and viability of town centres (i.e. cafés, bars, restaurants, cinemas, healthclubs, bowling alleys, etc.).

LEISURE EXPENDITURE GROWTH

- 8.4 Like the retail market, the commercial leisure sector has experienced significant growth in consumer and market demand since the mid-1990s, fuelled by a buoyant economy, growing disposable income and low unemployment levels. Although the leisure sector has not been immune to the impact of the economic downturn since 2007/08, leisure activities remain an important lifestyle choice for many consumers who continue to prioritise leisure over other areas of spending.
- 8.5 Table 8.1 below shows the UK average expenditure per head on leisure services and the average for the defined Nuneaton and Bedworth catchment zones based on Experian data. It shows that UK household spending on leisure services is dominated by the restaurant and cafe category (including pubs), which accounts for circa 60% of total leisure spend. This pattern is broadly repeated across all the zones.

Table 8.1 Estimates of Spending on Leisure Services in 2011 (£ per head)

Leisure Service	Nuneaton Zone	Bedworth Zone	UK Average
Accommodation services	£93	£94	£115
Cultural services	£249	£248	£270
Games of Chance	£188	£209	£167
Hairdressing & grooming	£68	£67	£85
Recreation & Sporting Services	£89	£83	£117
Restaurants, Cafes etc	£910	£885	£1,012
TOTAL	£1,594	£1,587	£1767

Source: Experian, 2011 prices.

Notes: Nuneaton Zone = Zones 1-7 and Bedworth Zones = Zones 8-10 & 13. Borough Area is broadly equivalent to Zones 1-10 and 13.

- 8.6 The table below shows the most recent leisure spend projections by Experian Business Strategies (EBS) as set out in *Retail Planner Briefing Note 11* (September 2013). EBS forecasts show negative annual growth in 2012 and 2013, with stronger growth forecast over the longer term of +1.7% per annum. This forecast growth is higher than annual average historic growth rates of 1% for the period 1982-2012.

Table 8.2 Actual & Forecast Growth in UK Leisure Spend (% per annum)

	2010	2011	2012	2013	2014	2015	2016-30
Leisure Spend	2.0	1.3	-0.9	-0.2	0.7	1.4	1.7

Source: Experian Business Strategies, Retail Planner Briefing Note 11 (September 2013).

- 8.7 The base year expenditure per capita levels on leisure (Table 8.1) have been projected forward to 2031 by applying Experian's forecast annual growth rates (Table 8.2). The forecast average expenditure per capita levels have then been applied to the projected study area population to identify the total available expenditure on leisure and recreation goods and services. As for the retail assessment, we have assessed total available leisure expenditure based on population projections by Experian and Oxford Economics.
- 8.8 Based on the Oxford Economics projections, Table 8.3 shows that the Borough's total leisure expenditure is forecast to increase by 9% (£24.6m) to £297.8m by 2017. Based on Experian's population growth estimates (Table 8.4), growth in leisure expenditure is slightly higher at 10.4% (£28.4m), increasing to £302.7m by 2017. By 2028, total leisure expenditure will increase to between £379m and £396.4m depending on the different population projections.

Table 8.3 Total Available Leisure Expenditure: 2013 – 2028 (£m) – Oxford Economics Population Growth Forecast

Location	2013	2017	2022	2028	Change: 2012 - 2028
Nuneaton Zone	£188.7	£206.1	£231.3	£263.7	39.8%
Bedworth Zone	£84.0	£91.7	£102.1	£115.3	36.4%
Total Borough	£273.2	£297.8	£333.4	£379.0	38.7%

Source: Table 4a (Appendix 13)

Notes: All monetary figures are expressed in 2011 prices. Nuneaton Zone = Zones 1-7 and Bedworth Zones = Zones 8-10 & 13. Borough Area is broadly equivalent to Zones 1-10 and 13.

Table 8.4 Total Available Leisure Expenditure: 2013 – 2028 (£m) – Experian Population Forecast

Location	2013	2017	2022	2028	Change: 2012 - 2028
Nuneaton Zone	£189.5	£210.0	£239.8	£277.1	46.2%
Bedworth Zone	£84.8	£92.7	£104.5	£119.3	40.7%
Total Borough	£274.3	£302.7	£344.3	£396.4	44.5%

Source: Tables 4b to 4 (Appendix 13)

Notes: All monetary figures are expressed in 2011 prices. Nuneaton Zone = Zones 1-7 and Bedworth Zones = Zones 8-10 & 13. Borough Area is broadly equivalent to Zones 1-10 and 13.

- 8.9 The tables show that the Nuneaton Zone accounts for 69.6% of total leisure expenditure in the Borough. As such, it is expected that existing and new leisure uses will be concentrated in Nuneaton to meet local demand. Based on the broad leisure expenditure profile, the majority of the growth in leisure expenditure is likely to be weighted towards eating and drinking out. This highlights the potential to improve the scale and quality of Class A3 uses in Nuneaton and Bedworth town centres over the development plan period, subject to market demand. The aim should be to strengthen the wider mix of leisure uses and attractions in these town centres as a priority, as they are the most convenient and sustainable locations for the majority of the Borough's residents.
- 8.10 In the context of this forecast growth in leisure spend, the following commentary identifies the potential 'gaps' in the commercial leisure offer of the Borough's two main centres, and the likely need for new uses and facilities over the forecast period.

CINEMA NEED

Market Overview

- 8.11 The significant growth in modern multi-screen cinemas over the last twenty years was fuelled by a number of factors, including the increase in Hollywood 'blockbusters' and

- new developments in cinema technology (such as digital 'surround-sound' and, most recently, 3-D screen technology).
- 8.12 Most multiplexes that opened during the 1990s were located on large out-of-centre and edge-of-town sites, often as part of shopping centres, retail parks or mixed leisure schemes featuring bowling, nightclubs and restaurants (such as, for example, Star City in Birmingham). Cinemas are important anchors for leisure and retail schemes, helping to generate footfall outside of shopping hours, linked trips and spin-off expenditure to other shops and facilities, including cafés and restaurants. Multiplexes have also been particularly successful in attracting shoppers and visitors into 'dead' areas of shopping centres, such as upper levels or the ends of malls.
- 8.13 Although cinema audiences grew significantly during the 1990s, the UK cinema market has traditionally been dominated by a handful of operators namely Cineworld, Odeon/UCI; Vue (who operate the multiplexes in Westfield's Stratford and White City schemes); and Showcase (the UK arm of National Amusements of the USA). There was significant consolidation in the UK market in 2012 when Odeon acquired the BFI Southbank and a site from AMC, Vue acquired the Apollo cinema chain and Cineworld acquired Picturehouse. From its beginnings in 1995 Cineworld now operates over 100 cinemas in the UK (including Picturehouse) and accounts for more than one quarter (25.9%) of the cinema box office market. Its most recent openings include the 11-screen cinema on the edge of Leigh town centre in Wigan Borough (November 2011) and as part of Quintain's London Designer Outlet in Wembley (2013).
- 8.14 According to research by Dodona (a specialist consultancy in the cinema industry) in there are 769 cinemas in the UK with a total of 3,817 screens, of which approximately three-quarters are multiplexes (British Film Institute, *Statistical Yearbook 2012*). The rest of the market is mainly represented by smaller multiplex operators and independents which tend to operate non-multiplex cinemas (i.e. less than five screens) and screens in mixed-use venues (such as arts centres).
- 8.15 The cinema industry has not been immune from the recession and there have been some closures since 2008, although the majority have been smaller art centre venues rather than the larger chains. Notwithstanding this, the industry generally appears to be in good health. The latest research shows that box office revenue in 2012 in the combined UK and Irish market increased by 2.9% to £1.17bn, although UK admissions fell back by 1.4% to 170m. Overall the cinema sector has remained relatively resilient in the prevailing economic and consumer environment.
- 8.16 In recent years, cinema operators have also introduced changes to the cinema experience, including premium seating areas and better quality refreshments, such as alcohol and higher quality food. For example, Vue Cinemas introduced their 'Evolution' concept which provides a mix of seating types comprising bean bags and sofas, as well as regular seats. Cineworld has also introduced the 'Screening Room' concept, characterised by leather chairs and table service. The first 558m² 'Screening Room'

cinema opened in June 2011 in the Brewery, Cheltenham and there are plans to roll out more across the UK.

