MELTON BOROUGH COUNCIL

MELTON RETAIL STUDY

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1 INTRODUCTION

1.01 This report has been prepared by White Young Green Planning on behalf of Melton Borough Council. The purpose of the report is to consider retail issues within the Council's review of the Melton Local Plan.

1.02 In response to the requirements of the consultant's brief, the report has been structured to meet the following objectives:

1) To provide a baseline analysis of retailing within the Borough of Melton.

2) To undertake an assessment of qualitative and quantitative need for additional floorspace over the period 2002-2016

3) To provide advice to the Borough Council on the implications for the revised Melton Local Plan of the results of the study.

4) To provide a detailed picture of retail growth in Melton over the next fourteen years; the location and type of retail development and the attractiveness of the Borough as a retail destination.

1.03 The study is intended to address the following specific matters in order to achieve the above objectives:

i) Current and likely trends in the retail market at national and local level;

ii) Analysis of expenditure availability within the defined shopping catchment zones in respect of both convenience and comparison goods;

iii) An assessment of the turnover of existing retail provision within the study area;

iv) An assessment of the quality of the retail offer in Melton Mowbray, Bottesford, Asfordby and surrounding smaller village centres and the extent of qualitative need for additional floorspace for convenience and comparison goods floorspace in the study area. The assessment includes a health check audit of vitality and viability within Melton Mowbray town centre, Bottesford village centre and Asfordby village centre. In addition the assessment considers:

- the appropriateness of the current definition of the town centre boundary;
- the adequacy of parking provision that serves Melton Mowbray town centre;
- the appropriateness of the primary and secondary shopping frontages defined in the adopted local plan.

v) Should quantitative and/or qualitative need be established, an assessment of how that need should be met by applying the sequential approach to site location in the selection of potential retail sites.

1.04 In undertaking these areas of research, due regard has been given to relevant advice contained within PPG6 and subsequent ministerial statements on retail policy matters. The study also takes into account retail information provided by Experian Goad, MapInfo, Focus, Retail Rankings, the Borough Council and the retail study prepared in connection with the Civic Trust Regeneration Unit's work in Melton Mowbray town centre.

1.05 The following areas of new empirical research have been undertaken as part of the report:

- A telephone survey of 750 households in Melton Borough, broken down into zones based on postcode sector geography, in order to ascertain the general patterns of shopping associated with the study area population.

- A survey of retailers, using the Focus database, to estimate future demand for representation in Melton Borough.

Structure of the Report

1.06 The report is set out as follows:

Section 2 Describes the policy context for the preparation of the study, with reference to PPG6; explores the concept of retail need with reference to recent Government ministerial statements; and describes current and emerging retail trends at national and local level.

Section 3 Examines shopping patterns in the study area using the results of the household shopping survey

Section 4 Presents a retail audit of Melton Borough, including: examination of the sub-regional shopping hierarchy; location and accessibility of the town centre; a vitality and viability health check of the town centre, and larger village centres; and an assessment of out-of-centre retail provision.

Section 5 Assesses the quantitative capacity and qualitative need for additional retail floorspace in the Borough over the Local Plan period (including identified retailer requirements)

Section 6 Examines the potential to meet the identified shopping floorspace needs in accordance with the sequential approach to site location.

Section 7 Provides a summary of the main report findings and recommendations regarding retail policies for the review of the Melton Local Plan.

2 PLANNING POLICY CONTEXT AND RETAIL TRENDS

The Policy Context for the Preparation of the Retail Study

2.01 The requirements placed on local planning authorities in preparing their Local Plans are set out in PPG6 in paragraphs 1.4 to 1.17 and more specifically at Annex B. In brief, the local planning authority is required to:

- Consult with business interests and the local community to set out the hierarchy of centres within the town, seek to promote new development within those centres and enhance their existing provision (paragraph 1.5). The relationship between existing centres should be considered, and a policy approach be adopted for each category of centre, having regard to the potential in each centre for change (Annex B4);

- Plan positively for future requirements, and work with the private sector to assess need or market demand (paragraph 1.6). In particular, the local planning authority should take account of broad forecasts of retail demand and the way in which the market will respond to that demand; by reference to location (Annex B4);

- Where such need exists, work in partnership with the private sector to identify additional sites for new development (paragraph 1.8). The site selection process should follow the sequential approach (paragraph 1.10), and sites identified should be suitable, viable for the proposed use, and likely to become available within a reasonable period of time (which has in previous appeal decisions been taken to mean about five years) (paragraph 1.12). Where there is a clearly defined need that cannot be accommodated within or on the edge of existing centres, the local authority may consider combining new development with existing out-of-centre travel generating uses (paragraph 1.17). Special attention should be paid to the accessibility of various sites by a choice of means of transport (Annex B4);

- In assessing capacity, local planning authorities should consult property owners and retailers, and have regard to the opportunities for the expansion of existing centres, to the scope for diversifying town centre activities, to the availability of public transport and to the need to retain or improve open space and recreational opportunities (Annex B4); and

- Where site assembly is required on identified sites, the Local Plan should indicate what action the local planning authority will take to accelerate the process including, if necessary, the use of CPOs (paragraph 1.6).

2.02 Local planning authorities are also advised to monitor the effectiveness of previous local plan strategies aimed at enhancing town centre vitality and viability, and to include within the development plan criteria-based policies for assessing retail proposals outside town centres (Annex B4).

Defining 'Need'

2.03 Paragraph 1.10 of PPG6 makes it clear that if there is no need or capacity for further developments, there will be no need to identify additional sites in the town. However, 'need' is not defined within the policy guidance. Subsequent Ministerial speeches by the former Planning Minister, Richard Caborn, noted on 11 February 1999 that:

> *"'need' should not be regarded as being fulfilled simply by showing that there is capacity (in physical terms) or demand (in terms of available expenditure within the proposal's catchment area) for the proposed development. Whilst the existence of capacity or demand may form part of the demonstration of need, the significance in any particular case of the factors which may show need will be a matter for the decision-maker".*

and, on 24 June, that:

> *"What does 'need' mean? … First would-be developers must demonstrate that need does not mean simply an assertion by the developer that there is market demand. It means that the local planning authority must consider the wider needs of the community as well as the market demand for a plan before it accepts the development plan. If the local authority is satisfied that a need exists, it must also be satisfied that the sequential test has been applied in selecting the site …. Even then, the local authority must also consider whether there will be an adverse impact on the existing centre before it allows the proposal to go forward".*

2.04 A further Ministerial Statement was published in April 2003. The statement accepts that 'need' can be expressed in quantitative and qualitative terms but considers that evidence presented on need is becoming increasingly complicated. It therefore places greater weight on quantitative need. In addition the statement indicates that the following are not indicators of need but may be material considerations:

- contribution that a proposed development might make to the regeneration of a site;
- net employment created by a proposed development.

2.05 Although still a “matter for the decision-maker”, the demonstration of need should generally involve addressing a combination of some or all of the following factors:

- Expenditure capacity;
- Physical capacity;
- Market demand (including retailer requirements for new floorspace and for extensions to existing retail outlets); and
- ‘Wider community needs’, which may include qualitative deficiencies in the existing retail provision that require long shopping journeys to be made.

2.06 The local planning authority should therefore be satisfied that new retail development will satisfy some or all of the criteria set out above prior to allocating sites for such development within its local plan. When such allocations are made, the authority must select sites having regard to the sequential approach, and be satisfied that the scale and character of development will not adversely affect existing centres.

Emerging Retail Trends

2.07 The assessment of future retail demand or ‘need’ should have regard to emerging trends within the industry, which may influence the conclusions of the report. In this respect, recent research by Verdict and Mintel into shopping trends suggests that the face of domestic retailing could alter substantially during the course of the Local Plan period. These projected changes in shopping patterns will have fundamental implications for the way in which town centres are used, and how they will need to respond.

2.08 One of the effects arising from relatively low and stable levels of inflation over recent years in the UK, combined with falling levels of (officially recorded) unemployment, has been a sustained growth in consumer expenditure on comparison goods. However, this has been accompanied by a significant increase in consumer credit resulting in rising levels of personal debt, and also a boom in house prices. Such high annual rates of growth in per capita expenditure on comparison goods are therefore unlikely to remain sustainable in the medium to long term.

2.09 Competition in the comparison goods sector remains intense so that the benefits of the consumer expenditure boom have not been universally experienced by retailers, exemplified by the recent departure of C & A from the UK, the continued difficulties at Littlewoods and the failure of several computer and mobile ‘phone businesses in recent years. Most economic commentators predict that the consumer economy is likely to slow down over the next few years, with the potential for rising interest rates if, for example, the UK decides to join the Euro.

2.10 Within the predicted slow down, different types of retailers in the comparison sector are likely to encounter different futures. In the household sector, specialist furniture and carpet retailers are likely to experience reduced levels of sales as the current boom in house prices dies down. Specialist retailers in the furniture and carpet sector tend to be highly susceptible to changes in consumer confidence. However, the consumer interest in larger retail formats selling a wide range of household furnishings, epitomised by IKEA, appears to be unabated.

2.11 The DIY sector has experienced significant growth in the last few years, aided to a considerable extent by the proliferation of home DIY television programmes, and this sector is likely to prove more resilient in terms of consumer confidence in future years. Within the sector in recent years consolidation has taken place with a move towards fewer operators building larger format stores (typically over 9,000sq.m. g.f.a.) the key beneficiary of this process being B&Q, particularly with its highly successful “Warehouse” format.

2.12 In the electrical goods sector, there is likely to be a further boom in expenditure as new technologies begin to drive the replacement of existing household entertainment systems, such as digital and widescreen televisions and recordable DVDs. Personal Computer demand is likely to experience steady growth through innovations in hard and soft ware and the next generation of mobile phones is likely to stimulate a new surge in sales, once the back up technology is operational.

2.13 In the clothing sector, various experts are predicting lower rates of expenditure growth generally. However, there has been a discernible growth trend in the discount clothes sector with a renewed consumer interest in value for money. Key beneficiaries of this trend have been discount retailers such as Matalan and Peacocks, as well as supermarket based franchises such as George at Asda.

Spatial Implications

2.14 The growing trend towards increased centralisation of services, whereby larger stores serving an extensive catchment area replace a number of smaller stores, as experienced in the DIY retail sector particularly and the financial sector generally, is likely to continue throughout all retail sectors. This is in response to the desire to achieve increasing economies of scale and also to the increasing mobility of customers. District and local centres in particular might be susceptible to this trend, with the effect being increased vacancies caused by relocation.

2.15 New and innovative forms of retailing will continue to require new sites, and not all retailers' preferred formats are likely to be accommodated in existing shopping centres. There is also likely to be an increasing pressure to release existing retail parks from "bulky goods" restrictions to accommodate specialist retailers selling traditional high street goods, particularly sports, toys and clothing goods. Case law suggests that applications to vary or extinguish conditions restricting the type of goods sold from a retail unit in an out of centre (including edge of centre) location, can be considered in the same way as proposals for new floorspace, in that they are subject to the tests of need, the sequential approach to site location and impact.

Emerging Retail Trends - Food shopping

2.16 The food/grocery sector of the retail market has undergone profound changes over the last 10 years and as the result of increasingly tough competition between the major grocery retailers, in terms of price, quality and range of goods sold, further significant changes are likely in the medium to long term. These may potentially take the form of business failures and/or takeovers resulting in a consolidation of the food retail market.

2.17 With the introduction of the test of "need" and the sequential approach, new sites for food retailing are becoming increasingly scarce. In order to retain and enhance existing market shares, during the course of the local plan period, national multiples are likely to continue to adopt the following practices:

- Extend existing premises. There will be pressure for large out of centre stores to upgrade to modern formats, including an increased element of non-food goods and associated services in order to create a one-stop shopping destination; and

- Expand into niche markets such as the local convenience store sector. By serving "local needs" the onus imposed by PPG6 is reduced. Several national multiples now have a format which is associated either with the High Street or petrol filling stations, which are becoming increasingly common and successful. The move of the major operators into this market sector is likely to reduce the number of independent retailers, over the period of the local plan.

2.18 There has been a considerable expansion by the "deep discount" food retail sector in the UK over the last 12 years and it is likely that there will remain pressure for further such development over the local plan period, since the preferred mode of expansion by these operators (in order to ensure maximum operational efficiency) is to provide a number of identical stores serving relatively small population catchment areas (relative to the major supermarket operators), rather than large format stores serving a wide area and seeking to meet all consumer needs under the one roof.

Emerging Retail Trends - A3 Uses

2.19 Over the last decade or so, the two main recent trends in the A3 sector manifest in the high street have been the growth of the themed pub/restaurant and the emergence of the coffee shop. The themed pub/restaurant growth has resulted from a combination of intensified competition in the shrinking traditional public house market, partly brought about by intensified policing of drink-driving laws, a greater understanding in the industry of the commercial benefits of improved dining facilities and a quality food offer, and also a better market awareness of the segmentation and behaviour of different client groups. This trend is likely to continue in the medium term as new formats are tested. In spatial terms the requirements of such developments are usually larger than for traditional pubs and they often require two floors to enable the concept to work. Such developments also tend to seek locations within or close to the core retail area where footfall tends to be at high levels. The developments can therefore have a significant effect on the balance between A1 and A3 floorspace in the primary retail frontage of town centres.

2.20 The coffee shop 'revolution' is an import from the USA and has resulted, in many larger towns and cities, in a plethora of outlets with three or four operators dominating the market. Recent indications from analysts suggest that this trend has already reached virtual saturation point in the UK. Such uses tend to seek busy locations within primary shopping areas and as such they tend to raise similar planning issues to those relating to the theme pub.

