



Planning Communities Executive Advisory Panel

Wednesday 17th July 2024

Agenda Item 4

North Northamptonshire Local Plan Review

Appendix D(i) – Retail Capacity Study Update – April 2024

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North Northamptonshire Retail Capacity Update

Final Report

ON BEHALF OF NORTH NORTHAMPTONSHIRE COUNCIL

April 2024

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1. Introduction

Instruction and Purpose

- 1.1 Nexus Planning has been instructed by North Northamptonshire Council (hereafter referred to as 'the Council') to prepare a new Retail Capacity Update for the authority area. The primary focus of the Study is to establish the current position in respect of the need for additional retail and leisure facilities in North Northamptonshire, and to consider the vitality and viability of the authority's principal defined centres.
- 1.2 This Study replaces the previous North Northamptonshire Retail Capacity Update 2014 Update, which was undertaken by Peter Brett Associates, and in respect of the healthcheck assessments of the authority's Town Centres, the findings of the North Northamptonshire Retail Capacity Update (2011), which was also undertaken by Peter Brett Associates. The principal purpose of the commission is to inform work on updating the Joint Core Strategy through a Plan which is currently referred to as the North Northamptonshire Local Plan, and to assist in the determination of future planning applications for retail and other main Town Centre uses.
- 1.3 The Study is underpinned by new empirical evidence in the form of a new household shopper survey, stakeholder consultation, and our site visits to survey and assess the health of the principal centres. The household survey was undertaken by NEMS Market Research in November 2022 and covers 11 separate zones, which are collectively considered representative of the principal catchment area for retail facilities within North Northamptonshire. The zones have been developed with reference to those utilised in the previous 2014 and 2011 Studies.
- 1.4 As part of this Study, AspinallVerdi have undertaken a property market assessment to understand the current supply and demand characteristics of the centres in North Northamptonshire. This includes a review of retail, leisure, food and drink, employment, cultural, community (including education and health), and residential sectors. This report also identifies the potential drivers of investment and the change required for centres to fulfil their potential. The market analysis will help to identify the potential for a range of different uses and establish how the centres can diversify and become more flexible to meet changing needs. Finally, AspinallVerdi's input will focus around the commercial market and the viability of interventions that can materially improve the offer of the Town Centres. We refer to this report at Section 9 of this Study.
- 1.5 A plan of the Study Area is provided at Appendix A, and the tabulated household survey results are provided at Appendix B. Whilst the Study Area largely corresponds with the boundaries of the North Northamptonshire authority area, it does include small parts of neighbouring authority areas such as West Northamptonshire, Bedford and Harborough, where residents sometimes look to facilities in North Northamptonshire to meet at least some of their retail and leisure needs.

Structure of Report

- 1.6 Our report firstly provides an overview of prevailing retail and leisure trends, before then going on to consider the planning policy context for the Study. We then consider the vitality and viability of defined centres within the authority areas. We then review the shopping patterns established by the household survey before setting out our assessment of retail needs, before summarising the Property Market Report prepared by AspinallVerdi.
- 1.7 Accordingly, our report is structured as follows:
 - Section 2 sets out key retail and leisure trends of relevance to the commission;
 - Section 3 provides an overview of the planning policy context;
 - Section 4 summarises our assessment of the vitality and viability of the defined centres;
 - Section 5 provides an overview of forecast changes in Study Area population and expenditure;

Section 6 summarises the findings of the household survey;
Section 7 sets out an updated assessment of retail needs;
Section 8 sets out an updated assessment of leisure needs;
Section 9 summarises the Property Market Report prepared by AspinallVerdi; and
Section 10 provides a summary of our key findings and conclusions.

2. Current and Emerging Retail and Leisure Trends

- 2.1 In order to provide a context for this Study and help identify the sectors that are more likely to be the subject of additional development proposals, we provide an overview of current retail and leisure trends below. In reading the below review, it should be noted that the retail and leisure sectors are dynamic and, whilst online shopping has impacted on the retail sector, new retailers and formats continue to evolve to meet shoppers' needs.
- 2.2 The below commentary should therefore be taken as a 'snapshot' in respect of current market conditions; it will be necessary to judge future development proposals for main Town Centre uses with reference to the prevailing conditions at the time of a proposal's determination. Trading conditions continue to be impacted by the Covid-19 pandemic, albeit greater confidence is now returning to the retail and leisure sectors. We reflect further on the impact of the pandemic below.