- 8.17 Research by Dodona indicates that although fewer larger multiplex cinemas are being developed, there has been a growth in smaller (Digital) cinemas to serve smaller catchment areas. These Digital cinemas are more flexible and less “space-hungry” as they do not require the large sloping auditoriums needed to accommodate traditional projectors. There are therefore opportunities for the modern cinema offer to be provided in existing buildings. Examples include the HMV in Wimbledon which has a small Curzon cinema above the store.

Existing Provision and Projected Demand

- 8.18 Cinema provision in the Borough consists of the 8-screen Odeon Cinema at Bermuda Park, which forms part of an out-of-centre leisure scheme located between Nuneaton and Bedworth. As described in Section 4, other facilities include a bowling alley, gym, public house and branded restaurants.
- 8.19 The results of the household survey indicate that 49.2% of the Borough’s population visit the cinema. This equates to between 64,000 and 64,500 of the Borough’s total population based on Experian and Oxford Economics’ population growth estimates. Of this total, 88.4% of those residents in the Borough who visit the cinema went to Bermuda Park, followed by Showcase Cinema in Coventry (7.9%). **Appendix 14** illustrates the geographical location of Bermuda Park in addition to competing cinema facilities in Coventry. With regard to frequency of visit, respondents are more likely to visit the cinema on a monthly basis (29%) or once every six months (22%). Only 14% of respondents visit the cinema on a more frequent basis (e.g. once a week or fortnight).
- 8.20 Data from Dodona (a specialist consultancy in the cinema industry) indicates that the average screen density for cinema provision in the Midlands is 5.3 screens per 100,000 people (British Film Institute, Statistical Yearbook 2013). Tables 8.5 and 8.6 below assess the requirement for additional cinema screens in the Borough based on accepted approaches, drawing on both the Experian and Oxford Economics population projections.

Table 8.5 Potential Capacity for New Cinema Screens in the Borough – Oxford Economic Population Growth Forecast

	2013	2017	2022	2028
Borough Population	130,775	133,257	136,360	140,082
Cinema Screen Potential*	6.9	7.0	7.2	7.4
Existing Screen Provision	8	8	8	8

* Notes: Screen density of 5.3 per 100,000 of population is applied, which is based on screen density for the Midlands Region (Source: British Film Institute, Statistical Yearbook 2013; and Dodana Research).

Table 8.6 Potential Capacity for New Cinema Screens in the Borough – Experian Population Growth Forecast

	2013	2017	2022	2028
Borough Population	131,930	136,089	141,448	147,172
Cinema Screen Potential*	6.9	7.2	7.5	7.8
Existing Screen Provision	8	8	8	8

* Notes: Screen density of 5.3 per 100,000 per population is applied, which is based on screen density for the Midlands Region (Source: British Film Institute, Statistical Yearbook 2013; and Dodana Research).

- 8.21 The quantitative assessment suggests that there is currently an adequate provision of cinema screens in the Borough. However, the Borough’s main multiplex cinema is in an out-of-centre location, at Bermuda Park, which is not conducive to encouraging linked trips to other retail and leisure activities in Nuneaton and/or Bedworth Town Centres during the daytime and evenings. It is more likely that linked trips are captured by other leisure facilities within Bermuda Park; in particular the adjoining restaurants. For this reason the provision of a multiplex cinema or cinema/arts centre in Nuneaton town centre would help to anchor the town centre’s commercial leisure offer and create a more diverse and attractive town centre economy. The feedback from the stakeholder engagement also identified the potential for a ‘niche’ or ‘art-house’ cinema in Nuneaton Town Centre as part of a wider civic/arts facility. Stakeholders identified that this could be linked with the town’s connection to film (Ken Loach) and the film study courses offered by King Edward IV College. However, attracting a cinema to Nuneaton will clearly be subject to market interest and demand from operators for representation in the town centre.

EATING AND DRINKING OUT

- 8.22 Food and drink establishments (Class A3, A4 and A5) including restaurants, bars and pubs provide an increasingly important part of a town centre’s wider offer and economy. They also complement other town centres uses, particularly shops, offices and cinemas, helping to lengthen ‘dwell times’ (the time people spend in centres) and increase expenditure as part of the same trip.

Market Overview

- 8.23 Average household spending on leisure services in the UK is dominated by eating and drinking out. Even in the context of the current economic recession this sector has remained buoyant and the latest available research indicates that there are over 22,750 restaurants and 58,000 pubs in the UK²².
- 8.24 In terms of the pub trade, some of the key trends in recent years include:

²² Source: Market & Business Development UK Restaurants Market Development Report (March 2009) and UK Public Houses Market Development Report (August 2010)

- A move to more flexible opening hours (resulting from licensing reforms implemented in November 2005), combined with pressures arising from lower alcoholic drink prices (particularly in supermarkets), has resulted in a number of pub operators widening their food and non-alcoholic beverage. This has resulted in the growth of so-called “*gastro-pubs*” as eating-out destinations in competition with more established restaurants.
- Increased consolidation and closures in the pub industry. According to the Campaign for Retail Ale (CAMRA) there have been 5,800 pub closures since 2008²³. Recent research by CAMRA also suggests that on average between 18 and 26 pubs are closing every week in the UK. CAMRA cite the 42% increase in beer duty in 2008 as the main reason for closures.
- The sale of pubs for conversion to alternative uses has also increased over recent years, particularly for convenience retailing (e.g. Tesco Express and Sainsbury’s Local).
- The Home Office has also introduced a much more aggressive policy towards the pub industry. Powers for local authorities to establish Alcohol Disorder Zones (ADZ) are included in the Violent Crime Reduction Act (2006), which also places a charge on pubs and bars in a designated area to pay for additional policing, environmental and other services in the neighbourhood. This increase in costs is also placing further pressure on the profit margins of some pub operators.

8.25 The restaurant sector has also experienced mixed fortunes during the economic downturn. Some of the key trends driving change in this sector include:

- An increase in promotions and discounts by the multiples to attract customers during off-peak periods (e.g. Pizza Express).
- More discerning customers who are basing their decisions to eat out on value for money, but not at the expense of quality in terms of service, food and the overall experience. Two recent successes are Jamie’s Italian and Cote. There has also been a growth in ‘*all-you-can-eat*’ style restaurants which are aimed at offering value for money (examples include the Taybarns brand owned by Whitbread).
- For families in particular, going out for a meal has become too expensive, and many have switched to staying at home with a takeaway which has increased sales for businesses such as Domino’s Pizza.