Growth in Electronic Commerce

2.21 Transactions over the internet were assessed to account for between £118m and £3,000m in 1999. Recent research indicated that such sales will grow to at least £2.5 billion by 2003, with some forecasts placing the value of transactions as high as £7 billion (i.e. between a 230% and 590% increase over four years) [source: 'Clicks and Mortar', Research and Consumer Services Foresight Panel (RCSFP), 2001]. Verdict Research indicate that online consumer expenditure will increase by 1,000% in the next five years, when it will account for 3.05% of all retail sales in 2004 [source: 'Electronic Shopping 2000', 1999].

2.22 The various growth scenarios terms are 'Explosive' (assuming personal computer (PC) and Digital television DTV) become in common ownership and Government initiatives encourage mass participation). 'Dynamic' (assuming high growth but some social exclusion), 'Active' (growth is high but centred almost exclusively upon affluent customers) and 'Sluggish' (some growth is experienced but most customers do not perceive e-commerce as a benefit). No matter which scenario emerges, all predict that the value of e-commerce transactions will grow substantially over a relatively small period, and that the more affluent members of society will be the most involved.

2.23 Current trends in the use of internet shopping indicate that:

- proportionately fewer people over 55 use internet shopping, and 85% of this age group never expect to go on-line;

- although on-line shopping is dominated by men, the proportion of women using e-commerce has risen from 15% of all users in 1997 to 28% currently;

- e-commerce is used relatively little by people within the C2D social classes; and

- Most goods purchased reflect the interests of early PC users, comprising software, computer equipment and CDs.

2.24 The use of PCs as the principal means of conducting e-commerce is likely to be superseded by DTV and games consoles, Personal Digital Assistants (PDAs) and mobile telephones, all of which will increase the number of socio-economic groups with potential to shop electronically. However, the non-availability to some social groups of credit and electronic cash will remain a barrier to the complete take-up of electronic shopping.

2.25 Nevertheless, the increasing use of e-commerce will have repercussions for the high street. Although likely to account for only 3% of total sales in 2004, or some £7.4 billion, Verdict estimate that 94% of this spending (£7.1bn) would otherwise have been directed to shops, and that this diversion will be greater in some retail sectors (e.g. music and books) than others (clothing and groceries). It is considered likely to have a major effect on high street retailers and mail order companies, whose profit margins (running currently at around 5%) are already being reduced by the downward pressure on prices. Retailers will have to become significantly more efficient in order to become more profitable. This is likely to mean closing marginal operations and the shedding of jobs.

2.26 The implications for the high street may be that:

- The town centre becomes increasingly leisure based as retailers use e-commerce exclusively, as a means of reducing costs. Goods are distributed from depots. Demands for town centre premises declines sharply; or

- Goods are ordered electronically but collected from high street shops. Shops therefore act as distribution and service spaces, and proportionately less space is dedicated to display; or

- E-commerce creates demand for specialist internet shopping ‘malls’ organised around geographical areas or niche consumers; or

- The high street becomes used increasingly by the C2D social groups and its retail composition alters to reflect this patronage; or

- E-commerce does not impact on the high street, but is used to browse for goods prior to purchasing in the town centre. Internet shopping provides a complementary role dealing in specialist or novel transactions and services; or

- High street shops find new opportunities arising from e-commerce. Local shops offer enhanced services, delivering increased levels of customisation and new functions such as community services and play areas added to existing outlets.

3 SHOPPING PATTERNS IN MELTON BOROUGH

Introduction

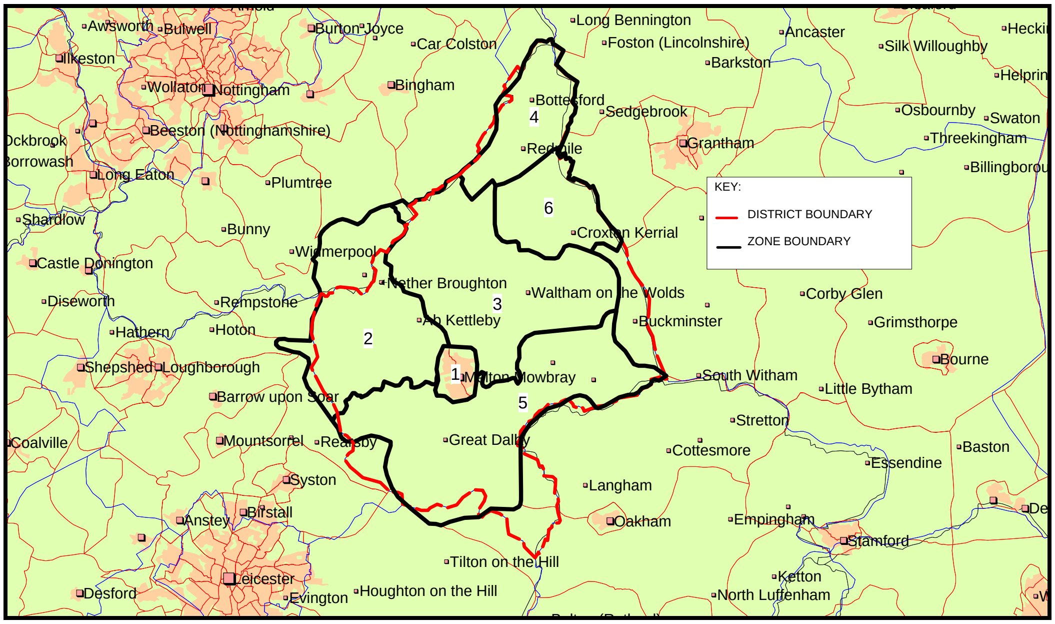
3.01 Melton Borough is located in the north-eastern part of Leicestershire. The borough is mainly rural in nature comprising an area of approximately 48,000 hectares and a population of 47,900 (2001). The principal retail location in the Borough is Melton Mowbray town centre. Melton Mowbray is located centrally within the Borough and consists of a population of approximately 25,000. The market town is situated some 27 km north east of Leicester, 34km south east of Nottingham, 26 km south west of Grantham, and some 18km north-west of Oakham. A plan showing Melton Borough and the location of Melton Mowbray relative to main towns in the sub-region and also the nearest shopping centres to Melton Mowbray is attached at **Appendix A**.

3.02 Evidence regarding the current shopping patterns associated with residents in Melton Borough is available from a household shopping survey carried out as part of this study, the results of which are assessed in the following paragraphs.

Household Shoppers' Survey

3.03 In order to gain a better understanding of convenience and comparison goods shopping patterns within Melton Borough, a specially-commissioned telephone-based household shopping survey was carried out by Research and Marketing Limited. The objective of the survey was to obtain an accurate picture of shopping patterns associated with the Borough's population. A copy of the survey questionnaire and results is attached at **Appendix B** and **Appendix C**.

3.04 The survey involved interviewing a sample of 750 households within six zones defined on the basis of postcode boundaries. A plan showing the geographical extent of the survey area and the zones is shown below, and a more detailed plan is contained at **Appendix D.**



3.05 The following numbers of households were interviewed in each zone.

Zone		No. of Households Surveyed	
		Unweighted	**Weighted**
1	Melton Mowbray	250	324
2	Asfordby	100	125
3	Waltham on the Wolds / Long Clawson	100	113
4	Bottesford	100	66
5	Great Dalby / Wymondham / Somerby	100	106
6	Eaton / Knipton / Croxton Kerrial	100	17

3.06 The actual number of surveys undertaken within each Zone is shown in the left-hand column. The responses were then weighted on the basis of population within each zone. The surveys were carried out between 10 and 24 October 2002. The results of the household shoppers' survey are summarised in the following paragraphs, and more detailed analysis is contained in **Appendix E.**

Food Shopping Patterns

3.07 Table 6 at Appendix E summarises the survey derived patterns for convenience goods (main and top-up) shopping. Overall, the majority of respondents in Zones 1, 2, 3 and 5 visit convenience facilities in Melton Borough for both their main and top-up food shopping whereas in Zone 6 the majority of respondents travel to foodstores outside Melton Borough for both their main and top-up shopping. In Zone 4 the majority of respondents visit convenience facilities outside Melton Borough for their main food shopping, but use facilities within Melton Borough for their top-up food shopping.

3.08 The main food shopping destinations, in terms of their use by survey respondents from the overall study area, are as follows:

- Tesco, Melton Mowbray (42%)
- Safeway, Melton Mowbray (22%)
- Asda, Grantham (7%)
- Co-op, Melton Mowbray (6%)
- W. Morrison, Grantham (5%)
- Kwik Save, Melton Mowbray (5%)

3.09 Within **Zone 1** (Melton Mowbray), the principal destination for main food shopping (accounting for 44% of main food trips) is the Tesco store at Thorpe Road, Melton Mowbray, followed by the Safeway store in the town centre (28%), then by the Co-op store, Scalford Road (9%). The principal destinations for top-up shopping (accounting for 31% of top-up food trips) are various neighbourhood/local stores within the urban settlement of Melton Mowbray. The Safeway store is the second strongest influence on top-up shopping patterns, followed by the out-of-centre stores of Tesco, Thorpe Road and Co-op store, Scalford Road. Overall, the various outlets in Melton Mowbray account for 92% of main food and almost 95% of top-up shopping trips made by respondents in Zone 1.

3.10 Within **Zone 2** (Asfordby), the principal destination for main food shopping is the out-of-centre Tesco store at Thorpe Road. That single store accounts for 46% of all the main food shopping trips within that zone. The Safeway store located within Melton Mowbray accounts for 26% of main food trips, followed by the Co-op store, Scalford Road. In terms of top-up shopping, the highest proportion (34%) of respondents shop in Asfordby village. Overall, the various retail outlets within Melton Mowbray account for some 84% of the main food shopping trips and around 53% of the top-up shopping trips made by residents within Zone 2.

3.11 The influence of the Tesco store at Thorpe Road, is also felt within **Zone 3**. The store is the principal destination for both main (54%) and top-up food (23%) shopping within that zone. Overall, the various retail outlets within the Borough of Melton account for some 72% of main food shopping trips and around 79% of the top-up shopping trips made by respondents in Zone 3.

3.12 The majority (78%) of respondents within **Zone 4** (Bottesford) visit Grantham for their main food shopping trips. Only 9% of respondents stated that their principal destination for main food shopping was within the Melton Borough (5% Tesco, Melton Mowbray, 4% Co-op, Bottesford). In terms of top-up shopping, the village of Bottesford accounts for the majority (65%) of trips made by residents in Zone 4 (41% local store/village shop, 24% Co-op, Bottesford). Overall, the various outlets in Melton Borough account for 9% of main food and 74% of top-up shopping trips made by respondents in Zone 4, indicating a significant level of main food expenditure leakage from that zone to stores located outside the Borough, particularly to the various foodstores located in Grantham.

3.13 For **Zone 5**, the Tesco store at Melton Mowbray is the popular store for main food shopping, accounting for some 47% of trips made, with the Safeway store in Melton Mowbray being the second most popular destination for main food shopping, accounting for 23% of the trips. The various neighbourhood/local shops located within the urban settlement of Melton Mowbray are the most popular destinations for top-up shopping for residents in Zone 5 (accounting for around 28%). The Tesco store, Melton Mowbray is the second most popular destination, which attracts around 16% of respondents, followed by the Safeway store, Melton Mowbray, which attracts 13% of respondents. Overall, the various retail stores within the Borough of Melton account for 75% of main food shopping trips and around 79% of top-up shopping trips made by residents in Zone 5.

3.14 Within **Zone 6**, Grantham is by far the most popular destination for main and top-up shopping trips (accounting for 92% and 63% respectively). The Tesco store, Melton Mowbray, is the only store within the Borough which is used for main food shopping, attracting 6% of respondents. In terms of top-up shopping at stores within the Borough, the Tesco store attracts around 5% of shoppers, while various neighbourhood/local stores located within the urban settlement of Melton Mowbray attract around 9% of respondents. Overall the various stores within the Borough of Melton only account for some 6% of main food and 14.3% of top-up shopping trips made by residents within Zone 6, indicating a significant leakage of expenditure from that Zone to stores located outside the Borough of Melton.

Shopping Patterns for Non-Bulky Comparison Goods

3.15 The questionnaire at Appendix B contains questions about shopping preferences relating to two types of "non-bulky" comparison goods:

- Clothes and footwear – these goods are generally accepted as the most reliable proxy for typical "high street" goods sold in higher order shopping centres.

- Other non-food items (such as books, toiletries, jewellery, and recreational goods) – this category is intended to seek information on shopper preferences relating to purchase of "every day" comparison goods, where respondents are more likely to visit lower order centres to meet their needs.

3.16 The results of the survey of each of those non-bulky comparison goods are summarised below and relate to Tables 9A and 10A at Appendix D.