Economic Conditions

- 2.3 The UK economy has clearly been substantially impacted over recent years by the Covid-19 pandemic, and subsequent restrictions on movement and behaviour which have sought to mitigate its impact. This uncertain background caused business investment and expenditure to decline. Household spending fell by over 20% quarter-on-quarter in the second quarter of 2020 following the imposition of national lockdown measures. This is the largest quarterly contraction on record. Retail sales volumes also suffered double-digit falls in April 2020 as all but essential stores closed during the height of the lockdown.
- 2.4 However, as a result of the gradual reopening of businesses over summer 2020, the economy returned to growth, with this gathering momentum as a greater number of sectors reopened, including hospitality and leisure services followed by the full reopening of schools. A more pronounced resurgence in the number of cases of Covid-19 resulted in the Government reinstating a nationwide lockdown in early 2021. The outlook continues to be of concern at the time of reporting given the inflation rate and substantial increases in the general cost of living.
- 2.5 In February 2023, Experian published its Retail Planner Briefing Note 20 ('ERPBN20'), which identifies anticipated future growth in the retail and leisure sectors and considers likely changes in bricks and mortar retail floorspace and online sales.
- 2.6 ERPBN20 anticipates that retail spending has been squeezed in 2022 and 2023 as a consequence of inflationary pressure and increases in the cost of living. Page 5 of ERPBN20 provides the following summary of the short-term economic outlook:
- 'Pay is expected to grow strongly given a tight labour market, though will fail to keep pace with inflation, underpinning a decline in real personal disposable incomes and a curbing of consumer spending. Further out real incomes will recover as inflation subsides, however the rebound in spending is mild given unfavourable demographics and a rising tax burden on households.'**
- 2.7 Overall retail sales are therefore forecast to reduce in the very short term, with growth returning over the medium and longer term. The Covid-19 pandemic has accelerated the shift to online retailing with a consequent reduction in bricks and mortar retail floorspace. As a consequence, the proportion of expenditure committed via special forms of trading (i.e. internet and mail order sales) has increased.
- 2.8 More generally, as a result of relatively modest growth forecasts and the shift to online retailing, Experian forecasts that there will be a reduction in the stock of retail floorspace over the next few years.

- 2.9 In terms of inflation, Office for National Statistics data¹ indicates that the rate of inflation (as measured by the consumer price index) increased from 0.8% at April 2020 to 1.5% at April 2021, before then increasing significantly to 9.0% at April 2022. The rate of inflation appears to have peaked at 11.1% in October 2022 and has reduced significantly to 6.7% at August 2023. Retail has been an industry under significant stress, as many retailers find themselves squeezed between rising costs and the increasing volume of sales over the internet. Such difficulties have, of course, been exacerbated by the Covid-19 pandemic and the cost of living crisis associated with rising energy prices and inflation.
- 2.10 There will still be the need and demand for physical stores, despite the increase in shopping online. This is particularly the case for convenience goods sales given that online shopping orders are typically picked from the shelves of physical stores. In respect of comparison goods, there is a need for the offer to become more 'experiential' to encourage shoppers onto the high street, and to ensure that shopping is viewed as a pleasurable pastime. A more experiential retail offer will be focused around: improved store design (which will encourage both operators and shoppers to post on social media), the use of shops to host events: the creation of a 'community' around strong brands or niche retail offers; and the prioritisation of customer engagement over the need to secure a sale on the day of visit.
- 2.11 The shopping experience needs to evolve and diversify both to attract footfall and convert increased activity into sales. Independents clearly have an important role to play in adding interest and in providing differentiation between shopping venues.
- 2.12 In considering the current strength of the retail and leisure sectors, it is important to recognise that different types of retailer have been the subject of different fortunes.
- 2.13 Non-essential retailers have been impacted by enforced 'lockdown' closures in 2020 and 2021. However, dispensing chemists traded more strongly from March 2020, and their sales continued to be above pre-pandemic levels into 2022 and early 2023. Foodstores also generally traded consistently above their pre-pandemic levels. This was initially due to a degree of stockpiling of grocery goods, but some ongoing boost in sales was evident due to the ongoing prevalence of working from home. Furniture and homeware retailers also generally benefitted from people spending more time in their homes and wanting to improve their own environment. However, in light of increasing inflation and changes to working patterns throughout 2022, it is understood that there has now been a shift away from this pattern.²

Available Expenditure and the Impact of the Internet

- 2.14 Experian expenditure data and growth forecasts confirm that the pandemic has resulted in fairly turbulent short term growth in per capita convenience and comparison goods expenditure. In this regard, Experian Retail Planner Briefing Note 20 ('ERPBN20') identifies that per capita convenience goods expenditure growth in the convenience goods sector will decrease slightly in 2023 by 2.4%. This follows a 1.4% convenience goods expenditure contraction in 2021, followed by another contraction of 6.7% in 2022. This decrease is forecast to continue until 2024; from 2025 onwards, Experian forecasts growth again, although very limited.
- 2.15 As the below Table 2.15.1 indicates, forecast increases in per capita comparison goods spending are more optimistic. However, forecast per capita comparison goods expenditure increases going forward are still below the level apparent at the turn of the millennium. Experian identifies that per capita comparison goods expenditure dropped by 6.8% in 2020, although grew again by 6.7% in 2021. Experian forecasts that it will remain between 2.5% to 3.0% per annum in the medium to long term.