8.26 The café sector has also experienced strong growth over the last five years, despite the impact of the economic downturn. The branded coffee chains dominate the market with some 5,222 outlets in 2012 equating to a market share of 54%. Of these, the three leading multiple chains are Costa Coffee (1,552 outlets), Starbucks Coffee Company (757) and Caffé Nero (530), with a combined turnover of £2.3 billion.

²³ Source: Article published by CAMRA on 20th March 2013, www.camra.org.uk

Notwithstanding the rise of the multiples, there has also been growth in independent and specialist cafés and coffee houses, particularly those serving a more luxury or specialist offer (e.g. organic and Fairtrade).

- 8.27 The strong independent coffee sector has fuelled many new start-up businesses in local centres. While many forecasters considered the café market to be saturated a few years ago, a recent study by management consultancy Allegra Strategies predicts that the total UK coffee shop market still has potential for strong growth, and there is forecast to be over 20,000 outlets by 2017, with a total turnover of £8 billion. There would therefore appear to be potential for further growth in the café market, driven mainly by branded coffee chain expansion and non-specialist operator growth.

Existing Provision

- 8.28 Based on the most recent audit of Nuneaton and Bedworth (see Sections 4 and 5), the current provision of Class A3-A5 uses is as follows:

Table 8.7 Current Provision of Class A3-A5 Uses

Location	Class A3		Class A4		Class A5	
	No. of Units	% of Total Units	No. of Units	% of Total Units	No. of Units	% of Total Units
Nuneaton Town Centre	20	5.0%	10	2.5%	18	4.5%
Bedworth Town Centre	3	2.4%	2	1.6%	6	4.9%
Total	23	-	12	-	24	-

Source: Nuneaton and Bedworth Centre Category Reports, Experian Goad (2011 & 2012)

- 8.29 Table 8.7 shows that the main provision of Class A3-A5 uses are concentrated in Nuneaton. Notwithstanding this, the health check in Section 4 demonstrated that the overall scale, quality and choice of cafés and restaurants is limited. For example, only a handful of national brands are trading in the town centre (e.g. McDonalds, Greggs, Costa, and Subway), which is surprising given its role as the main centre for the Borough. The remainder of the offer comprises smaller independent operators. As the health check identified, Nuneaton would benefit from more and better quality restaurants targeted at families (such as Pizza Express) to help draw more people to the town centre and encourage them to stay longer.
- 8.30 Bedworth's offer is even more limited with only three cafés and/or restaurants, although it does have a greater choice of takeaways (Class A5) and drinking 'venues' (Class A4). Costa Coffee also opened in the town following the redevelopment of Tesco, and is proving a popular venue for local residents and shoppers. However, consultation with local stakeholders highlighted the difficulty in attracting restaurant patronage during the evenings and at weekends due to a perceived lack of quality and choice.
- 8.31 The results of the household survey helped to identify where people living in the study area currently prefer to eat and drink. The key results for the Borough are as follows:

- Almost three-quarters (71.3%) of respondents visit restaurants.
- Of this total, over three-quarters of respondents (77%) eat out at least once a month (e.g. once a week to once a month).
- Of those that go to restaurants, there was no clear preference for a particular restaurant in the Borough and wider study area. Based on responses in the Borough only, the largest proportion of respondents (41.5%) choose to eat out in restaurants in Nuneaton, with only 2.5% eating out in Bedworth; and
- Some 52.6% of respondents in the Borough go to pubs and/or bars. Of these some 46.8% drink out at least once a week, 15.8% once every two weeks, and 21.3% go once a month and the remainder between once every two months and once a year.

8.32 In terms of late night entertainment, the Experian Goad survey (2012) classified five units in Nuneaton town centre as nightclub or dance venues ('Sui Generis' Use Class). This equates to 1.2% of total units in the town centre, which is above the UK average (0.25%). Experian did not record any nightclub or dance venues in Bedworth, although the Civic Hall does provide function space that is used for daytime and evening entertainment.

Forecast Demand for Eating and Drinking

8.33 In order to assess the potential capacity for new eating and drinking establishments we have adopted two robust approaches.

8.34 The first approach is based on the assumption that between 15%-30% of the forecast capacity for new comparison goods floorspace (as identified in Section 7) could support a mix of new cafés, restaurants, pubs and wine bars. This assumption is supported by research that specifically identified that the hospitality industry, in its widest sense, "*...forms an important and sizeable proportion of premises averaging 24% of ground floor stock*"²⁴. Furthermore Experian GOAD's centre reports show that on average café's, restaurants, bars, pubs and takeaways account for up to 15% of floorspace and 18% of outlets in the 2,500 shopping areas that they cover. On the basis of the comparison goods capacity forecasts set out in **Section 7** we therefore estimate that there is a potential quantitative need for between 2,380m² and 2,935m² of Class A3-A5 floorspace in the Borough by 2028.

²⁴ The Streetscape of major UK cities', Savills (Winter 2004, pg.3).

Table 8.8 Eating & Drinking Out - Projected Floorspace (gross m²) 2028

Year	Projected Comparison Floorspace (m ² gross)	15% of Comparison Floorspace to A3/A4/A5 Uses (m ² gross)
2017	2,658 to 3,635	399 to 545
2022	7,688 to 9,974	1,153 to 1,496
2028	15,871 to 19,567	2,381 to 2,935

Source: Projected comparison floorspace (gross) derived from Table 12 (Appendix 9 and 12).

- 8.35 The second approach is informed by forecast growth in expenditure on eating and drinking out (see Tables 8.1 and 8.2). Tables 8.9 and 8.10 below set out the different forecasts based on the different population projections by Experian and Oxford Economics. In summary, there is estimated to be between £82.4 and £82.8m of available food and drink spend in 2013 (Tables 8.1 and 8.2). Based on population growth rates identified by Experian and Oxford Economics, eating and drinking spend in Nuneaton is forecast to increase to between £115.2m and £121m by 2028. Bedworth has a smaller level of expenditure at £36.4m in 2013, which is forecast to increase to between £49.6m and £51.4m by 2028.

Table 8.9 Eating & Drinking Out - Forecast Expenditure Growth (£ million) – Oxford Economics Population Growth Estimate

Year:	Nuneaton Zone	Bedworth Zone	Borough Total
2013	£82.4	£36.4	£118.8
2017	£90.0	£39.5	£129.5
2022	£101.1	£43.9	£145.0
2028	£115.2	£49.6	£164.8
Growth 2013-28	£32.8	£13.2	£46.0

Source: Table 6a (Appendix 13).

Notes: Nuneaton Zone = Zones 1-7 and Bedworth Zones = Zones 8-10 & 13. Borough Area is broadly equivalent to Zones 1-10 and 13.

Table 8.10 Eating & Drinking Out - Forecast Expenditure Growth (£ m) – Experian Population Growth Estimate

Year:	Nuneaton Zone	Bedworth Zone	Borough Total
2013	£82.8	£36.5	£119.3
2017	£91.7	£39.9	£131.6
2022	£104.8	£45.0	£149.8
2028	£121.1	£51.4	£172.4
Growth 2013-31	£38.3	£14.9	£53.1

Source: Table 6b (Appendix 13).

Notes: Nuneaton Zone = Zones 1-7 and Bedworth Zones = Zones 8-10 & 13. Borough Area is broadly equivalent to Zones 1-10 and 13.