Patterns of Shopping Relating to Clothes and Footwear

3.17 Shopping patterns relating to clothes and footwear are summarised in Table 9A, Appendix E. Within all of the zones the great majority of respondents mainly shop for clothes and footwear at stores located outside Melton Borough. The main clothes and footwear destinations within each of the survey zones are shown below:

All Zones:	Leicester (28%), Melton Mowbray (27%), Nottingham (24%)
Zone 1:	Leicester (36%), Melton Mowbray (33%)
Zone 2:	Melton Mowbray (32%), Leicester (27%), Nottingham (25%)
Zone 3:	Nottingham (43%), Melton Mowbray (25%)
Zone 4:	Grantham (44%), Nottingham (42%), Melton Mowbray (1%)
Zone 5:	Leicester (38%), Melton Mowbray (22%)
Zone 6:	Grantham (50%), Nottingham (28%), Melton Mowbray (2%)

Shopping Patterns Relating to Other Non-Bulky Comparison Goods

3.18 Shopping patterns relating to other non-bulky comparison goods are summarised at Table 10A, Appendix E. Within Zones 1, 2, 3 and 5 the majority of respondents mainly shop at stores in Melton Town Centre for other non-bulky comparison goods. Not surprisingly the largest recorded proportion of respondents who shop within Melton Mowbray town centre live within Zone 1 (74%). With regard to Zones 4 and 6, only 3% of respondents in Zone 4 and 4% in Zone 5 visit Melton

Mowbray Town Centre for other non-bulky comparison goods. The majority of respondents in the Zones 4 and 5 visit Grantham for other non-bulky comparison goods (60% and 79% respectively).

Shopping Patterns Relating to Bulky Comparison Goods

3.19 For the purposes of this study, “bulky” comparison goods are defined as those falling into three categories which are well established in retail planning practice (and identified in Data Consultancy Information Brief 98/3), as follows:

- **Electrical goods** – incorporating domestic appliances, radio, television and other durable goods (with the latter including musical instruments, photographic equipment, hi-fi equipment, video recorders and computers);

- **Furniture and carpets** – with the latter category including other floor coverings such as vinyl and rugs; and

- **Do-it-yourself and hardware** – with the latter category excluding china and glassware.

3.20 Whilst such goods are frequently sold in town centre stores, the general bulky comparison goods groupings are often used as a proxy for shopping patterns associated with retail warehousing, since many out-of-centre retail parks are subject to restrictive conditions which limit the range of goods that can be sold from the units to those falling within the above three categories.

3.21 In the shoppers’ survey, questions were asked about shopping habits relating to each of the above three categories of goods and the results are summarised below.

Electrical Goods

3.22 Shopping patterns relating to electrical goods are summarised in Table 12A, Appendix E. In respect of Zone 1, the majority of respondents shop at Melton Mowbray Town Centre for electrical goods (62%). Within Zones 2, 3, and 5, between 33% and 50% of respondents look primarily to Melton Mowbray Town Centre to meet their electrical goods requirements. Within Zones 4 and 6 the majority of respondents visit Grantham for their electrical goods shopping (52% and 84% respectively). Less than 5% of respondents in both of these zones visit Melton Mowbray for their electrical goods shopping. The household survey results suggest that a large proportion of residents living within Melton Borough shop in centres outside the Borough for electrical goods.

3.23 The proportion of respondents using the internet or mail order to purchase electrical goods varies over the study area with as many as 10% of the respondents within Zone 5 indicating that they last purchased electrical products via the internet or mail order, with smaller proportions of internet/mail order purchases being identified in Zones 2 (5%) and 4 (5%).

Furniture and Carpets

3.24 Patterns of shopping for furniture and carpets are illustrated in Table 14C, Appendix E. Melton Mowbray accounts for a substantial proportion (but not the majority) of furniture and carpet shopping trips within Zone 1 (43%). Within Zones 2, 3 and 5, between 26% and 32% of residents shop at Melton Mowbray for furniture and carpets. Within Zones 4 and 6 below 5% of respondents visit Melton Mowbray for their furniture and carpets shopping. By far the majority of respondents in Zone 6 shop at Grantham, for their furniture and carpets. In respect of Zone 4 a high proportion of residents shop at Grantham (38%) and Nottingham (31%). This suggests that there is a significant leakage of expenditure relating to furniture and carpets, especially in Zones 4 and 6.

DIY and Hardware

3.25 Table 14E of Appendix E summarises the shopping patterns in respect of DIY expenditure. The main DIY goods destinations within each of the survey zones are as follows:

Zone 1:	Melton Mowbray out-of-town centre (40%); Melton Mowbray town centre (34%)
Zone 2:	Melton Mowbray out-of-town centre (32%); Melton Mowbray town centre (24%)
Zone 3:	Melton Mowbray out-of-town centre (24%); Melton Mowbray town centre (26%)
Zone 4:	Grantham (72%); Melton Mowbray town centre (2%); Melton Mowbray out-of-town (1%)
Zone 5:	Melton Mowbray out-of-town centre (43%); Melton Mowbray town centre (28%)
Zone 6:	Grantham (81%); Melton Mowbray town centre (1%)

3.26 The survey results show that a high proportion of respondents within Zones 1, 2, 3, and 5 shop primarily in Melton Mowbray for DIY goods. Respondents within Zones 4 and 6 mainly travel to Grantham for their DIY goods, with less than 3% travelling to Melton Mowbray, suggesting that a significant proportion of expenditure is spent outside the Borough.

Overall Summary of Shopping Patterns in Melton

3.27 The household telephone survey, carried out as part of this study, to identify shopping patterns for non-food and food goods reveals that:

- For Zones 1, 2, 3, and 5, there is a relatively high level of expenditure retention within Melton Borough relating to main food shopping (ranging from 72% in Zone 3 to 92% in Zone 1). However in Zones 4 and 6 there is significant leakage of expenditure on main food shopping to stores located outside the Borough. In total 76% of residents within the survey zones visit foodstores within Melton Borough for their main food shopping, the remaining 24% of residents shop at foodstores outside the Borough.

- Within Zones 1, 2, 3, and 5 the strongest attractor of main food shopping expenditure is the out-of-centre Tesco store, Melton Mowbray. Within Zones 4 and 6 most of the main food shopping takes place at stores located outside Melton Borough, particularly in Grantham.

- In respect of top-up food shopping there is a high level (86%) of expenditure retention within the Borough. Apart from Zone 6, the majority of respondents in Zones 1 to 5 visit stores within Melton Borough for their top-up shopping.

- For clothes and footwear shopping, the great majority of residents (74%) within the survey zones look primarily to centres outside Melton Borough, notably to Leicester and Nottingham, the remaining 26% of residents shop inside the Borough for clothes and footwear. Melton Mowbray town centre’s market share of clothes and footwear expenditure within the survey zones ranges from only 1% in Zone 4 to 33% in Zone 1.

- In respect of other non-bulky comparison goods expenditure, 57% of residents within the survey zones visit shops within the Borough, while 43% visit shops outside the Borough. Melton Mowbray town centre is the main destination for residents living in Zones 1, 2, 3, and 5. Residents living in the northern part of the Borough (Zones 4 and 6) tend to visit centres such as Grantham and Nottingham, located outside Melton Borough for other non-bulky comparison goods.

- As regards bulky comparison goods the following can be summarised:

    - Electrical Goods – 55% of residents within the survey zones visit stores outside the Borough, while 45% of residents visit stores inside the Borough. A high proportion of respondents within Zones 1, 2, 3 and 5 shop at Melton Mowbray town centre.

Respondents within the northern Zones 4 and 6 tend to shop outside Melton Borough for electrical goods.

- Furniture & Carpets – 69% of residents within the survey zones visit stores outside the Borough, while 31% of residents visit stores inside the Borough. A high proportion of respondents in Zone 1 shop at Melton Mowbray for furniture and carpets goods. The majority of respondents in the other five zones shop at centres outside Melton Borough indicating a significant amount of expenditure leakage.

- DIY Goods – 58% of residents within the survey zones visit stores inside the Borough, while 42% visit stores outside the Borough. A high proportion of respondents within Zones 1, 2, 3, and 5, shop primarily at Melton Mowbray for DIY goods. DIY goods shopping patterns in Zones 4 and 6 are similar to Electrical and Furniture & Carpets goods shopping patterns. By far the majority of respondents in Zones 4 and 6 visit centres outside the Borough (Grantham and Nottingham) for their DIY goods.

4 RETAIL AUDIT OF MELTON BOROUGH

Introduction

4.01 The purpose of this section is to provide an audit of the various centres in the Borough i.e. Melton Mowbray town centre, Asfordby and Bottesford village centres and various other small village centres. A plan showing the location of the town and village centres is contained at **Appendix F**.

4.02 With regard to Melton Mowbray the level of vitality and viability within the centre is assessed with reference to PPG 6 Figure 1 indicators, to the extent that relevant information is available. Relevant information was collected by means of:

i) Visits to the centre in order to update the Experian Goad plan, to observe the quality and range of shopping provision, and to assess levels of trade, pedestrian activity and environmental quality;

ii) Questions in the household shopping survey which seek shoppers' views on the quality of the centre in relation to a range of factors and also views on measures that would encourage higher levels of visitation;

iii) Information on rental values and commercial yields from the Valuation Office Property Market Reports; and

iv) Changes in retail composition over time with reference to historical Goad plan information.

Sub-Regional Hierarchy of Centres

4.03 Experian Retail Rankings Index 2002 (which takes account of a wide range of factors relating to town centre vitality and viability), now ranks Melton Mowbray in 344th position in the UK shopping centres hierarchy, representing a significant fall from 280th position in 2000. The range of factors taken into account by Experian in formulating the Rankings are: number of multiple retailers; number of service and miscellaneous outlets; number of comparison retailer outlets; number of comparison retailer outlets; floorspace of multiple retailer outlets; floorspace of retail outlets; floorspace of vacant outlets and number of key retail attractors.

4.04 Within the sub-regional shopping hierarchy, Melton Mowbray's nearest main centre competitors are Nottingham, Leicester, Leicester Fosse Park, Loughborough, Grantham and Oakham. **Appendix A** and figure 1 below shows the ranking of the surrounding centres and their location relative to Melton Mowbray.

Figure 1: The Sub-Regional Shopping Hierarchy

City/town	Location Relative to Melton Mowbray	Rank 2000	Rank 2001	Rank 2002	Change in Rank 2000-2002
Melton Mowbray	0 km	280	302	344	-64
Oakham	18 km to the south east	-	-	916	-
Grantham	26 km to the north east	259	196	227	32
Leicester	27 km to the south west	8	10	16	-8
Loughborough	29 km to the west	195	163	161	34
Nottingham	34 km to the north west	3	3	4	-1
Leicester Fosse Park	34 km to the south west	-	269	336	-
Peterborough	49 km to the south east	30	33	38	-8

Source: Experian Goad - Retail Centre Ranking 2000, 2001 & 2002

4.05 In summary it can be seen that the largest competing centre in the sub-regional shopping hierarchy is Nottingham, which is situated at number 4 in the rankings. Other competing centres within the sub-region ranked higher than Melton Mowbray include Loughborough, Grantham, Leicester, and Leicester – Fosse Park. However, Melton Mowbray ranks higher than the town of Oakham which, geographically, is the closest centre to Melton Mowbray in the sub-regional shopping hierarchy. From the table it appears that Melton Mowbray, Leicester, Leicester Fosse Park, Peterborough and Nottingham have all experienced a fall in their position in the Rankings in the short term. The town centres of Grantham and Loughborough have both experienced an improved position in the Rankings. With regard to Oakham, historical data relating to the town centre is not available. This is due to the small number of multiple retailers present in previous years. Plans showing the location of Melton Mowbray relative to main towns in the sub-region and also the nearest shopping centres to Melton Mowbray showing their Experian ranking index are attached at **Appendix A**.

Melton Mowbray Town Centre

Structure of the Town Centre

4.06 The adopted Melton Borough Local Plan (1999) does not define a town centre boundary for Melton Mowbray. However, a town centre boundary is defined by Melton Borough Council in their yearly Melton Mowbray town centre health check. The plan at **Appendix G** shows the approximate extent of the town centre boundary. The following analysis of the town centre has regard to the boundary defined in the Health Check.

4.07 The main shopping streets in Melton Mowbray extend along Nottingham Street, Market Place and Sherrard Street. The primary shopping frontage as defined by the adopted Melton Local Plan runs from the Argos Store in Nottingham Street and continues along the north frontage of Market Place and Sherrard Street up to Bowley Court. It also includes Cheapside which runs along the west boundary of Market Place. The secondary shopping frontage can be found along the:

- southern side of Sherrard Street;
- western end of Leicester Road and top of Burton Street;
- western side of Nottingham Street;
- the Bell Shopping Centre and Rowley Court;
- western side of Windsor Street; and
- western end of King Street.

4.08 In addition to the primary and secondary shopping frontages described above, Melton Mowbray town centre benefits from a number of markets selling various items. The main street market trades on Tuesday and Saturdays. It occupies the Market Place, Nottingham Street, Sherrard Street and High Street. Stalls offer fresh vegetables, a mix of other foods, clothing and a variety of small goods. A small craft/antiques market located in the Market Place sells gifts, crafts and other specialist items on a Wednesday. A farmers' market is held every Friday at the Cattle Market and sells a wide range of fresh produce including fruit and vegetables, special meats and crafts. The Cattle Market that is held on Tuesdays also includes a general market where stalls offer fresh produce, meats and craft goods.

4.09 The study brief requested consideration of the appropriateness of the existing primary and secondary shopping frontages (as defined in the Melton Local Plan 1999). In light of a survey of the town centre we recommend no change to the primary and secondary shopping frontages that are currently defined.

Changing Composition within the Town Centre

4.10 In order to assess how the retail area within the town centre has changed over time and hence to provide an indicator of which direction the centre is heading, we have compared and analysed the retail composition figures of the Goad plan used by Drivers Jonas in 1996 with an up-to-date 2002 Goad plan. A copy of an up-to-date Goad Plan (July 2002) is contained at **Appendix G**.