¹ ONS 'Consumer price inflation tables' dataset, July 2023.

² Article headlined 'Retail sales in Great Britain rise despite cost of living crisis', The Guardian, 19 August 2022.

Table 2.15.1 Experian's Identified and Forecast Convenience and Comparison Goods Per Capita Expenditure Growth

Volume Growth per Head (%)	2018	2019	2020	2021	2022	2023	2024	2025-29	2030-40
Convenience goods	0.1	0.2	10.2	-1.4	-6.7	-2.4	-0.4	0.1	0.2
Comparison goods	0.7	2.5	-6.8	6.7	-0.4	-1.6	0.3	2.5	3.0

Source: Figure 1a and Figure 1b of Experian Retail Planner Briefing Note 20

- 2.16 Whilst the above figures relate to a level of growth which is significantly below that which has historically been available to retailers, the situation for high street stores is exacerbated through the increasing amount of expenditure which is committed through special forms of trading³ and, in particular, online.
- 2.17 In this regard, Figure 5 of ERPBN20 indicates that special forms of trading accounted for 29.6% of total retail sales at 2022, which is a slight drop from 30.7% in 2021. In the medium to long term, Experian believes that special forms of trading will reach over 35% of retail sales by 2031.
- 2.18 The below Table 2.18.1 sets out Experian's identified and forecast level of special forms of trading as a proportion of overall convenience and comparison goods expenditure. Experian estimates that special forms of trading will account for nearly four out of every ten pounds spent on comparison goods and just over a quarter of convenience goods expenditure at 2038.

Table 2.18.1 Experian's Identified and Forecast Market Share of Non-Store Retail Sales for Convenience and Comparison Goods Sectors

Volume Growth Per Head (%)	2018	2019	2020	2021	2022	2023	2028	2033	2038
Convenience goods	10.9	12.8	16.6	19.3	19.4	18.6	22.5	24.4	25.5
Comparison goods	21.4	24.5	37.6	38.3	36.0	35.4	39.5	41.5	42.7

Source: Figure 5 of Experian Retail Planner Briefing Note 20

- 2.19 The ongoing popularity of internet shopping continues to have clear implications in respect of the viability of some 'bricks and mortar' retailers. However, it is important to note that changes in how people shop also bring about some opportunities for retailers trading from the high street. In particular, many stores sell online but fulfil orders from regular stores rather than warehouses⁴, with purchases therefore helping to sustain tangible retail floorspace. As a consequence, Experian also provides an 'adjusted' estimate of special forms of trading, which relates to expenditure which is not available to actual stores.

Convenience Goods

- 2.20 Recent socio-economic conditions have led to significant shifts in convenience goods retailing, which have resulted in the 'big four' supermarket operators' market share being cut. Indeed, recent analysis from Kantar has identified that the traditional 'big four' supermarket operators are no longer such, with Aldi's market share overtaking that of Morrisons over the 12 weeks to 4 September 2022. Over this period, Aldi's market share of 9.3% was ahead of Morrisons' share of 9.1%⁵. Mintel⁶ finds that the decline of the food superstore is well established and that this can be attributed to two matters.
- 2.21 Firstly, people are undertaking food shopping in different ways. More people are living in town and city centres, and are generally purchasing their own home at a later age than was previously the case⁷. Mintel indicates that

³ Including internet sales, mail order, stalls and markets, door-to-door and telephone sales.

⁴ This is particularly the case with food shopping and speciality comparison goods purchases, where retailers often try to tap into a wider market through an online presence.

⁵ Article headlined 'Big four no more': where now for UK grocers as Aldi overtakes Morrisons?', The Guardian, September 2022

⁶ 'UK Retail Rankings', Mintel, April 2018.

⁷ Article headlined 'Average UK first-time buyer is now older than 30, says Halifax', The Guardian, January 2022.

such people are more likely to undertake food shopping on an 'as needs' basis and are more likely to eat out or use takeaways. As such, they are less likely to have need to undertake a 'main food shop'.