- 8.36 The household survey provided an indication of market share retention of restaurants in the Borough. The findings show that 41.5% of respondents living in the Borough to

eat out in Nuneaton. For Bedworth, only 2.5% of respondents eat out in Bedworth. This equates to a total market share of 44% for the Borough in total.

- 8.37 By applying these retention rates to total expenditure for food and drink, this provides a more realistic assessment of spend in the Borough. Table 8.11 provides a summary of the revised eating and drinking out expenditure for Nuneaton and Bedworth based on survey-derived market shares (retention).

Table 8.11 Eating & Drinking Out – Revised Expenditure Growth (£ m)

Year:	Nuneaton Zone* (£m)	Bedworth Zone** (£m)	Borough Total (£m)
2013	£49.3 to £49.5	£3.0	£52.3 to £52.5
2017	£53.7 to £54.6	£3.2 to £3.3	£57.0 to £57.9
2022	£60.2 to £62.1	£3.6 to £3.7	£63.8 to £65.9
2028	£68.4 to £71.6	£4.1 to £4.3	£72.5 to £75.9
Growth 2013-28	£19.1 to £22.0	£1.2 to £1.3	£20.2 to £23.4

Source: Tables 8a and 8b (Appendix 13).

Notes: * 41.5% of total eating and drinking out expenditure for Nuneaton. ** 2.5% of total eating and drinking out expenditure for Bedworth. Nuneaton Zone (Zones 1-7) and Bedworth Zones (Zones 8-10 & 13). The total Borough Area is broadly equivalent to Zones 1-10 and 13.

- 8.38 According to the Experian Goad Category Reports for both centres, food and drink outlets currently account for some 6,000m² (gross) of floorspace for in Nuneaton Town Centre (excluding takeaways, nightclubs, club and dance halls) and 883m² in Bedworth.
- 8.39 Table 8.12 summaries the projected floorspace need for eating and drinking assessment set out in Tables 8a and 8b in Appendix 13. Based on the growth of leisure expenditure in Nuneaton's catchment using survey-derived market shares, we forecast that there is potential to accommodate between 2,324m² and 2,672m² (gross) of additional floorspace for food and drink offer up to 2028 (see Table 8.12). For Bedworth, there is potential for an additional 342m² to 393m² (gross).

Table 8.12 Nuneaton and Bedworth - Café, Restaurant and Bar Capacity (m²)

	Gross Floorspace (m ²)	
	Nuneaton	Bedworth
2013 (base)	6,001	883
2017	6,542 to 6,623	962 to 974
2022	7,325 to 7,534	1,077 to 1,108
2028	8,326 to 8,674	1,224 to 1,276
Growth 2013-28	2,324 to 2,672	342 to 393
Growth 2013-28 Borough	2,666 to 3,065	

Source: Tables 8a and 8b (Appendix 13).

Notes: Floorspace does not take account of potential efficiency gain. Floorspace range reflects the difference in population growth estimates identified by Experian and Oxford Economics.

- 8.40 The two approaches result in a similar estimation of floorspace for the Borough as a whole. However, it should be highlighted that the floorspace projections set out in Tables 8.8 and 8.12 should be treated as indicative rather than a target level of floorspace that needs to be achieved.
- 8.41 In this case the forecast need should be directed to Nuneaton and Bedworth town centres first to help increase competition and choice and stimulate their daytime/evening economies, in accordance with national and local policies. However meeting any forecast need for new cafés, restaurants and bars is highly dependent on the level of market demand and confidence in the centres as trading locations. In simple terms the more successful, vital and viable a centre is, the more likely it will be that café and restaurant operators will want to locate there.
- 8.42 As the household survey identifies, a high proportion of the Borough's residents are visiting food and drink venues outside the Borough. For Bedworth, the retention of restaurant custom is particularly low and reflects the limited provision in the centre. Measures to enhance provision could include target marketing of branded restaurant chains (for Nuneaton) and providing more flexible policies to enable change of uses to support new food and drink businesses (for Bedworth). Furthermore, with a national trend for a growth in the coffee market sector, there is likely potential for both Nuneaton and Bedworth to expand its café offer. This could be achieved either by targeting chains that are not present or encouraging business start-up in the specialist café market.

HEALTH & FITNESS NEED

Market Overview

- 8.43 The health and fitness market has generally performed well during the economic downturn. Since 2009, the industry has grown its total market value to £3.86 billion (2.4) and increased its member base by 3.6% and the total number of facilities by 1.7%. According to data from the *Leisure Database Company*, there were an estimated 5,900 private health clubs and public fitness centres facilities in the UK in 2012, a small net decrease from the 5,852 facilities the previous year²⁵. Of these some 3,176 were private clubs and 2,724 were public facilities. The main operators in the market currently include:
- **Esporta, Greens & David Lloyd Leisure** – at the premium end of the market focus on health, racquet and tennis clubs;
 - **Virgin Active & Nuffield Health** (previously Cannons) – dominate the mid-range family-oriented health and fitness market; and

²⁵ The Leisure Database Company – 2012 FIA State of the UK Fitness Industry Report

- **LA Fitness, Fitness First and Bnatyne's Health Clubs** – operate smaller in-town clubs at the more value end of the market.

8.44 However, the most significant growth in the sector in recent years has been fuelled by value and budget operators. The new wave of (“no frills”) fitness clubs include EasyGym, Pure Gym, Fitness 4 Less, Fitspace, TruGym and SimplyGym. Their business models are based on significantly discounted monthly subscriptions (of between £10 and £20 on average) and 24-hour opening. Although these clubs provide a basic offer (for example, they do not generally include fitness classes, personal trainers, swimming pools, saunas or steam rooms) they appear well suited to the current economic climate and are proving popular. A good example is PureGym which opened its first gym in Leeds in 2009 and now currently has over 60 gyms, with a further circa 35 in the pipeline.

8.45 Overall, the proportion of the population in 2012 with a gym membership was estimated at 12% (of which 7.2% were members of private clubs and 5% were members of public facilities). According to the Leisure Database Company, the average number of members per club in the UK is estimated to be 1,426, which takes into account the average for independent venues (726 per club) and leisure chains (2,198 per club). For the larger fitness chains (e.g. David Lloyds, Virgin, LA Fitness, etc.) the average club membership increases to 2,897 while budget chains are even higher at 3,452 members²⁶.

8.46 The rapid growth of this sector has also been characterised by a marked shift in the location of clubs from out-of-centre locations to town centres, often as part of wider mixed use developments. This is helping to create a wider range of attractions and activity in town centres, particularly in the evenings and at weekends. More flexible planning policies will therefore need to be introduced which help to encourage an element of such uses within existing buildings or as part of mixed use schemes.

Existing Provision

8.47 Table 8.8 summarises the current representation of national, regional and independent privately-owned health and fitness operators in the Borough, as well as the Council-owned leisure centre. **Appendix 15** illustrates the geographic location of all private and public sector gyms in the Borough, as well as competing locations.