4.11 The overall retail composition of the centre is set out in Figure 2 below.

Figure 2: Retail Composition of Melton Mowbray

	Sept 1996		July 2002		UK Average July 2002
	No	%	No	%	%
Convenience	26	10	26	10	9
Comparison	121	46	125	49	49
Service	67	25	75	29	30
Vacant	49	19	28	11	11
Other	1	0	1	0	1
Total	**264**	**100**	**255**	**100**	**100**

Source: Experian Goad / Drivers Jonas Retail Study 1996
Figures may not add due to rounding

4.12 In summary, the key changes in retail composition are as follows:

i) In respect of the total number of units in the town centre (convenience, comparison, services, vacant and miscellaneous) the centre showed a decrease of nine units between the years 1996 and 2002.

ii) In respect of the convenience sector, between 1996 and 2002 the number of convenience units has stayed the same and remains above the UK average.

iii) The number of comparison units within the town centre has increased by 4 between 1996 and 2002. In percentage terms, comparison outlets have continued to occupy just-under 50% of the total number of retail units over the six year period.

iv) The service sector has shown the greatest increase in number of units with an increase of 8 units between the years 1996 and 2002.

v) The number of vacancies in Melton Mowbray town centre has reduced significantly between the years 1996 and 2002 (49 to 28).

iv) In terms of its overall retail composition in 2002, Melton Mowbray is comparable to the national average proportions of convenience shops, comparison shops, services and vacancies.

Retailer Representation

4.13 In terms of retailer representation, Melton Mowbray consists of a limited range of national multiple retailers. Most of the leading comparison multiples present in the town are situated along Market Place, High Street, Nottingham Street and Sherrard Street. Occupiers of the units in this area include WH Smith, Woolworths, Boots the Chemist, Superdrug, Argos, Clarks Shoes, Dorothy Perkins, Dixons, Wilkinson Home & Garden, Clinton Cards and Curry's. High Street contains most of the leading banks and building societies in the town centre.

4.14 Adding to Melton Mowbray's retail representation are its large number of specialist retailers; in particular those selling the nationally recognised Melton Mowbray Pork Pies and Stilton Cheese. Other specialist retailers including various jewellers and gift shops enhance the attractiveness and uniqueness of the town as well as extending the market town's retail offer.

4.15 Key attractors absent from the comparison shopping sector include retailers such as Marks & Spencer, BHS, Top Man/Top Shop, Debenhams, Principles, River Island, and Next. When compared with the higher order town and city centres, particularly Nottingham and Leicester, the multiple retail offer in Melton Mowbray is somewhat limited.

4.16 Other non-food multiples, namely Halfords, Magnet, Focus Do It All, and Country Store are located in 'stand alone' units outside the town centre.

4.17 Details of retailers who currently have requirements for new floorspace within Melton Mowbray are provided in the following section of this report.

Shopping Rents

4.18 Set out below is a table showing the comparative position of Melton Mowbray town centre with other surrounding retail centres, in respect of current Zone A rental values. The table shows that currently Melton Mowbray town centre has the lowest levels of Zone A rents when compared to surrounding retail centres. This indicates that Nottingham and Leicester, in respect of this indicator are the strongest centres in the sub-region. This is not surprising since Nottingham, Leicester and all the other surrounding centres are larger than Melton Mowbray.

4.19 The PPG6 figure 1 advice relating to shopping rents suggests that the pattern of movement in Zone A rents is a good indicator of the attraction of the centre over time. Figure 3 below therefore looks at changes in rental values in Melton Mowbray town centre between 1992 and 2002 and provides rental values for nearby centres over the same period.

Figure 3: Changes in Rental Values over time in Melton Mowbray and surrounding towns.

Zone A Rent (£ per sq ft pa)						
Location	**1992**	**1994**	**1996**	**1998**	**2000**	**2002**
Melton Mowbray	40	45	40	45	45	45
Leicester	140	135	145	170	200	200
Nottingham	140	135	155	180	210	225
Loughborough	55	55	65	65	65	75
Grantham	55	50	50	55	60	60

Source: Retail Rents by Economic Region (Colliers Conrad Ritblat Erdman 2002)

4.20 Figure 3 shows that there has been a slight increase in rental values within Melton Mowbray Town Centre over the period 1992 to 2002. Melton Mowbray is not unique in experiencing growth in rental values in Zone A retail property over time. Leicester and Nottingham have seen a dramatic increase in their rental values over between 1992 and 2002. Loughborough has seen a steady increase while Grantham's rental values in Zone A retail property have seen a similar growth to that of Melton Mowbray.

Commercial Yields on Non-domestic Property

4.21 In terms of the commercial property market, Figure 4 below shows the most recent Valuation Office Property Market Report highlighting shopping centre yields in Melton and its competing towns. As a measure of retail viability, yields are a useful indicator. As the Property Market Report states: *"The level of yield broadly represents the market's evaluation of the risk and return attached to the income stream of shop rents. Broadly speaking, low yields indicate that a town is considered to be attractive and as a result be more likely to attract investment than a town with high yields."*

Figure 4: Shopping Centre Yields

Shopping Centre	**% Yield**								
	4/94	**4/95**	**4/96**	**4/97**	**4/98**	**4/99**	**4/00**	**4/01**	**4/02**
Leicester	4.75	5.00	5.50	5.00	5.00	5.00	5.00	5.00	4.75
Nottingham	6.50	4.00	5.00	5.00	5.00	4.75	4.75	4.75	5.00
Peterborough	4.50	5.50	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Loughborough	7.50	7.00	7.00	6.50	6.50	5.75	5.50	5.25	5.25
Grantham	7.00	7.00	7.00	7.00	7.00	7.00	7.00	7.00	7.00
Melton Mowbray	10.00	9.50	8.50	8.50	9.00	9.00	8.50	8.00	8.50
Oakham	10.00	9.50	8.50	8.50	9.00	9.00	9.00	8.50	8.50

Source: Valuation Office Property Market Report, Spring 2002

4.22 **Figure 4** shows that retail yields have improved in Melton Mowbray over the last 8 years in common with most of the other towns in the table. The centre has retained its relative position compared with other nearby centres between 1994 and 2002. It has kept pace with Oakham town centre and has improved relative to Grantham. Table 5 also indicates the strength of Leicester, Nottingham, Peterborough and Loughborough compared to other competing towns.

Proportion of Vacant Street Level Property

4.23 As shown in Figure 2, the number of vacant units in the town centre has fallen significantly over the period 1996 to 2002. The current vacancy rate within the town centre, defined by Goad, is 11%, identical to the Experian Goad UK centre average. However, the amount of vacant floorspace in Melton Mowbray (9%) is slightly higher than the current Experian Goad UK centre average of 8%. This is mainly due to two large vacant units located in Scalford Road (former John Smiths Pine premises) and the former indoor market in Sherrard Street.

4.24 The primary and secondary shopping areas have few areas of continuous vacant frontage. In addition the former indoor market in Sherrard Street is undergoing redevelopment. The unit is expected to be taken by Peacock’s clothing, once redevelopment is complete.

Pedestrian Movement

4.25 Observations of pedestrian flows at different periods of the day and on different days of the week were made during field surveys in Melton Mowbray town centre. Pedestrian movement within the town centre is relatively easy because of the compact nature of the centre and good levels of pedestrianisation in Nottingham Street, Market Place and part of High Street. The concentration of pedestrian activity along these traffic-free streets conveys a strong sense of vitality within the centre. Footfall was observed to be at its highest along Nottingham Street and Market Place. Reasonably high levels of footfall were also observed along the western end of Sherrard Street and Leicester Street, and within the Bell Shopping Centre. Lower pedestrian flows were noted within the secondary shopping areas of Windsor Street, King Street and the eastern end of Sherrard Street.

4.26 In March 2002 Melton Borough Council undertook pedestrian flow counts at a number of locations around the town centre on Tuesday (market day) and Thursday. The results support our findings and are summarised in the table below:

Figure 5: Pedestrian Flows in Melton Mowbray Town Centre 2002

Location	Tuesday Persons/minute passing observation line	Thursday Persons/minute passing observation line
Bell Centre	11	7
Burton Street	6	4
High Street	28	15
King Street	8	5
Market Place (S Parade)	67	28
Nottingham Street	61	24
Sherrard Street (N side)	27	12

Source: Melton Borough Council Survey (March 2002)

Accessibility

4.27 The quality of access to the town centre by road is not particularly good. The town is not served by either a motorway or dual carriageway. The following roads distribute the majority of vehicular traffic in and out of the town centre:

- A6006 - Asfordby Road - west
- A606 - Nottingham Road - north west
- A607 - Thorpe Road - north east
- A607 - Leicester Road - south west
- A606 – Burton Road - south east

4.28 The roads in and around the town centre are frequently congested over the majority of the week. Congestion is a notable problem and at its worst on the market days of Tuesday and Saturday.

4.29 The quality and range of car parking in the town centre is reasonably good. Car parking is provided in the following town centre locations:

Council controlled:

- Car park at Wilton Road adj bus station (164 spaces)
- Car park at St Mary's Way (139 spaces)
- Car park at Chapel Street (80 spaces)
- Car park at Nottingham Road adjacent council offices (80 spaces)
- Car park at Burton Street (248 spaces)

Privately owned:

- Car park at Safeway (255 spaces)
- Car park at McDonalds (29 spaces)
- Car park at Kwik Save/Iceland (22 spaces)
- Car park at Asfordby Road/Wilton Road (40 spaces)

4.30 In terms of the location of the town centre's car parks, the household survey shows that 75% of respondents who visit Melton Mowbray town centre believe that car parks in the town centre are conveniently located. Only 13% stated that car parks in Melton Mowbray are not conveniently located, while the remaining 12% either did not know or it was not applicable to them.

4.31 Figure 6 below shows that 50% of the respondents who visit Melton Mowbray town centre stated that they had no difficulty in parking. Only 16% of respondents stated that they always had difficulty in parking, while 21% indicated they sometimes had difficulty parking in Melton Mowbray town centre.

Figure 6: Difficulty in Parking in Melton Town Centre?

	No	**%**
Yes – Always	110	16
Yes – Sometimes	146	21
No	347	50
Not Applicable / Don't Know	86	12
TOTAL	**689**	**100**

Source: Melton Shopping Survey

4.32 In terms of the tariffs of Melton Mowbray's car parks, the majority of respondents (54%) who visit Melton Mowbray town centre believe that car parks are reasonably priced, 28% stated that car parks were not reasonably priced, while the remainder 19% of respondents either didn't know or the question wasn't applicable to them.

4.33 With regard to car parking provision in Melton Mowbray, a Car Park Study was undertaken by White Young Green Planning in May 2003. A copy of the car parking study is attached at **Appendix H**. The purpose of the study was to review the current parking provision in the town centre and to assess if the supply is sufficient to meet the demand placed upon it and to advise on the need for more or less provision.

4.34 In total there are 40 car parks (public and private) and 15 on-street parking areas providing approximately 2,700 spaces. This is a relatively high level of provision in comparison with other market towns for which information is available. The key findings of the car parking study are:

- the current parking provision in Melton Mowbray town centre operates within the theoretical operational capacity of 85% on the busiest days;
- the number of car parking spaces in Melton Mowbray town centre is sufficient to deal with the peak demand on market days; however, the use of these car parking spaces is such that there is an un-even spread of parking.

4.35 In terms of the town centre's main bus stops, a number are located at St Mary's Way, Windsor Street, Sage Cross Street and Wilton Road. Bus services from the various stops in the town centre serve the Borough reasonably well. However services do not run to many of the Borough's 'smaller villages'.

4.36 In addition to numerous bus stops, the town centre is served by the rail network. The railway station is located at the southern end of Burton Street and provides an important link to the cities of Peterborough, Leicester and Nottingham.

4.37 Accessibility for pedestrians within the town centre is significantly enhanced by the existence of the pedestrianised shopping areas of Nottingham Street, Market Place, King Street and part of High Street. The pavement widths along the non-pedestrianised parts of Sherrard Street, Thorpe End and Burton Street are generous, as are the pavements of Leicester Street, Park Road, Windsor Street, and High Street.

Customer Views and Behaviour

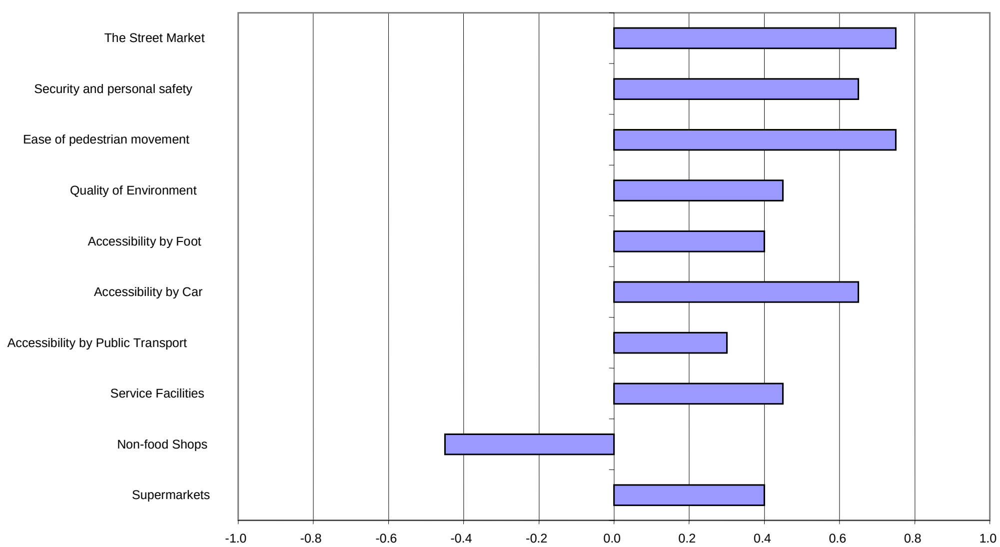
4.38 Information regarding the visitors' views on the vitality and viability of the town centre has been taken from question 14 of the household shopping survey. The various views expressed can be summarised as follows:

- **Food Shopping** – A high proportion (35%) of residents living within Melton Borough visit Melton Mowbray town centre once a week, 29% visit more than once a week, while 18% never visit the town centre for food shopping. Not surprisingly, residents of Zone 1 visit the town centre more regularly for food shopping than residents of other zones.