- 2.22 Secondly, the current uncertainty in the economy has made discount foodstore operators (namely Aldi and Lidl) a more attractive proposition, and many such stores are thriving given that shoppers are currently having to be 'money savvy'. Discounters have also made efforts to try to compete more directly with the 'big four' supermarket operators, with larger stores, greater ranges of goods, fresh foods and premium products becoming increasingly prevalent. It is clear that the likes of Aldi and Lidl are no longer 'hard discounters' in quite the same way they once were, as they are able to meet a wider range of customers' needs by offering a greater range of premium products.
- 2.23 The move towards the middle ground has allowed discounters to secure market share from both superstores and smaller convenience stores. In addition, we note that discount retailers are often happy to trade alongside more upmarket convenience goods retailers (such as M&S Foodhall) as, collectively, the two stores can meet many food shopping needs). Such retailers are often prepared to secure representation on the same retail park as each other to allow customers to benefit from the collective attraction and comprehensive offer provided by two food retail operators in the same location.
- 2.24 The shifts in the sector are illustrated with reference to changes in retailers' market share in recent years, as shown in Table 2.24.124.1.

Table 2.24.1 Market Share of Convenience Goods Operators

Operator	December 2017	December 2018	December 2019	December 2020	December 2021	December 2022
Tesco	28.1	27.8	27.4	27.3	27.9	27.5
Sainsbury's	16.5	16.1	16.0	15.9	15.7	15.5
Asda	15.3	15.2	14.8	14.3	14.2	14.0
Morrisons	10.8	10.6	10.3	10.4	10.1	9.1
Aldi	6.8	7.4	7.8	7.4	7.7	9.1
Co-op	5.8	5.9	6.1	6.0	5.8	5.6
Lidl	5.0	5.3	5.9	6.1	6.3	7.2
Waitrose	5.2	5.0	5.0	5.0	5.1	4.7
Iceland	2.2	2.2	2.3	2.5	2.4	2.5
Symbols ⁸ & Independent	1.7	1.5	1.6	1.7	1.6	1.4
Other Outlets	1.6	1.7	1.6	1.8	1.8	1.8
Ocado	1.1	1.2	1.3	1.6	1.7	1.7

Source: KANTAR Grocery Market Share. Figures shown are for the final reporting period in each calendar year

- 2.25 The past few years has seen the closure of a number of unprofitable foodstores and the continuation of Aldi and Lidl's expansion programme. Aldi announced in September 2021 that it intends to open another 100 stores in the next two years⁹. Lidl's expansion plans are similarly ambitious as it intends to open a further 220 stores in the period to 2025¹⁰. Whilst the 'big four' remain more cautious in respect of new openings, a limited number of proposals for mid-sized foodstores are currently being promoted by these operators in areas where there is a growing population or an obvious shortfall in existing provision. These stores are typically of a scale that is broadly comparable to that provided by Aldi and Lidl, which allows customers to shop in a convenient and efficient manner.

Comparison Goods

- 2.26 The comparison goods sector is currently being squeezed by a number of factors, the most substantial being the effects of Covid-19 and the efforts to contain it. Other factors include reduced expenditure growth, the ability of

⁸ Symbol retailers are franchises of convenience shops, such as Mace or Spar

⁹ Article headlined 'Aldi to create 2,000 jobs in £1.3bn UK expansion plan', The Guardian, 27 September 2021.

¹⁰ Article headlined 'Lidl to ramp up UK store opening with 1,100 stores by 2025', BBC, 24 November 2021.

internet shopping to plug gaps in retailer representation, increases in the minimum wage, business rates changes and inflation.