²⁶ Leisure Database Company

Table 8.13 Leisure Centres, Fitness Clubs & Gyms in the Borough

Facility	Address	Private Sector	Public Sector	Voluntary Sector
NUNEATON:				
Ladypace Ltd	Market Place	✓		
The Fitness Centre	Corporation Street	✓		
TLC Ladies Gym	Abbey Street	✓		
Gym Heaven	Abbey Street	✓		
Cleaver Squash Fitness Club	Weddington Road	✓		
Pingles Leisure Centre	Avenue Road	✓		
Nuneaton & North Warwickshire Centre	Galley Common		✓	
Etone Sports Centre	Leicester Road	✓		
Nuneaton Co-Operative Sports & Social Club	Dugdale Street			✓
Jubilee Sports Centre	Greenmoor Road		✓	
Vibez Fitness for Women	Coleshill Road	✓		
Nuneaton Golf Club	Golf Drive		✓	
BEDWORTH:				
Bedworth Leisure Centre	Coventry Road		✓	
OTHER IN BOROUGH:				
Cannon's Health and Fitness Ltd	Bermuda Park	✓		
Nuffield Health, Fitness & Wellbeing	Bermuda Park	✓		
Bettabodies	Attleborough	✓		

Source: Various

- 8.48 The table shows that there are notable 'gaps' in the provision of branded health and fitness clubs. For example, David Lloyd, Fitness First, Esporta, Virgin Active, Bannatyne Health and Fitness and Energie are not currently represented in the Borough.
- 8.49 Analysis of the household survey shows that over three-quarters (78.3%) of respondents within the Borough do not go to a gym or healthclub and/or go swimming. Of the 21.7% that do go to the gym, the most frequented facilities are:
- Pingles Leisure Club in Nuneaton (19% of respondents);
 - Bedworth Leisure Centre in Bedworth (15.2%); and
 - Cannons Health and Fitness, Bermuda Park (7.4%).
- 8.50 The household survey results also indicate a relatively high level of leakage to facilities outside the Borough. Of the total number of respondents who visit a gym or healthclub and/or go swimming, 24% go to facilities in Hinckley and 4.8% in Coventry. This could reflect the fact that respondents are not satisfied with current provision within the Borough and/or there is a shortfall in the current provision of health and fitness centres.

Forecast Demand for Health and Fitness

- 8.51 The need for health and fitness clubs can be linked to the potential demand arising from population growth at the local level. In this case the Borough's population is estimated to increase by between 9,300 and 17,240 by 2028 (Tables 1a and 1b, Appendix 13). Based on the Borough's average market penetration of 21.7%²⁷ identified by the household survey, this would potentially result in an additional 2,020 to 3,300 new gym and health and fitness members over the forecast period.
- 8.52 It is likely that existing facilities will absorb some of this demand, and average membership levels will change over time in line with the constant changes in fitness facility formats. Notwithstanding this, even based on conservative forecasts, there would appear to be capacity to support an increase in leisure provision in the Borough over the medium to long-term. Based on average membership rates for private fitness clubs identified earlier in this section, this could support one new major operator.
- 8.53 As for the other leisure sectors, addressing this forecast capacity will be dependent on the level of market interest and demand. However, given that there is no major branded health and fitness operator serving the Borough, there does appear to be significant potential for growth at the local level. In turn this could help to increase participation and/or capture some of the 'leaked' trips to health and fitness facilities outside the Borough. There is also potential to attract a budget or value operator, as this type of facility would appeal to a wider customer base.
- 8.54 With population growth focused on Nuneaton Town Centre, this would appear to be the most viable centre for new provision, possibly as part of a mixed use development. However, given that Bedworth is limited to one facility we consider that new leisure provision should also be supported here where the opportunity and market demand arises.

BINGO AND GAMBLING

- 8.55 Gambling represents a significant and growing element of the leisure industry. The main sectors of the gambling industry comprise 'games of chance' (i.e. bingo clubs, casinos, betting shops, amusement arcades, etc.). We briefly describe the key trends in this sector and the forecast need/demand for new facilities in the Borough, if any, based on the available evidence.

Market Overview and Current Provision

- 8.56 The latest research by *The Gambling Commission* (Annual Review 2012/13) indicates that there are over 226 licensed **bingo clubs** in operation in the UK and six new operators were awarded licences for new venues within the last 12-18 months. In the 12 months up to June 2011 some 3.4% of UK adults visited bingo venues, but

²⁷ Participation rate identified from the household survey.

research by Mintel indicates that the industry has experienced a fall in revenues and admissions over recent years as a result of legislative changes (such as the ban on smoking in public places), the impact of the economic downturn and the growth of online gaming.

- 8.57 In response to falling admissions, bingo operators are increasingly taking advantage of the online market and embracing smartphone technology through new 'app' development. This forms part of a wider trend and growth in 'remote/online' gambling, which including gambling activities through the internet, telephone, radio, etc. Bingo operators are also increasingly looking to diversity their customer profile, and are marketing their clubs at a younger, predominantly female audience. As a result there has been an increase in the number of younger and more affluent bingo players over recent years, particularly as deregulation has enabled clubs to offer bigger (national) prizes.
- 8.58 In terms of **Casinos**, research shows that there were some 79 licenced casinos in the UK in March 2013 of which 25 represent remote/online licences²⁸. This sector is dominated by three companies - the Gala Group, Grosvenor Casinos and Stanley Casinos/Stanley Leisure/Genting International. The number of admissions to casinos increased substantially by 25% over the five year period up to 2010/11²⁸. This growth is largely explained by larger new casino venues granted licences under the 2005 Gambling Act.
- 8.59 Based on the available evidence, the Borough currently has three bingo clubs - Bingo Rooms and Grand Bingo in Nuneaton, and Palace Bingo in Bedworth. The household survey results indicate that bingo is not a major leisure activity for the majority of respondents living in the Borough, with only 8.6% indicating that they frequent bingo clubs. Of those that do, the majority visit a bingo club once a week (71%). The Borough also has one **Casino** (Casino Knight in Nuneaton) and one amusement arcade (Sun Spot, also in Nuneaton). In our judgement the Borough appears to be well served by bingo clubs and Casinos. There is no demonstrable need to enhance existing provision to improve competition and choice at the local level, although this will be subject to market interest and demand from other bingo operators. If demand arises in the future, this should be directed to the Borough's main centres first in accordance with national and local plan policy.
- 8.60 In planning for new 'games of chance' consideration will also need to be given to the potential conflict of gambling uses with other wider town centre uses. This is particularly relevant to betting offices with many planning authorities seeking to limit their over-representation in town centres. The latest Experian Goad Category Report identifies six betting offices in Nuneaton, which equates to 1.5% of total town centre uses and is just above the average for centres in the UK (1.4%). Bedworth has three betting offices equating to 2.4% of total centre units, which is also above the national

²⁸ Source: Gambling Commission Annual Review 2012/2013.

average. This suggests a good provision based on the UK average for all centres covered by Experian Goad.

Forecast Demand for Bingo and Casinos

- 8.61 According to the latest Experian data, average annual spend in Nuneaton and Bedworth on 'games of chance' was estimated to be £196 per person in 2013, which equates to approximately 10% of total leisure expenditure. Based on Experian's forecasts of annual growth in leisure spend, we estimate that average expenditure in this specific leisure sector will increase to £238 per capita by 2028. Applying this to population growth identified by Oxford Economics' and Experian over the forecast period, the tables below shows that there will be between £7.9m and £9.4m of available expenditure in the Borough by 2028.

Table 8.14 'Games of Chance' - Total Forecast Available Expenditure (£million) – Oxford Economics Population Growth

£m	Nuneaton Zone	Bedworth Zone	Borough Total
2013	£16.8	£8.5	£25.3
2017	£18.2	£9.1	£27.3
2022	£20.0	£10.0	£29.9
2028	£22.2	£11.0	£33.2
Growth 2013-28	£5.5	£2.5	£7.9

Source: Table 10a (Appendix 13).