- **Other Shopping/Services** – Over 50% of residents living within Melton Borough visit the town centre either once a week or more than once a week for other shopping/services. In relation to Zone 1, the highest proportion of residents visit the town centre more than once a week, while the highest proportion of residents living in Zones 2, 3, and 5 visit once a week for other shopping/services. The majority of residents living within Zones 4 and 6 never visit Melton Mowbray town centre for other shopping/services.

- **Leisure Activities** – Approximately 50% of Melton Borough residents never visit Melton Mowbray for leisure purposes. In terms of the individual survey zones, 43% of residents living within Zone 1 never visit the town centre for leisure purposes while by far the majority (over 80%) of residents living within Zones 4 and 6 never visit Melton Mowbray.

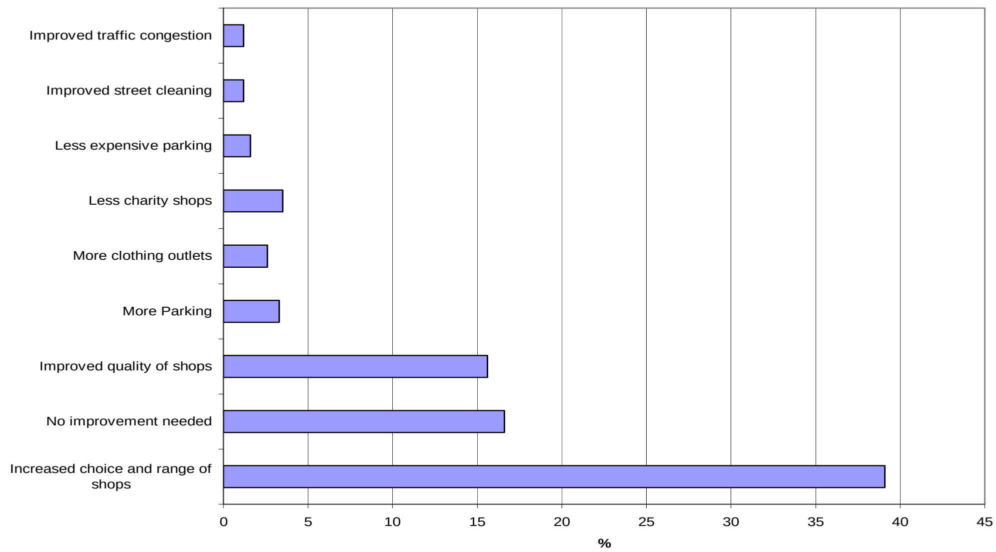
Melton Mowbray Town Centre: User perception/customer rating of Town Centre



Notes: Graph shows average response, where 1 is "Good", 0 is "average", and -1 is "poor"
Source: Melton Shopping Survey

4.39 The graph above shows Melton residents' perceptions of the town centre. Overall, the town centre is perceived favourably in all aspects apart from non-food shops. In particular, ease of pedestrian movement, security and personal safety, the street market and accessibility by car are held in high regard by residents.

Melton Mowbray Town Centre: Possible measures to encourage more visits



Notes: Percentage of respondents answering the question "What measure would encourage you to visit Melton Mowbray town centre more often?"
Source: Melton Shopping Survey

4.40 In terms of encouraging residents to visit more often, it is clear from the graph above that, according to a large proportion of respondents to the shopping survey, improving the range and quality of shops in the town centre would be beneficial.

Perception of Safety and Occurrence of Crime

4.41 As can been seen from the household survey, the views of the respondents are that Melton Mowbray town centre scores well in terms of the levels of satisfaction with security and personal safety. Very few respondents view better security as a measure which would encourage more visits to the town centre.

Town Centre Retailers Survey

4.42 A survey of town centre retailers was carried out by the Melton Borough Council in February 2002. The survey was carried out in order to help establish the performance of the town centre and business/town centre confidence.

4.43 The survey findings are summarised below:

- 43% of traders indicated that their businesses have experienced an increase in sales turnover since the last financial year (April 01-April 02), 9% of traders stated sales turnovers had stayed much the same, while 38% of traders indicated that their sales turnover had decreased. The proportion of traders with an increase in sales turnover has been the highest in four years.

- In terms of changes in turnover by types of business, the majority (68%) of national multiple retailers indicated that their businesses have experienced an increase in sales turnovers in the last financial year. Independent retailers in the town centre have not performed as well as the national multiples. 50% of independent retailers and 38% of 'local chain' retailers stated that sales turnovers had decreased in the last financial year.

- There are mixed views from retailers with regard to their businesses' future performance. 40% of retailers indicated that their business turnover is likely to improve between April 2002 and April 2003, 12% stated it is likely to stay the same, while 38% indicated that their business turnovers are likely to worsen. The proportion of businesses that consider trade will worsen has increased from results of the previous year's survey.

- In terms of retailer confidence in the performance of the town centre just over 50% of retailers believe that performance will worsen between April 2002 to April 2003, 34% believed that performance would stay the same, while 7% believed it would increase. The lack of confidence in the performance of the town centre has improved when compared to the Council's previous year's study.

State of Town Centre Environmental Quality

4.44 Melton Mowbray town centre contains a mix of buildings from different periods in various conditions. The majority of the buildings are in reasonable condition, but there are a small number of properties that are in need of repair/investment. The environmental quality of the town centre's pedestrianised streets is reasonably high. The streets consist of reasonably high quality paving and street furniture and when the market is trading, the Market Place provides a focal point and adds to the environmental quality of the shopping area.

4.45 The environmental quality and quality of buildings around the secondary shopping area varies. Leicester Street, Burton Street and parts of Sherrard Street have a number of attractive and pleasant buildings. However their environments are marred by the passing heavy traffic.

4.46 Within the primary and secondary shopping areas, there is very little evidence of graffiti or accumulations of litter, suggesting that maintenance levels are high.

Conclusions on the Vitality and Viability of Melton Mowbray Town Centre

4.47 Based on the assessment carried out above, we conclude that Melton town centre displays reasonably high levels of vitality and viability:

- **diversity of uses** – a wide range of uses are located within the town centre

- **retailer representation** – the town centre contains a good range of convenience retailers catering for both top-up and main food shopping. The town centre also benefits from its large number of specialist retailers and the popular street market. However, the centre contains a limited range of multiple retailers selling comparison goods.

- **shopping rents** – although rental values have increased over the period from 1992, current Zone A rents are low compared to Melton Mowbray's surrounding town/city centres.

- **commercial yields on non-domestic property** – yield values within Melton Mowbray have decreased. However the town centre is relatively weak compared to the surrounding town/city centres of Leicester, Nottingham and Loughborough.

- **proportion of vacant street level property** – the centre has seen a substantial decrease in vacant units over the past few years. The primary and secondary shopping areas have few areas of continuous vacant frontage and the current vacancy rate is identical to the national average.

- **pedestrian flows** – pedestrian footfall was observed to be reasonably high throughout the centre, particularly on street market days.

- **accessibility –** accessibility by car to the centre is reasonably good. The centre benefits from a large quantity and range of car parks.

- **customer views and behaviour –** the town centre is perceived favourably in terms of its street market; ease of pedestrian movement; accessibility by foot, car and public transport; its service facilities and supermarkets.

- **perception of safety and occurrence of crime** – Melton Mowbray town centre scores well in terms of the levels of satisfaction with security and personal safety.

- **town centre retailers survey** – The most recent retailers survey shows that (a) the proportion of traders with an increase in sales turnover has been the highest since 1998; (b) there are mixed views from retailers with regard to their businesses future performance; and (c) the lack of confidence in the performance of the town centre has improved since 2001.

- **environmental quality** – the quality of environment within the primary shopping area and some parts of the secondary shopping area is good. However, some buildings within the town centre are in need of investment/repair – particularly along parts of Burton Street, Sherrard Street and Leicester Street.

4.48 Overall, we conclude that Melton Mowbray town centre shows reasonably high levels of vitality and viability. The above assessment demonstrates that the town centre is strong and healthy.

Larger Village Centres within Melton Borough

4.49 As part of this study we have reviewed the current level of vitality and viability within the two larger village centres of Asfordby and Bottesford and have applied PPG6 Figure 1 indicators to the extent the information is available and relevant.

Asfordby Village Centre

4.50 Asfordby village centre is located approximately 3 miles west of Melton Mowbray. The retail centre is located around the ‘T’ junction of Bradgate Lane and Main Street. The majority of units are located within a small 1970s shopping parade along Bradgate Lane, with a number of shop units fronting onto Main Street.

Diversity of Use and Retailer Representation

4.51 Figure 7 shows that the centre consists of 13 retail units of which 3 (23%) are convenience, 4 (31%) are comparison, 5 (38%) are service, and 1 (8%) are vacant. The convenience sector consists of a small Co-op supermarket and CTN, while the comparison sector consists of a chemist, a tv/video repair shop and two units selling kitchen studios. Also within the village centre there is a car garage and three pubs.

Figure 7: Retail Composition of Asfordby Village Centre

Sector	Units	%
Convenience	3	23
Comparison	4	31
Service	5	38
Vacant	1	8
Other	0	0
TOTAL	**13**	**100**

Source: White Young Green Planning survey, November 2002

Figures may not add due to rounding

Vacancy Levels

4.52 At the time of this study there was only one vacant retail unit in the village. The vacant unit is located along at the eastern end of Main Street.

Accessibility

4.53 The village centre is located along the A6006. Access by car from surrounding residential areas is good as is the provision of car parking. In terms of public transport, buses travelling to both Melton Mowbray and Leicester stop on a frequent basis.

Customer Views and Behaviour

4.54 Information regarding frequency of trips has been taken from question 22 of the household shopping survey. The responses relate to residents living within Zone 2 only.

Figure 8: Frequency of Visits – Asfordby Village Centre

	Every day	More than once a week	Once a week	Once every two weeks	Once a month or less	Never
Food Shopping	8%	19%	13%	3%	6%	51%
Other shopping/services	6%	9%	16%	4%	8%	57%
Leisure Activities	0%	6%	7%	1%	3%	83%

Source: Melton Shopping Survey

4.55 Figure 8 shows that 13% of respondents of the Melton Shopping Survey (Zone 2) visit Asfordby village centre once a week for food shopping, 19% visit more than once a week and 8% visit the centre every day. In terms of other shopping/services 16% of respondents visit the village centre once a week for other shopping/services, 9% more than once a week and 6% visit the centre everyday. A very small percentage of residents visit the centre for leisure activities. A significantly high proportion of residents living in Zone 2 never visit Asfordby village centre for either food shopping, other shopping/services or leisure activities. The likely reason for the village centre not being visited for the above activities is mainly due to its proximity to Melton town centre. In addition, the survey zone (zone 2) covers parts of the urban areas of Melton Mowbray where residents live closer to Melton Mowbray and are more likely to visit the town centre then Asfordby village centre.

State of Centre Environmental Quality

4.56 The environmental quality of the village centre is good. The centre is free of graffiti and litter, while paving materials, street furniture and shop frontages are of good condition.

Conclusions on the Vitality and Viability of Asfordby Village Centre

4.57 Asfordby has a reasonably healthy village centre. Despite its proximity to Melton Mowbray the village centre remains virtually free of vacancies. The village plays an important role in serving its local population both for services and small food shops serving top-up shopping needs.

Bottesford Village Centre

4.58 Bottesford village centre is located in the northern tip of Melton Borough, approximately 20km north of Melton Mowbray, 11km north-west of Grantham and 24km east of Nottingham. Its retail units are located primarily on Queen Street, with various units including a building society, and a handmade furniture shop located in Market Street.

Diversity of Use and Retailer Representation

4.59 Figure 9 below shows that the centre consists of 15 units comprising 4 convenience outlets (27%), 4 comparison outlets (27%), 5 service outlets (33%), 1 vacant unit (7%) and 1 miscellaneous outlets (7%).

4.60 Bottesford’s convenience sector consists of two small food supermarkets and a bakers a butchers. Its comparison sector consists of 2 furniture shops and a lawnmower shop; a barbers, restaurant, Chinese takeaway and chip shop are included within its service sector.

Figure 9: Retail Composition of Bottesford Village Centre

Sector	Units	%
Convenience	4	27
Comparison	4	27
Service	5	33
Vacant	1	7
Other	1	7
TOTAL	**15**	**100**

Source: White Young Green Planning survey, November 2002

Figures may not add due to rounding

Vacancy Levels

4.61 The current vacancy rate in the village centre is very low and currently stands at 1 unit (7%).

Accessibility

4.62 The village centre benefits from being located adjacent to the A52 trunk road. However direct vehicular linkage between Bottesford and the remainder of the Borough is poor. Linkage between the village centre, Grantham and Nottingham is very good, whereas road linkage between Bottesford and Melton Mowbray town centre is relatively poor.