Nuneaton Zone = Zones 1-7 and Bedworth Zones = Zones 8-10 & 13. Borough Area is broadly equivalent to Zones 1-10 and 13.

Table 8.15 'Games of Chance' - Total Forecast Available Expenditure (£million) – Experian Population Growth

£m	Nuneaton Zone	Bedworth Zone	Borough Total
2013	£16.9	£8.5	£25.4
2017	£18.5	£9.2	£27.7
2022	£20.7	£10.2	£30.9
2028	£23.4	£11.4	£34.7
Growth 2013-28	£6.5	£2.8	£9.4

Source: Table 10b (Appendix 13).

Nuneaton Zone = Zones 1-7 and Bedworth Zones = Zones 8-10 & 13. Borough Area is broadly equivalent to Zones 1-10 and 13.

- 8.62 The latest Experian Goad Category Report indicates that gambling uses currently account for some 2,824 m² (gross) of floorspace in Nuneaton Town Centre. This equates to 1.4% of total town centre floorspace, which is just below the UK average identified by Experian Goad (1.9%). Based on projected expenditure and current provision, there is likely to be increased demand for this form of activity. Unlike with retail and leisure, projecting future need for 'games of chance' provision is more complex. It is a niche market that responds directly to market demand and changing formats; in particular online activity. In reality, we consider that the popularity of

online gambling is likely to absorb the majority of the forecast growth in expenditure on 'games of chance' over the long term.

TEN-PIN BOWLING

- 8.63 Tenpin bowling has been established as a commercial leisure activity in the UK for over 40 years and remains a strong family and group activity. Research shows that there are currently over 321 bowling centres in the UK²⁹.
- 8.64 This sector benefitted from a period of growth from the mid-1990s onwards, fuelled by the development of large entertainment 'boxes' and leisure parks at one end of the spectrum, and smaller independent specialist bowling facilities at the other end.
- 8.65 A number of the successful bowling facilities opened over the last 15-20 years tend to form part of larger leisure complexes that include multi-screen cinemas, restaurants and nightclubs. It is the critical mass of leisure uses under one roof or as part of leisure parks that helps to underpin the viability of ten-pin bowling centres, which can struggle as standalone attractions.
- 8.66 Examples of the smaller specialist operators include *All Star Lanes* which operates five bowling venues in the UK (four in London and one in Manchester) and largely targets the corporate/ private hire market. *Bloomsbury Bowl Lanes* also operates from smaller venues with sites in Bloomsbury (8 lanes) and Bristol (5 lanes). The company offers a 1950's American-themed bowling venue with ancillary karaoke rooms, venue rooms for hire, DJ booths, bars, small scale cinema and a venue for bands and live performers/comedy nights.
- 8.67 In Nuneaton there is one large 24-lane ten-pin bowling venue at Bermuda Park operated by MFA Bowl. This facility acts as a main anchor for the leisure park alongside the cinema, and includes a café and other leisure activities (such as air hockey and pool tables). The nearest competing venues are located in Coventry (Tenpin at Crosspoint Business Park) and Tamworth (Stykers Bowl at Castle Grounds), with additional facilities located in Birmingham.
- 8.68 The household survey indicates that tenpin bowling is a reasonably popular leisure activity, with over one-quarter (22.6%) of respondents living in the Borough indicating that they partake in this activity. Of those that do visit tenpin bowling facilities, they go infrequently with 39% every six months, 29% every two months and 20% once a year. Only 11% go once a month or more.
- 8.69 In terms of future needs, we consider provision in the Borough is adequately satisfied by MFA Bowl at Bermuda Park. This is based on the relatively good participation levels at the Borough level and the limited forecast growth in this sector over the short to medium term. However, as the economy strengthens and as the population increases

²⁹ Tenpin Bowling Market UK, Mintel (November 2012)

there may be a need for an additional facility over the long term. If this is the case and market demand exists, then a new facility should be directed to the Borough's town centres first to help maintain and strengthen their diversity of offer and evening economies.

CULTURAL ACTIVITIES

- 8.70 The results of the 2010 HTIS show that over one-third (35%) of respondents in the Borough visit museums or places of historical interest. A similar proportion also visited the theatre.
- 8.71 Both Nuneaton and Bedworth have a good choice of theatre, heritage and cultural attractions. For example, Nuneaton has the Abbey Theatre, the Museum and Art Gallery, and The Chilvers Coton Heritage Centre. Bedworth benefits from the Civic Centre, which provides a good schedule of entertainment events (including music and comedy), and the Bedworth Arts Centre, which hosts amateur theatre productions.
- 8.72 The stakeholder engagement identified that these venues and others in the Borough would benefit from improved marketing and promotion to help stimulate visitor numbers. In this context, while there may be limited scope to provide further theatre facilities in the Borough, the stakeholder engagement also identified that there may be potential to create a civic centre in Nuneaton that promotes cultural heritage and the arts, along with the potential for an independent cinema offer.

SUMMARY

- 8.73 As for retailing, the commercial leisure industry faces considerable challenges and pressures in the current economic climate. It is clear that consumers are becoming increasingly selective in terms of where and how they spend their discretionary leisure spending. There will also be a continued increase in at-home activities due to the advances in computers, tablets, television and audio technology. The challenge for town centres and leisure operators in the future will therefore be to attract customers away from their homes.
- 8.74 Table 8.16 shows the percentage of the Borough's respondents to the household survey who indicated that they do not participate in the various leisure activities identified. With the exception of eating and drinking out, the survey results indicate that the majority of the Borough's residents do not normally participate in most leisure activities. This is also reflected in the attitude to leisure provision with majority of respondents in the Borough (74.2%) satisfied with existing provision. Where suggestions for improvement were raised the greatest proportion (5%) highlighted the need for better quality of restaurants.

Table 8.16 Respondents in Borough who do not participate in leisure activities

Leisure Activity	Respondents who do not participate in leisure activities (%)
Eating out in restaurant and/or café	28.7%
Drinking out in a pub/bar	47.4%
Cinema	50.8%
Theatre	65.3%
Museum/place of historical interest	65.5%
Gym/ Healthclub/ Swimming	78.3%
Ten pin bowling	77.4%
Bingo	91.4%

Source: 2011 HTIS.

- 8.75 Our review of the Borough's commercial leisure sector and offer, and the results of the household survey, indicate that whilst the Borough is home to a variety of leisure uses, the choice and quality of facilities in certain areas is limited. There is clearly potential to improve and strengthen the leisure offer in both of the Borough's main town centres to help stimulate their evening economies and increase "dwell times" during the day to the benefit of other shops, businesses and facilities.
- 8.76 In the case of Nuneaton the provision of a cinema as part of a mixed use retail/leisure scheme would significantly strengthen the town centre's overall vitality and viability. Although this would be subject to market demand, an anchor cinema would also help to stimulate the growth of other leisure uses that are currently lacking in the centre (e.g. cafés and restaurants). It was also suggested at the stakeholder event that a civic/arts/cultural venue would represent a major new attraction for the town centre and could possibly incorporate an 'arthouse' or boutique cinema and event space, subject to demand.
- 8.77 Although Bedworth already benefits from the Civic Centre, which is a key asset for the town, the lack of 'linked' facilities and attractions (particularly restaurants) has restricted the potential to promote and grow the evening and night-time economy. The attraction of more restaurants to the town should be a priority, subject to the strength and quality of market demand.

9.0 CONCLUSIONS

- 9.1 This study provides a strategic assessment of the quantitative and qualitative need for new retail (comparison and convenience goods) floorspace and commercial leisure uses in the Borough area and its two main centres. It provides a sound basis, drawing on robust research and survey evidence, to guide the Borough's shopping and leisure needs up to 2028, and to help promote competitive town centre environments in accordance with the NPPF.

BOROUGH-WIDE RETAIL CAPACITY ASSESSMENT

- 9.2 The assessment of the economic capacity for new retail (convenience and comparison goods) floorspace at the Borough-wide level in Section 7 takes account of the different population projections by Experian and Oxford Economics³⁰, as well as the overall trading performance of existing retail floorspace and stores at the base year (2013). The capacity forecasts are summarised in the table below.

Table 9.17 Borough-wide Retail Capacity – Summary Table (m² net)

	2013		2017		2028	
	Experian	OE	Experian	OE	Experian	OE
CONVENIENCE GOODS:						
'Equilibrium'	-	-	250	30	2,255	1,470
'Overtrading'	940	880	1,190	910	3,200	2,350
COMPARISON GOODS:						
'Equilibrium'	-	-	2,540	1,860	13,700	11,110
'Overtrading'	-	-	-	-	-	-

- 9.3 For **comparison goods** there is forecast capacity for between 1,860m² and 2,540m² net of new retail floorspace in 2017, increasing to between 11,110m² and 13,700m² net by 2028. Based on the detailed health check assessments for Nuneaton and Bedworth (see Sections 4 and 5) there is no demonstrable evidence that these town centres are 'overtrading' in 2013 based on a range of key performance indicators (including vacancy levels).
- 9.4 For **convenience goods**, there is limited forecast capacity for new ('superstore format') floorspace of up to 250m² net by 2017 based on the different population projections and assuming 'equilibrium' at the base year (2013). By 2028 there is

³⁰ In this case Oxford Economics project a lower population growth over the study period than Experian. As a result the capacity forecasts based on the Oxford Economic projections are also lower than those based on the Experian population projections.

forecast capacity for between 1,470m² and 2,255m² net of new floorspace in the Borough.

- 9.5 However, there is some quantitative and qualitative evidence to suggest that existing foodstores in Nuneaton (specifically Asda and Sainsbury's) are 'overtrading'. If this is the case, then the capacity for new (superstore-format) convenience goods floorspace will be between 910m² net and 1,190m² net in 2017, increasing to between 2,350m² net and 3,200m² net by 2028. The forecast capacity at 2028 would be sufficient to support either a new superstore (subject to market demand), or extensions to existing stores. As we explain below this new superstore-format floorspace should be directed to Nuneaton Town Centre as a priority to help increase competition and choice at the local level.

NUNEATON TOWN CENTRE

- 9.6 Nuneaton is the principal centre for the Borough, both in terms of its administrative role and the relative scale of its retail and leisure offer. However, the health check evidence set out in Section 4 indicates that there is a 'gap' in the town's retail and leisure offer compared with competing town centres and shopping locations. Nuneaton therefore needs to raise its status and offer in the future to help maintain and strengthen its important role and function in the shopping hierarchy. Without new investment in its retail, leisure and wider town centre offer it is likely that there will be continued and increased leakage to centres outside the Borough (e.g. Coventry), as well as to competing out-of-centre shopping and leisure facilities. This could have a detrimental impact on the town's vitality and viability over the medium to long term.
- 9.7 In terms of the total economic capacity for new retail (convenience and comparison goods) floorspace in Nuneaton Town Centre, the more detailed forecasts in Section 7 show the potential for between 1,500m² and 3,280m² net at 2017, increasing to between 10,170m² and 13,880m² net by 2028 (see Table 9.1).

Table 9.1 Nuneaton Town Centre – Retail Capacity Forecasts (m² net)

	2013	2017	2028
Comparison Goods:	-	1,580 to 2,160	9,420 to 11,600
Convenience Goods:	0 to 1,080	-80 to 1,120	750 to 2,280
TOTAL:	0 to 1,080	1,500 to 3,280	10,170 to 13,880

- 9.8 Following the opening of the replacement Tesco Extra store in Bedworth, the need for new convenience goods floorspace is principally focussed on Nuneaton Town Centre. The survey evidence shows that the town's two main superstores (Asda and Sainsbury's) are trading significantly above their 'benchmark' turnover levels. The forecast capacity up to 2028 would be sufficient to justify major extensions to the

existing Asda and Sainsbury's stores, or the provision of a new foodstore depending on market demand. We advise that any new foodstore proposal should be located in or as close to the town's primary shopping area as possible, as this will help to maximise the potential for linked trips, increased footfall and spin-off expenditure to the benefit of the centre's overall viability and viability.

- 9.9 The forecast capacity for between 9,420m² and 11,600m² of new comparison goods floorspace in 2028 should also be directed to Nuneaton Town Centre in order to address the identified deficiencies in its provision and to help strengthen its role as the Borough's main shopping centre.
- 9.10 In terms of the Nuneaton's commercial leisure offer, the healthcheck (Section 4) and needs/'gap' assessments (Section 8) have identified that the town's current provision is relatively limited for a centre of its size and status. Key 'anchor' leisure attractions (such as a multiplex cinema for example) are located at Bermuda Park and this places the town centre at a competitive disadvantage in terms of attracting new leisure uses and operators. There is therefore a need for a more diverse town centre leisure offer to help strengthen Nuneaton's daytime and evening economy. The increase in trips, footfall and spend generated by a potential new anchor cinema and related leisure uses (principally cafés, restaurants and bars) would not only benefit existing town centre businesses and facilities, but would also help to stimulate market interest and demand from other operators seeking space in the town centre.
- 9.11 As described in Section 3, emerging investment and development activity is showing a move towards more retail and leisure mixed use schemes (e.g. Trinity Leeds). In this context the planned redevelopment of the Vicarage Street area to the east of the town centre, along with other potential development sites, represent an opportunity to meet the identified need for a mix of new (comparison and convenience goods) retail and leisure uses in the town centre over the development plan period. New development on sites that are well connected to the town centre's primary shopping area will also result in significant benefits to existing shops and facilities through increased trips, footfall and 'spin-off' expenditure.

BEDWORTH TOWN CENTRE

- 9.12 Bedworth is a smaller town centre than Nuneaton and mainly serves the more frequent 'day-to-day' needs of its local catchment population and other visitors to the town. It does not generally compete with Nuneaton and the other higher order centres outside the Borough (such as Coventry for example) for major comparison goods and fashion shopping purchases.
- 9.13 Bedworth's future performance and prospects are inextricably linked to its food and convenience offer (including its market), supplemented by its wider service, commercial leisure and town centre uses that help to attract regular trips and spend to the town centre. In this context the new (replacement) Tesco Extra has significantly

increased the scale and quality of Bedworth's food and non-food retail offer since it opened in December 2011. This larger anchor store has helped to claw back shoppers to Bedworth and generated increased footfall and linked trips to the benefit of the town's other shops, businesses and facilities. Fundamentally, at this level in the shopping hierarchy, the maintenance and enhancement of Bedworth's food shopping function is therefore of paramount importance to its overall vitality and viability.

- 9.14 In terms of the economic capacity for new retail (convenience and comparison goods) floorspace in Bedworth Town Centre, the forecasts show the potential for between 140m² net and 410m² net by 2017, increasing to between 1,540m² net and 2,180m² net by 2028 (see Table 9.2).