4.63 Bottesford village centre is well served by various bus services. Bus routes that stop in the village centre travel to various other surrounding centres including Melton Mowbray, Bingham, Newark, Nottingham and Grantham. In addition, Bottesford contains a small railway station, which provides the village with a direct route to both Grantham and Nottingham.

4.64 In terms of car parks, the village centre benefits from a 38 space car park located along Queen Street and various on-street parking along Church Street, Market Street and Queen Street (approx 75 spaces). Further car parking is also available at the three public houses located within the centre.

Customer Views and Behaviour

4.65 Information regarding frequency of trips has been taken from question 21 of the household shopping survey in relation to residents living within Zone 4.

Figure 10: Frequency of Visits – Bottesford Village Centre

	Every day	More than once a week	Once a week	Once every two weeks	Once a month or less	Never
Food Shopping	29%	27%	23%	2%	6%	13%
Other shopping/services	17%	20%	19%	4%	6%	34%
Leisure Activities	3%	8%	15%	6%	10%	58%

Source: Melton Shopping Survey

4.66 Figure 10 shows that the centre is well used for food shopping, other shopping/services, and to a lesser extent leisure activities. 79% of residents living in Zone 4 of the household shopping survey indicated that they visited the centre either once a week, more than once a week or every day for food shopping, while 57% of residents stated that they visited the centre either once a week, more than once a week or every day for other shopping/leisure activities. In terms of leisure activities, the majority of residents (58%) never visit Bottesford village centre.

State of Centre Environmental Quality

4.67 Bottesford has an attractive village centre. Its retail units are dispersed amongst residential units in the centre creating a mix of interesting buildings. The village is exceptionally clean and free of graffiti. Its attraction is enhanced by hanging baskets and other planting located around the centre. However, the centre's environment is slightly marred by the large amount of on street parking.

Conclusions on the Vitality and Viability of Bottesford Village Centre

4.68 The village centre of Bottesford displays high levels of vitality and viability for a centre of its size and status. It not only consists of a mix of uses well used by residents, it contains only one vacant unit, has an attractive environment and has good accessibility by the majority of modes of transport.

Smaller Village Centres within Melton Borough

4.69 In addition to the two larger village centres analysed above, we have updated information regarding the retail provision of various smaller village centres as identified in the Borough Council's Retail Study 1996 (prepared by Drivers Jonas).

Figure 11: Retail Provision – Smaller Village Centres in Melton Borough

Village	Location in relation to Melton Mowbray	Retail Provision 1996	Retail Provision 2002
Asforby Hill	2.5 km west	post office/general store	None (garden centre off main road)
Buckminster	13 km east	post office/general store/petrol station, florist	post office/general store/petrol station, florist
Burrough on the Hill	10 km south	post office	none
Croxton Kerrial	14.5 km north east	post office, butcher and florist	post office/general store, florist
Eaton	11 km north	post office/general store	post office/general store
Frisby on the Wreake	6.5 km west	Post office/store, newsagents	post office/store, newsagents
Goadby Marwood	9.5km north	post office/general store	post office (part time)
Harby	16 km north	post office/general store, garage	post office/general store, garage
Knipton	16 km north east	post office/general store	post office/general store
Long Clawson	13 km north	Post office, general store, baker, butcher	post office/general store, butcher, baker
Scalford	8 kmnorth	post office/newsagent, general store, baker	post office/general store
Somerby	13 km south	post office/general store, butchers	post office/general store
Stathern	13 km north	post office/general store, general store, butcher	post office/general store, general store, butcher
Waltham on the Wolds	8 km north east	post office/general store, hair salon, garage	post office/general store, hair salon, garage
Wymondham	9.5 km east	post office/general store, newsagent, tearoom	post office/general store, antiques

4.70 Figure 11 shows that the retail provision in many of Melton Borough's smaller villages has declined since 1996.

4.71 Supplementing the above rural retail offer, various mobile shops visit villages around the Borough. These include a butcher, baker, grocer, fishmonger and a fish and chip shop.

4.72 The retail offer in the smaller village centres provide an important local service catering for day-to-day needs, especially for those residents who are without a vehicle or have difficulty in travelling distances.

Out of Centre Retailing

4.73 With reference to food retailing, two of the three largest supermarkets in Melton Mowbray are located outside the town centre, namely the 1,883sq m net Tesco store at Thorpe Road, and 1,858 sq m net Co-op store at Scalford Road.

4.74 In terms of retail warehousing, there is a number of ‘stand alone’ non-food retail warehouses in Melton Borough, all of which are located beyond Melton Mowbray town centre:

- Focus Do It All, Leicester Road, Melton Mowbray (2,323 sq m net):
- Magnet, Jubilee Street, Melton Mowbray (929 sq m net):
- Halfords, Norman Way, Melton Mowbray (900 sq m net):
- Country Store, Scalford Road, Melton Mowbray (900 sq m net):
- Beck Mill Factory Shop, Kings Road, Melton Mowbray (900 sq m net):

A plan showing the locations of all non-food retail warehousing and food stores in Melton Mowbray is attached at **Appendix I**.

4.75 At the time of this report, there were no commitments for further foodstores or non-food retail warehousing in the Borough.

5 THE NEED FOR FURTHER RETAIL FLOORSPACE IN MELTON MOWBRAY, 2002-2016

Introduction

5.01 A key part of the retail study is to identify whether there is a need for further retail floorspace in Melton Mowbray over the Local Plan review period (2002-2016). Identification of need is a prerequisite for seeking to allocate additional land to accommodate new retail development in the emerging Local Plan, using the sequential approach to site location.

5.02 In the light of advice in PPG6 relating to the assessment of retail need and subsequent ministerial clarifications of that advice (the essence of which is summarised at paragraphs 2.03 and 2.05 of this report), the analysis seeks to identify the need for new floorspace on the basis of a combination of quantitative and qualitative factors.

Methodology for Assessing Quantitative Need

5.03 In respect of quantitative need, the results of the household shoppers' surveys, combined with population and expenditure forecasting have been used to determine the expenditure capacity to support new floorspace within the Borough. The assessment addresses quantitative floorspace requirements for convenience and comparison goods, with the latter split into "bulky" and "non-bulky" goods (see paragraph 3.24 for explanation of bulky and non-bulky goods).

5.04 To assess quantitative capacity for each of the goods sectors (convenience, bulky comparison and non-bulky comparison) the following steps have been carried out:

i) Identify the relevant shopping catchment areas for each retail goods sector. In this study, we concentrate on assessing the need of the residents in Zones 1-6 for both comparison and convenience goods, on the basis that the defined area closely correlates with the boundary of Melton Borough. We recognise, however, that no catchment area identified for the purposes of assessing floorspace capacity can be treated as a sealed unit in that there will continue to be expenditure flows into and out of any defined catchment area.

ii) Calculate the current (2002) population and expenditure available within the catchment area and forecast future population and expenditure growth over the Local Plan review period.

iii) Calculate the turnover of stores and centres within the catchment area using the shopping patterns identified in the household shopping survey, taking into account the likely turnover of floorspace committed by planning permission, committee resolution or local plan allocation

iv) Assess the capacity for new retail floorspace using a constant market share approach. This involves calculating growth in turnover on the basis that the existing floorspace maintains a constant market share of the available expenditure within the catchment area as a whole, then subtracting the increase in turnover of committed floorspace within the catchment area (if any). The residual "available" expenditure is then divided by an appropriate average floorspace sales density to derive the "headroom" for further retail floorspace.

5.05 In order to ensure that the assessment is robust we introduce variations in the assumptions used in the methodology and set out the resulting changes to floorspace capacity. The variations which are employed relate only to comparison retailing and involve introducing:

- An allowance for an increase in floorspace efficiency in the existing retail outlets within the catchment area.

- A 5% increase in market share of the expenditure available within the catchment area. In each case the realism of the resulting floorspace headroom arising from the variations in the methodology, is analysed.

5.06 In the quantitative assessment we have used the following data sources and assumptions:

i) All monetary values are given at 1998 prices.

ii) The assessment is carried out on a goods rather than a business basis.

iii) Population information has been derived from MapInfo TargetPro reports for each zone. These give locally derived population figures based on ONS published data. Population projections are based on County population forecasts published by Leicestershire County Council (for the years 2001-2016)

iv) Per capita expenditure has been derived from MapInfo TargetPro reports (which provide local expenditure data) and projected forward using UPRI Information Brief 99/2. The projected growth rate for convenience goods adopted is 0.1% per annum and for all comparison goods the selected growth rate for projections is 3.9% per annum, consistent with advice on forecasting provided in URPI Information Brief 99/2.

v) Market shares of existing retail facilities are taken from the household shopping survey conducted by Research and Marketing. “Don’t know”, “don’t do” and “varies” responses have been excluded.

5.07 With reference to the use of goods based expenditure data (point (ii) above) it is to be noted that the Data Consultancy (URPI) publishes national consumer retail expenditure estimates on two alternative bases:

- Business-based
- Goods-based

5.08 The business-based data give expenditure estimates in convenience and comparison categories defined in terms of the retail businesses in which expenditure is made. The classification relates to businesses as a whole, not to individual shops. The goods-based data give expenditure estimates in convenience and comparison categories defined in terms of the commodities bought.

5.09 The two series (business and goods-based) give average annual growth rates for expenditure per head rates over various time periods. The average annual growth in convenience business expenditure per head is significantly and consistently higher than the corresponding figure for convenience goods expenditure over the same period. Conversely, the average annual growth in comparison business expenditure per head is consistently lower than the corresponding figure for comparison goods expenditure per head over the same period, although the difference is not as marked as for the convenience categories.

5.10 The relatively higher average annual growth in convenience business expenditure per head can be explained by the fact the convenience business expenditure includes an element of comparison goods expenditure, which is increasing at a faster rate. This is partly due to convenience businesses such as the large grocery chains (e.g. Asda, Tesco and Sainsburys) selling comparison goods, including clothing, electrical goods, leisure goods, etc. It is also due to the business classification being by businesses as a whole, not by individual shops. For example, a Co-operative department store would be included in the convenience business classification if the major retailing activity of the business as a whole, the Co-operative Society, were convenience. Conversely, although one of the largest food retailers in the country, Marks & Spencer is classified as a comparison business.

5.11 In analysing retail capacity, it is essential to be consistent throughout the analysis in choosing one basis or the other, and not to mix goods-based data with business-based data. Neither basis can be authoritatively pronounced better, since each has both strengths and weaknesses.

5.12 In general the consumer expenditure data is likely to be more accurate at a local level on a goods basis. While retail business turnover potential figures are commonly used as business based consumer expenditure estimates, these have been derived, as described above, from the consumer retail expenditure figures on a goods basis using an allocation process according to a national pattern but taking no account of the local mix of shops. However, retail floorspace data and company turnover/sales density information is almost always produced on a business basis. Accordingly, whichever expenditure base is used, it is important to be aware of the implications of any potential inconsistencies between the difference data sources.

Expenditure Capacity: Convenience Goods

5.13 Table 1 at **Appendix E** provides population forecasts between the years 2002 and 2016 for each of the household shopping survey zones. Table 2 at Appendix D sets out per capita convenience goods expenditure by zone. Table 4 at Appendix D multiplies the forecast population by the forecast per capita convenience goods expenditure to provide an estimate of the growth in total convenience goods expenditure available by zone to 2016. The total available convenience goods expenditure within all Zones is anticipated to grow from £64.1m in 2002 to £70.2m in 2016, amounting to a £3.1m (2%) increase over the period 2002 to 2006 a £4.1m (6.3%) change between 2002 and 2011, and a £6.0m (9.4%) change between 2002 and 2016.

5.14 Table 6 at Appendix D sets out shopping patterns relating to convenience outlets and identifies market shares relating to centres and stores in the study area. Table 7 translates the market shares into turnover using the figures on available convenience goods expenditure within each zone from Table 4 and using appropriate expenditure splits between main and top-up shopping calculated using question 4 of the shopping study. From Table 7 it can be seen that stores and centres within the Borough of Melton account for some £51.3m (80%) of the expenditure generated by residents living within the study area, while some £12.4m (20%) of the expenditure is spent at stores and centres located outside the Borough of Melton. The stores within Melton Mowbray itself (both town centre and out-of-centre) account for some £47.4m (74%) of the generated expenditure. Only a very small amount (£0.2m or 0.3%) of the available expenditure is spent on either internet or home delivery.

5.15 Assuming that the convenience retailers within the Borough of Melton are able to retain their current market share up to 2016, Table 8 shows that the resulting expenditure capacity to support new retail floorspace to 2016 amounts to £1.6m by 2006, £3.2m by 2011, and £4.8m by 2016.

Applying an average sales density for new floorspace based on the average sales densities of the five main operators in the UK, yields a floorspace requirement of 179sq m (net) by 2006 rising to 364 sq m (net) by 2011 and 542 sq m (net) by 2016.

5.16 We conclude, therefore, that on a constant market share basis that there is limited quantitative capacity to support new convenience goods floorspace within the Borough of Melton over the period of the Local Plan review.