Table 9.2 Bedworth Town Centre – Retail Capacity Forecasts (m² net)

	2013	2017	2028
Comparison Goods:	-	210 to 300	1,290 to 1,600
Convenience Goods:	-	-70 to 110	250 to 580
TOTAL:	-	140 to 410	1,540 – 2,180

- 9.15 The forecast capacity for new convenience goods floorspace in Bedworth Town Centre of between 250m² net and 580m² net in 2028 could potentially support extensions to its existing town centre stores, or the provision of smaller format convenience stores.
- 9.16 For comparison goods the forecast capacity of between 1,290m² and 1,600m² net could support a limited mix of new larger format and smaller retail units; although this will be subject to the level of market interest and demand. Any new floorspace should be directed to the town centre's primary shopping area as a priority, followed by edge of centre sites that are well connected to the town's existing shops and facilities and capable of generating linked trips and increased footfall to the benefit of Bedworth's overall vitality and viability.
- 9.17 In terms of its leisure provision Bedworth Town Centre benefits from a number of key attractions, such as the Civic Centre and Arts Centre. These key leisure and cultural assets should be widely marketed to help maintain and strengthen their long-term viability. However it is apparent that the lack of 'linked' retail/leisure facilities and attractions (particularly quality places to eat and drink) has restricted the potential to promote and grow the town's evening and night-time economy. The attraction of more quality cafés and restaurants to the town should be a priority, although this will be subject to market interest and demand. In turn, the provision of more cafés and restaurants will help to strengthen the town's overall vitality and viability, as it will encourage shoppers and visitors to "dwell" longer in the town centre, spend more money and increase footfall to the benefit of other shops, businesses and facilities.

10.0 GLOSSARY & ABBREVIATIONS

CITY CENTRES:	The highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions.
TOWN CENTRES:	Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.
DISTRICT CENTRES:	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
LOCAL CENTRES:	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette.
TOWN CENTRE USES:	Main town centre uses are retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, cultural and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).
TOWN CENTRE BOUNDARY:	Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on a proposals map.
PRIMARY SHOPPING AREA (PSA)	Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.
PRIMARY & SECONDARY FRONTAGES	Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses, such as restaurants, cinemas and businesses.
EDGE-OF-CENTRE	For retail purposes, a location that is well connected up to 300 metres from the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances.
OUT-OF-CENTRE	A location which is not in or on the edge of a centre but not necessarily outside the urban area.
OUT-OF-TOWN	A location out of centre that is outside the existing urban area.
CONVENIENCE SHOPPING	Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionery.
SUPERMARKETS	Self-service stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking.
SUPERSTORES	Self-service stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking.
COMPARISON SHOPPING	Comparison retailing is the provision of items not obtained on a frequent basis. These

	include clothing, footwear, household and recreational goods.
RETAIL WAREHOUSES	Large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods, catering mainly for car-borne customers.
RETAIL PARKS	An agglomeration of at least 3 retail warehouses.
WAREHOUSE CLUBS	Large businesses specialising in volume sales of reduced priced goods. The operator may limit access to businesses, organisations or classes of individual.
FACTORY OUTLET CENTRES	Groups of shops specialising in selling seconds and end-of-line goods at discounted prices.
REGIONAL & SUB-REGIONAL SHOPPING CENTRES	Out-of-centre shopping centres which are generally over shopping centres 50,000 square metres gross retail area, typically comprising a wide variety of comparison goods stores.
LEISURE PARKS	Leisure parks often feature a mix of leisure facilities, such as a multi-screen cinema, indoor bowling centres, night club, restaurants, bars and fast-food outlets, with car parking.
CONVENIENCE GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP categories: Food and non-alcoholic beverages, Tobacco, Alcoholic beverages (off-trade), Newspapers and periodicals, Non-durable household goods.
COMPARISON GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP Categories: Clothing materials & garments, Shoes & other footwear, Materials for maintenance & repair of dwellings, Furniture & furnishings; carpets & other floor coverings, Household textiles, Major household appliances, whether electric or not, Small electric household appliances, Tools & miscellaneous accessories, Glassware, tableware & household utensils, Medical goods & other pharmaceutical products, Therapeutic appliances & equipment, Bicycles, Recording media, Games, toys & hobbies; sport & camping equipment; musical instruments, Gardens, plants & flowers, Pets & related products, Books & stationery, Audio-visual, photographic and information processing equipment, Appliances for personal care, Jewellery, watches & clocks, Other personal effects.
SPECIAL FORMS OF TRADING	All retail sales not in shops and stores; including sales via the internet, mail order, TV shopping, party plan, vending machines, door-to-door and temporary open market stalls.
GROSS GROUND FLOOR FOOTPRINT FLOORSPACE	The area shown on the Ordnance Survey map or other plans as being occupied by buildings and covered areas measured externally.
GROSS RETAIL FLOORSPACE	The total built floor area measured externally which is occupied exclusively by a retailer or retailers; excluding open areas used for the storage, display or sale of goods.
NET RETAIL SALES AREA	The sales area within a building (i.e. all internal areas accessible to the customer), but excluding checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts.
RETAIL SALES DENSITY	Convenience goods, comparison goods or all goods retail sales (stated as including or excluding VAT) for a specified year on the price basis indicated, divided by the net retail sales area generating those sales.
FLOORSPACE 'PRODUCTIVITY' ('EFFICIENCY') GROWTH	The percentage by which a retail sales density is assumed to increase annually in real terms over a stated period. The choice of the most appropriate level of growth will depend on individual circumstances, and in particular the capacity of existing floorspace to absorb increased sales. It is also important that selected rates of growth in productivity are compatible with assumptions about the growth in per capita expenditure.
QUANTITATIVE NEED	Is conventionally measured as expenditure capacity (i.e. the balance between the turnover capacity of existing facilities and available expenditure in any given area). Expenditure capacity, or 'quantitative need' can arise as a result of forecast expenditure growth (either through population growth or increase in spending), or by identification of an imbalance between the existing facilities and current level of expenditure available in an area.
QUALITATIVE NEED	Includes more subjective measures such as, for example, consumer choice; the appropriate distribution of facilities; and the needs of those living in deprived areas.

	'Over trading' is also identified as a measure of qualitative need, although evidence of significant over-crowding, etc., may also be an indicator of quantitative need.
OVERTRADING	The extent to which the turnover of existing stores significantly exceeds benchmark turnovers may be a qualitative indicator of need, and in some cases inform quantitative need considerations. For example it may be an expression of the poor range of existing facilities or limited choice of stores and a lack of new floorspace within a locality. In certain cases 'overtrading' occurs when there is an imbalance between demand (i.e. available spend) and supply (i.e. existing floorspace capacity).
BENCHMARK TURNOVER	In the case of specific types of provision (such as foodstores) company average turnover figures are widely available and can provide an indication of a 'benchmark' turnover for existing facilities. However, turnover benchmarks should not be used prescriptively or in isolation to indicate a measure of 'need'. It is important to recognise that a range of factors (such as rental levels and other operating costs) mean that operators are likely to trade at a wide range of turnover levels. Given the inherent margins of error involved in this type of exercise, the use of company averages as benchmarks should be treated with caution unless they are corroborated by other independent evidence of under-performance, or strong trading. Examples might include the results of in-centre health checks, or the extent of congestion in stores and queuing at checkouts.

- END -

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