Expenditure Capacity: Non-Bulky Comparison Goods

5.17 Table 3A at Appendix E assesses comparison goods expenditure growth by zone between 2002 and 2016. Table 3B assesses expenditure per capita by zone on clothes and footwear and Table 3C, assesses other non-bulky comparison goods expenditure per capita by zone. These figures are multiplied by the population forecasts to give estimates of total comparison goods expenditure by zone (Table 5A), total clothes and footwear expenditure by zone (Table 5B) and total other non-bulky comparison goods expenditure by zone (Table 5C). Table 11 A at Appendix D calculates that available non-bulky comparison expenditure within the study area (both clothes and footwear and other non-bulky comparison goods), derived from Tables 5B and 5C and calculates the actual turnover of existing non-bulky comparison goods floorspace within the study area (both clothing and footwear and other non-bulky comparison goods) derived from Tables 9B and 10B, to assess floorspace capacity between 2002 and 2016 assuming no increases in market share and increases or no increases in the floorspace efficiency for existing retail outlets. The assessment leads to an estimate of residual expenditure of £7m by 2006, rising to £17.4m by 2011, further rising to £30.1m by 2016. Using an average sales density for non-bulky comparison floorspace of £3,250 per sq m. this yields a floorspace capacity of 2,163sq m (net) by 2006, 5,351sq m (net) by 2011, rising to 9,271sq m (net) by 2016.

5.18 Table 11B provides an alternative scenario whereby it is assumed that existing floorspace within the Borough increases its floorspace efficiency by 1% per annum over the period assessed ie at a rate 2.9% below the rate of growth in per capita expenditure on non-bulky comparison goods. The resulting floorspace capacity to 2006 would, under this scenario, be around 1,717sq m (net) rising to 4,440sq m (net) in 2011. By 2016 there will be sufficient residual expenditure to support a floorspace capacity of 7,877sq m (net).

5.19 Table 11C describes a further scenario involving a change in the assumptions regarding market share but with no changes to floorspace efficiency. This scenario assumes a 5% increase in market share over the period assessed and this approach leads to an increase in the assessed level of residual expenditure available to support new floorspace, giving rise to a floorspace capacity of 3,637sq m (net) by 2006, 7,182sq m (net) by 2011, and 11,541sq m net (net) by 2016.

5.20 Of the three scenarios we conclude that A and B (Table 11A and 11B) are the most appropriate to adopt for the purposes of seeking allocation for new retail development and assessing proposals for new retail development over the Plan period. Both scenarios assume no increase in market share and either no increase or small increases in floorspace efficiency over the period to 2016. Scenario C (Table 11C) is dependent upon significant retailer investment and additional floorspace but not necessarily unlikely. In order for Melton Borough to increase its market share the Borough would need to provide more attractive modern shop units so it can compete with other nearby stronger centres (Leicester and Nottingham) and to attract further interest of retailers. Additionally surrounding competitor towns will also seek over time to widen and enhance the retail offer available within their shopping catchment area. We therefore conclude that the existing level of market share (44.6%) is more likely to remain constant over the period assessed, so by 2006 there will be sufficient residual expenditure to support floorspace capacity between 1,717-2,163sq m (net), increasing to 4,440-5,351sq m (net) by 2011, increasing further to 7,877-9,271sqm (net) by 2016. In summary, Figure 12 below shows the floorspace capacity in relation to each scenario.

Figure 12: Non-Bulky Comparison Goods Floorspace Capacity – Melton Borough

Scenario	**Floorspace capacity (sq m net)**		
	2006	**2011**	**2016**
Scenario A - No increase in market share No increase in floorspace efficiency	2,163	5,351	9,271
Scenario B - No increase in market share 1% increase in floorspace efficiency	1,717	4,440	7,877
Scenario C – 5% increase in market share No increase in floorspace efficiency	3,637	7,182	11,541

Source: Appendix D – Tables 13A, 13B, & 13C

Expenditure Capacity: Bulky Comparison Goods

5.21 In Table 13A, the floorspace capacity for bulky goods over the Plan period is set out. The Table amalgamates the expenditure availability and turnover of existing retail outlets for all of the three bulky goods categories assessed in Tables 12A to F. Table 13A assesses the floorspace capacity on the basis of no increases in market share and no increases in floorspace efficiency.

5.22 Table 13A shows that on the basis of existing bulky comparison retail outlets retaining the market share of 44.4% within the study area, the residual expenditure likely to be available by 2006 to support new retail floorspace will be £2.9m, rising to £7.2m by 2011, rising further to £12.4m by 2016. Using an average sales density for new bulky comparison floorspace of £2,875 per sq m, this gives rise to a floorspace capacity for bulky goods of 1008sq m (net) by 2006, 2,494sq m (net) by 2011 and 4,321sq m (net) by 2016.

5.23 Tables 13B and 13C present alternative scenarios of quantitative capacity for bulky comparison goods based on changes in the assumptions used. In Table 13B an assumption is made that floorspace efficiency in existing shops will increase by 1% per annum over the period assessed. This means that there would be 800sq m (net) of floorspace capacity by 2006, increasing to 2,014sq m (net) by 2011, further increasing to 3,556sq m (net) by 2016.

5.24 In Table 13C, an assumption is made that facilities in the study area achieve an increase in their market share of 5% over the period assessed. This gives rise to a larger floorspace capacity of 2,262sq m (net) by 2006, 4,052sq m (net) by 2011 and 6,252sq m (net) by 2016. Below is a table summarising the floorspace capacity relating to the three scenarios (Table 13A, 13B & 13C).

Figure 13: Bulky Comparison Goods Floorspace Capacity – Melton Borough

Scenario	Floorspace capacity (sq m net)		
	2006	2011	2016
Scenario A - No increase in market share No increase in floorspace efficiency	1,008	2,494	4,321
Scenario B - No increase in market share 1% increase in floorspace efficiency	800	2,014	3,556
Scenario C – 5% increase in market share No increase in floorspace efficiency	2,262	4,052	6,252

Source: Appendix D – Tables 15A, 15B, & 15C

5.25 For the purposes of meeting needs within the Local Plan period, in the case of bulky goods, we take the view that the existing market share of 44.4% is likely to increase (between 1 and 5%) while floorspace efficiency is likely to remain constant. For example, since there are no electrical, carpets or furniture warehouses in Melton Mowbray, there is considered to be clear potential for a small percentage increase in the town's market share. However, we do not believe that there is sound evidence to support an assumption regarding general increases in floorspace efficiency over the period assessed.

Methodology for Assessing Qualitative Need

5.26 In respect of qualitative need we have adopted the following approach:

- We have used the results of the household shoppers' survey to identify levels of expenditure leakage relating to various goods types to stores and centres located outside the Borough of Melton;

- We have used relevant information derived from the health check audit of the various centres within Melton Borough to assess the quality and range of retailing available to the population in the Borough; and

- We have analysed the extent and nature of the expressed requirements for new retail floorspace from retailers themselves, using the Focus Database.

Qualitative Need for New Convenience Goods Floorspace

5.27 In the central, eastern, western and southern parts of the Borough (Zones 1, 2, 3 and 5 of the household shoppers' survey) the majority of the population rely, for their main food shopping, on two superstores – the Tesco store and Safeway store in Melton Mowbray. Both of these stores according to the results of the household shoppers' survey are trading strongly. Both stores provide a wide range of in-store facilities and their general physical condition and shopping environment is good. The out-of-centre Tesco store achieves a higher market share than the Safeway store in all the four zones. In addition, Melton Mowbray benefits from a Co-op foodstore, Kwik Save foodstore and Iceland frozen foodstore. Approximately 13% of respondents in the overall study area visit these stores for their main food shop.

5.28 Within the northern part of the Borough (Zones 4 and 6) the household shopping survey identifies significant leakage of main food expenditure generated by residents living in those zones, to locations outside the Borough, primarily to stores located in Grantham and Nottingham. Owing to the proximity of Grantham and Nottingham, and the pattern of the road network within and outside the Borough boundary it is unlikely that the Borough will be able to capture, to any significant extent, the expenditure which is leaking from these zones by introducing additional convenience floorspace in Melton Mowbray.

5.29 We conclude that the quality and range of food provision in Melton Mowbray is good and there is no overriding qualitative need for an additional foodstore in the Borough.

Qualitative Need for Comparison Goods Floorspace

5.30 Based on our detailed observation of Melton Mowbray town centre, and taking into account its respective roles in the local and sub-regional shopping hierarchy, we conclude that the town centre is noticeably deficient in terms of its range and quality of non-food shopping provision.

5.31 In the non-bulky goods sector the household shoppers' survey identifies that a high proportion of expenditure generated by residents in the survey leaks to centres outside the Borough. In relation to individual zones, the majority of residents in every zone shop outside Melton Borough for clothes and footwear shopping. Detailed analysis of the retail composition of the town centre, supported by the survey results illustrates that Melton town centre lacks a range of both multiple and independent retailers selling non-bulky goods.

5.32 In terms of the bulky goods sector it is noticeable from the household shoppers' survey results that there is significant leakage of expenditure in respect of all three product groupings (Electrical, DIY/Hardware and Furniture and Floor coverings) from all zones to stores outside the Borough. According to the Experian Goad Centre Summary Report for the town centre, the town has relatively poor provision in DIY/Hardware and Furniture/Carpet floorspace compared to the index of all UK centres. In addition, there are no retail warehouses offering electrical, carpets and furniture goods in the Borough.

5.33 We conclude that the quality and range of non-bulky and bulky comparison goods provision in Melton Mowbray town centre is limited and capable of improvement. In addition we conclude that there is a qualitative need for additional bulky comparison goods floorspace.

Focus Derived Retailer Floorspace Requirements

5.34 In order to identify current levels of retailer floorspace requirements we use the Focus database, which is a nationally recognised source of information based on regular contact with over 800 leading UK retailers (and retail service providers) and contains a list of over 15,000 UK property/site requirements at any given time. The Focus database identifies that there are fourteen retailers and businesses with a potential requirement for representation in Melton Mowbray. This includes eight comparison retailers, four convenience retailers and one service retailer. There is no recorded requirement for any type of retail warehousing, nor particularly from retailers within the electrical, carpets and furniture and DIY sector retailers. The retailers' requirements are listed in Figure 14 below.

5.35 Figure 14 shows that the total potential retailer floorspace requirement in Melton Mowbray at 2002 is between 3,362 - 5,885sq m (excluding Aldi). The total potential retail floorspace requirement for a prime pitch/high street, in-town shopping centre, and good secondary/fringe prime location is between 3,292-4,485sq m. In terms of out-of-town shopping centres and edge of town locations, the total potential retail floorspace requirement is between 1,180-1,770sq m.

Figure 14: Melton Mowbray - Retailers Requirements

Retailer	Type of Retailer	Location	Size (sq m)
Aldi	Convenience	prominent/busy main road, edge of town, established retail park	Nk
Bon Marche	Comparison	good secondary/fringe prime	230-325
Capitals Fashion	Comparison	good secondary/fringe prime	110-190
Card Warehouse	Comparison	in-town shopping centre, good secondary/fringe prime	95-230
Cassandra's	Convenience	prime pitch/high street, good secondary/fringe prime	130-170
Farmfoods Ltd	Convenience	prime pitch/high street, in-town shopping centre, good secondary/fringe prime, edge of town, prominent/busy main road	280-370
Gift Tree	Comparison	prime pitch/high street, in-town shopping centre, out-of-town shopping centre, good secondary/fringe prime	900-1,400
Holland & Barrett Ltd	Convenience	prime pitch/high street, good secondary/fringe prime	95-140
Peacock's Stores Ltd	Comparison	prime pitch/high street, in-town shopping centre, good secondary/fringe prime, prominent/busy main road	460-1,400
Phones 4U Ltd	Comparison	prime pitch/high street	70-140
Pizza Express	Service	good secondary/fringe prime	140-190
Specsavers Optical	Comparison	prime pitch/high street, good secondary/fringe prime	102-130
Yeomans	Comparison	good secondary/fringe prime	750-1,200
		TOTAL	**3,362-5,885**

Source: Focus Database, November 2002

6 ASSESSMENT OF POTENTIAL SITES TO MEET IDENTIFIED NEEDS

Introduction

6.01 Government guidance contained in PPG6 states that "*in drawing up their development plans, local planning authorities should, after considering the need for new development, adopt a sequential approach to selecting sites for new retail development*". This section of the report considers how best to plan for new retail provision in Melton Borough, in light of such guidance.

Need

6.02 The brief for this study requires an assessment of the need for new retail development in Melton Mowbray over the period to 2016 in order to inform the decisions over the size and location of retail allocations in the forthcoming local plan, and to provide valuable information in determining possible retail planning applications in the future. Based on the analysis contained in the previous sections of this report, the need for retail provision in the three identified sectors – convenience, non-bulky comparison and bulky comparison, is considered below.

Convenience Retail Provision

6.03 In the previous section the quantitative assessment identified only very limited convenience expenditure potential (542sq m net by 2016). This level of capacity does not warrant allocating sites for convenience retail particularly as the qualitative assessment has concluded that existing stores in Melton Mowbray adequately meet the needs of residents.

Non-Bulky Comparison Retail Provision

6.04 Section 5 identifies that there is both a quantitative and qualitative need for non-bulky comparison retail floorspace. On the assumption that Melton Borough would not achieve an increase in its market share of non-bulky goods provision and either no increase or a small increase in floorspace efficiency there would be capacity to support between 4,440-5,351sq m (net) by 2011, increasing to between 7,877-9,271sq m (net) by 2016.

Bulky Comparison Retail Provision

6.05 Section 5 also identifies a qualitative and quantitative need for bulky comparison goods retail floorspace. Following detailed observations it can be concluded that Melton Mowbray town centre lacks a range of both multiple and independent retailers selling bulky goods. On the assumption that the market share of Melton Mowbray town centre increases somewhere between 0 and 5%, and that there is no increase in floorspace efficiency, there would be capacity to support between 2,494-4,052sq m (net) of bulky comparison floorspace by 2011, increasing to 4,321-6,252sq m (net) by 2016.

The Sequential Approach to Site Selection

6.06 Paragraphs 1.3-1.7 of PPG6 outline the sequential approach to be adopted in identifying sites for development. This approach gives first preference to town centre sites, where suitable sites or buildings for conversion are available, followed by edge-of-centre sites, district and local centres, and only then out-of-centre sites that are accessible by a choice and means of transport (paragraph 1.11)

6.07 In carrying out a sequential test, each site must be considered in terms of its:

- suitability for the proposed development;
- viability for the proposed use; and
- likelihood of becoming available within a reasonable period of time.

6.08 On this basis, we set out below our assessment of potential sites for the types of retail development where an element of need has been identified, ie. non-bulky and bulky comparison goods retailing. The potential sites have been identified having regard to the retail allocations in the adopted local plan and sites identified in discussions with Melton Borough planning officers. The potential sites are:

i) Town Station Site, Burton Street
ii) Cattle Market, Scalford Road
iii) Wilton Road Site

Plans showing the location and extent of each site are contained at **Appendix J**, and each site is considered in turn below.

Town Station Site, Burton Street, Melton Mowbray

6.09 The Town Station site extends to approximately 1.6ha and at present the majority of the site encompasses a large public car park. In addition, the site contains a vacant warehouse (plus associated land), a vacant car garage and a number of other retailers selling timber, car tyres, and second hand electrical goods.

6.10 At present, the site is used primarily for town centre car parking, providing some 248 spaces, the largest town centre car park in Melton. It has a strong functional relationship with other town centre activities and is well related to existing retail and commercial uses. The site is located approximately 150 metres walking distance from the primary shopping frontage past existing retail shops and other commercial premises. There are no physical barriers on the pedestrian route between the site and the main shopping streets and the site abuts existing active street frontage. The site is also located along an important pedestrian route linking the railway station with the main shopping streets and situated within the town centre boundary as defined in the Melton health checks (even though the boundary has no statutory significance). In addition the subject site is allocated in the adopted local plan for retail development under Policy S1.

6.11 For the reasons set out above this site represents a good opportunity to improve the retail offer and we recommend that the site is maintained as a retail allocation in the forthcoming local plan.

Cattle Market Site, Scalford Road, Melton Mowbray

6.12 The cattle market site extends to around 7ha and is located to the north of the town centre, approximately 160m walking distance from the primary shopping frontage. The site encompasses various buildings and sheds as well as a large tarmac area currently used for the market stalls and associated lorry/car parking. The site is relatively flat with a gradual slope running from west to east. In addition to its use as a cattle market, the site accommodates a farmers' market and, therefore, already functions as part of the retail offer of Melton Mowbray.

6.13 Despite being in an edge-of-centre location, pedestrian linkage with the town centre is somewhat constrained by Park Road/Norman Way which is a heavily trafficked through route on the northern edge of the town centre.

6.14 The site is unallocated in the adopted Local Plan. It does, however, represent a potential opportunity for retail development. If it were to be considered for retail development, it would be necessary to give careful consideration to the improvement of pedestrian linkage between the site and the town centre.

Wilton Road Site, Melton Mowbray

6.15 The Wilton Road site is located to the north west of Melton Mowbray town centre approximately 170m walking distance from the primary shopping frontage. It is positioned on the western side of Wilton Road and to the south of Asfordby Road. The site extends to around 2ha and currently consists of the Melton Mowbray College of Further Education, the town's Library, the bus station and a public car park.

6.16 The site is separated from the town centre by the heavily trafficked Wilton Road. It does, however, have the advantage of highly convenient accessibility by public transport since it includes the town centre bus station.

6.17 The site represents a potential opportunity for retail development. Any development proposals would need to give careful consideration to pedestrian linkage with the town centre.

Summary

6.18 In light of the assessment of need for additional retail floorspace and the assessment of potential development sites in relation to the sequential approach to site selection, we conclude that:

- there is demonstrable need for additional retail development which would justify the allocation of one or more sites for retail development in the Local Plan;

- there is a number of key sites on the edge of Melton Mowbray town centre which are potentially suitable for accommodating a variety of different forms of retail development.

6.19 We recommend that the Town Station site be maintained as a retail allocation. The site has a strong functional relationship with other town centre activities and is well related to existing retail and commercial uses. The Cattle Market and Wilton Road sites are each potentially suitable for new retail development. Each, however, contains important operational uses and each is separated from the town centre by heavily trafficked roads. Accordingly, we do not recommend that these sites are allocated for retail development. Consequently should any retail proposals come forward on these sites, it will be necessary for the applicants to demonstrate the need for such development and that the three criteria of suitability, viability and availability are satisfied.

7 SUMMARY AND RECOMMENDATIONS

7.01 White Young Green Planning were instructed by Melton Borough Council to carry out a shopping study of Melton Borough in May 2002. The aim of the study is to provide a framework for the preparation of appropriate retail policies in connection with the current review of the Local Plan.

7.02 The study outputs reflect the results of the telephone based shoppers' survey of 750 households located within Melton Borough. Additional data which informs the study results has been gleaned from Experian Goad, White Young Green Planning centre surveys, MapInfo, Valuation Office Property Market reports, Focus Database of retailer requirements and Local Authority data.

7.03 Melton Mowbray is an important and popular shopping destination serving the majority of the Borough. However, competing centres including Leicester, Nottingham, Grantham and Loughborough, with better retail provision, are located reasonably close to the Borough boundary, effectively limiting the catchment area from which Melton Mowbray can expect to draw retail expenditure.

Key Findings

7.04 From our audit of Melton Mowbray Town Centre's current state of health, we conclude that the town centre displays relatively high levels of vitality and viability, evidenced by the following:

- A wide range of uses;
- A declining number of vacant units, with no significant run of dead frontage;
- Reasonably high levels of pedestrian activity within the town centre, particularly on market days;
- Attractive environmental quality; and
- Positive feedback from customers regarding the health of the town centre.

However, there is only a limited range of non-food national multiples, current town centre shopping rents are low and the town centre is relatively weak compared to surrounding town/city centres.

7.05 The study brief requested consideration of the existing boundary of the town centre and the primary and secondary shopping frontages. In light of a survey of the town centre we recommend no change to the primary and secondary shopping frontages that are currently defined.

7.06 We have also reviewed the vitality and viability of the two larger village centres in the Borough in relation to PPG6 Figure 1 indicators (where available and relevant) and conclude that:

- Asfordby is a reasonably healthy village centre. The village remains virtually free of vacancies and plays an important role in serving its local population.

- Bottesford village centre displays high levels of vitality and viability. It has an attractive centre, contains a mix of uses and only one vacant unit. The village centre is well used by local residents.

7.07 Retail provision in the smaller village centres has declined slightly since 1996. However, the current retail offer still provides an important local service catering for day-to-day needs.

Summary of Shopping Patterns Associated with Melton's Residents

7.08 The household shoppers' survey sub-divided the Borough into zones determined on the basis of postcode geography. The results of the survey in terms of shopping patterns can be summarised as follows:

A) <u>In Respect of Food Shopping</u>

- Overall, in the central, southern, eastern, and western parts of the borough (Zones 1, 2, 3 and 5) there is a relatively high level of expenditure retention within Melton Borough. However in the northern part of the borough (Zone 4 and 6) there is a significant leakage of expenditure to food stores located outside the Borough. The main food shopping destinations, in terms of their use by survey respondents from the study area, are as follows:

  - Tesco, Melton Mowbray (42%)
  - Safeway, Melton Mowbray (22%)
  - Asda, Grantham (7%)
  - Co-op, Melton Mowbray (6%)
  - Morrisons, Grantham (5%)
  - Kwik Save, Melton Mowbray (5%)

B) <u>In Respect of Clothes and Footwear Shopping</u>

- The household shopping survey indicates that significant levels of clothes and footwear expenditure ‘leaks’ to shopping destinations outside the Borough. Leicester city centre is the most popular destination for clothes and shoe shopping amongst residents of the Borough. Melton Mowbray attracts only 27% of residents who live within the Borough.

C) <u>In Respect of Other Non-Bulky Comparison Goods Shopping</u>

- Melton Mowbray town centre is the main destination for residents living in the central, eastern, western and southern areas (Zones 1, 2, 3 and 5) of the Borough. Significant levels of other non-bulky comparison goods expenditure ‘leaks’ from the northern part (Zones 4 and 6) of the Borough to shopping destinations outside the Borough, particularly Grantham.

D) <u>In Respect of Bulky Comparison Goods Shopping</u>

- There is evidence of significant expenditure leakage from Melton Borough to shopping destinations outside the Borough for this type of shopping. The following can be summarised:

  - **Electrical Goods** – Reasonably high levels of expenditure retention in the central, southern, western and eastern parts (Zones 1, 2, 3 and 5) of the Borough. High levels of expenditure leakage from the northern part (Zone 4 and 6) of the Borough.

  - **Furniture and Carpets** – High levels of expenditure leakage to shopping destinations outside the borough, except from the central part of the Borough (Zone 1).

  - **DIY Goods** – Majority of residents living in the central, southern, western and eastern parts (Zones 1, 2, 3 and 5) of the Borough visit Melton Mowbray town centre. A High proportion of residents living in the northern part (Zone 4 and 6) of the Borough shop outside the Borough for DIY goods indicating a significant amount of expenditure leakage.

Assessment of the Need for New Retail Floorspace in the Borough to the Period 2016

The Need for Convenience Goods Floorspace

7.09 Our assessment of the need for new convenience goods floorspace within the Borough leads us to conclude that:

- There is very small quantitative capacity for new convenience goods floorspace in the Borough to 2016 (542sq m net by 2016).

- There is no qualitative need for a new high quality foodstore in Melton Borough.

The Need for (Non-Bulky) Comparison Goods Floorspace

7.10 We have assessed several alternative scenarios relating to the quantitative requirement for new (non-bulky) comparison goods floorspace, which results in the following range of floorspace capacity figures.

Non-bulky Comparison Goods

Scenario	Floorspace capacity (sq m net)		
	2006	**2011**	**2016**
Scenario A - No increase in market share No increase in floorspace efficiency	2,163	5,351	9,271
Scenario B - No increase in market share 1% increase in floorspace efficiency	1,717	4,440	7,877
Scenario C – 5% increase in market share No increase in floorspace efficiency	3,637	7,182	11,541

7.11 On the basis that Melton Mowbray would not achieve an increase in its market share of non-bulky goods provision and either a small increase or no increase in its floorspace efficiency we recommend that the floorspace capacity figures which should be used in the Local Plan are those summarised at Scenario A and B. Under the two Scenarios we assess that there is quantitative capacity for further non-bulky comparison goods floorspace of 1,717-2,163sq m (net) in 2006, rising to 7,877-9,271sq m (net) in 2016.

7.12 Further to the results of the household shoppers' survey and our review of the various centres in the Borough, we conclude that there is also a qualitative need for new non-bulky comparison floorspace in the Borough to 2016.

Need for New Bulky Comparison Goods Floorspace

7.13 We have analysed a number of scenarios relating to the quantitative capacity for further bulky goods floorspace provision within the town centre to 2016. The scenarios produce the following range of floorspace capacity figures:

Bulky Comparison Goods

Scenario	Floorspace capacity (sq m net)		
	2006	**2011**	**2016**
Scenario A - No increase in market share No increase in floorspace efficiency	1,008	2,494	4,321
Scenario B - No increase in market share 1% increase in floorspace efficiency	800	2,014	3,556
Scenario C – 5% increase in market share No increase in floorspace efficiency	2,262	4,052	6,252

7.14 We recommend that either Scenarios A and C be adopted. The scenarios are based on the assumption that the overall market share of bulky comparison goods floorspace within the Borough increases somewhere between 0 and 5%, and that there is no increase in floorspace efficiency. On that basis, we assess that there is floorspace capacity for between 1,008-2,262sq m (net) of bulky comparison floorspace by 2006, increasing to 4,321-6,252sq m (net) by 2016.

7.15 Following detailed observations of bulky comparison goods retail provision in the Borough and an analysis of the household shopper's survey it can be concluded that the Borough lacks a range of both multiple and independent retailers selling bulky goods.

Assessment of Potential Sites to Meet Identified Needs

7.16 In light of the identified need for non-bulky and bulky comparison goods floorspace over the plan period to 2016, a number of sites have been identified as potentially suitable for accommodating retail development:

- **Town Station Site, Melton Mowbray –** This 1.6ha site has been allocated for retail development in the adopted local plan. We recommend that the site is maintained as a retail allocation in the forthcoming local plan.

- **Cattle Market Site, Melton Mowbray –** The cattle market site represents a potential opportunity for retail development. If it were to be considered for retail development, it would be necessary to give careful consideration to the improvement of pedestrian linkage between the site and the town centre.

- **Wilton Road, Melton Mowbray** – This site represents a possible opportunity for retail development. However careful consideration would need to be given to pedestrian links with the town centre.

7.17 We recommend that the Town Station site be maintained as a retail allocation. The Cattle Market and Wilton Road sites are each potentially suitable for new retail development. Each, however, contains important operational uses and each is separated from the town centre by heavily trafficked roads. Accordingly, we do not recommend that these sites are allocated for retail development. Consequently, should any retail proposals come forward on these sites, it will be necessary for the applicants to demonstrate the need for such development and that the three criteria of suitability, viability and availability are satisfied.