- 2.27 Whilst the sector is continually evolving and there are a number of ongoing success stories (including Primark, Zara, Next, Boots and JD Sports), recent headlines have focussed on failing retailers and store closures. High profile retailers that have struggled include Debenhams, which announced the closure of all 124 stores in December 2020¹¹, and the Arcadia Group, which owned Topshop, Topman and Dorothy Perkins. Arcadia Group announced the closure of around 500 stores in February 2021¹². Furthermore, Intu Properties, one of Britain's biggest shopping centre owners, fell into administration in June 2020 after failing to secure an agreement with its creditors¹³. This has continued, with the Centre for Retail Research noting in February 2023 that nearly 15,000 retail sector jobs have been lost since the start of the year¹⁴.
- 2.28 Whilst the loss of some of the above names will have significant repercussions for certain towns (particularly those that lose one or more of Debenhams, Marks & Spencer or House of Fraser from their high street), some well-known retailers have failed to 'move with the times' and update their offer, accommodation and online presence. This is partly a consequence of retailers struggling to reinvest in their business when margins are tight (or non-existent).
- 2.29 Many operators have also rationalised their portfolio with the aim of serving the UK by concentrating on larger centres supplemented by a strong online presence. It will be interesting to see whether any permanent change in respect of working from home may act to counterbalance this 'polarisation' trend, given the prospect of fewer commuters travelling to larger centres and greater numbers of people spending the working day in and around their home. The impact on larger centres may be to reduce footfall, particularly within the week, and result in the shift in expenditure being directed to the smaller town, district and local centres. Whilst this will be a positive for the smaller centres, larger centres may suffer as a result.
- 2.30 Whilst structural changes have had a material impact on the vitality and viability of many UK high streets, there are some beneficiaries. In particular, 'discount variety' operators, such as B&M Bargains and Poundland, have taken advantage of lower rents and reoccupied a number of medium to large retail units. However, as evidenced by the failure of Poundworld and Wilko, there is some evidence that this market may be approaching capacity.
- 2.31 It remains to be seen what additional long-term impacts will eventuate from retail closures resulting from Covid-19 containment measures. However, prior to the implementation of lockdown measures, trading conditions for retailers were challenging and many retailers were struggling to meet costs, including rents, resulting in a higher proportion of retailers restructuring or entering administration. As has been seen since the pandemic, the conditions have only become more challenging.

Leisure and Food & Drink

- 2.32 The greater availability of high street units appears to have helped stoke an entrepreneurial spirit in recent years, with a number of centres beginning to benefit from a greater focus on independent retailers and also modern markets, which are frequently focussed around food and drink operators.
- 2.33 More generally, the food and drink sector has also been buoyed in recent years by the success of mid-market national multiples, which expanded quickly across the UK. This included operators such as Bill's, Byron, Jamie's Italian, Nando's and Prezzo. However, this market has become saturated in many locations and a number of high profile operators have been in financial difficulty. Given the problems suffered by such operators, the market has

¹¹ Article headlined 'Debenhams set to close putting 12,000 jobs at risk', BBC, 1 December 2020.

¹² Article headlined 'After Topshop owner Arcadia's demise, what now for UK clothes shopping?' The Guardian, 13 February 2021.

¹³ Article headlined 'Shopping centre owner Intu collapses into administration', The Guardian, 26 June 2020.

¹⁴ Article headlined 'Loss of nearly 15,000 UK retail jobs a 'brutal start to 2023', report says', The Guardian, 20 February 2023

become more cautious and mid-market operators are picking new sites carefully as a result. Instead, we have seen a number of independent operators flourish, both before and throughout the pandemic, and a desire for customers to choose local operators over larger regional and national brands.

- 2.34 A further significant recent high street success story has been the resurgence of the Town Centre leisure sector, which has resulted in new cinemas being developed close to the shopping core and the emergence of 'competitive socialising' concepts, which include bowling, crazy golf, table tennis, darts, axe-throwing, escape rooms and other seemingly niche pursuits.
- 2.35 Cinema openings have been on the up in recent years and 'boutique' cinema operators – including Curzon, Everyman and The Light – are able to operate from smaller sites in Town Centres (partly as a consequence of digital technology). Town Centre cinema development has successfully underpinned wider mixed-use developments, as food and drink operators are typically keen to locate in close proximity to benefit from spin-off custom. New innovative leisure operators have been particularly beneficial both in re-using existing difficult to let premises, and in driving the evening economy. New leisure concepts include foodhalls, independent craft beer bars, and the abovementioned competitive socialising operators.
- 2.36 More generally, the gym market continues to perform well, with there now being around 7,200 health and fitness clubs across the UK, which are estimated to have a total turnover of approximately £2bn¹⁵. Around one in every seven Britons has a gym membership¹⁶. Budget gyms are currently particularly popular, with operators such as Pure Gym, the Gym Group and easyGym utilising a format that is based on low costs and high volume.
- 2.37 The impact of the pandemic on the leisure industry is still to be determined. Support provided by the Treasury has helped support businesses in 2020 and 2021, and mitigated the effects of 'lockdown' restrictions to some degree. However, the full and ongoing impact will become clearer as more stable trading conditions return.

The Night-Time Economy

- 2.38 The term night-time economy is used to describe a wide range of activities that (typically) take place after 5 pm. This could range from a trip to the theatre or cinema, to a family meal, to a night out at a club. The night-time economy is about catering for a wide range of demographics and interests.
- 2.39 Creating a safe, vibrant and well-balanced evening and night-time offer is a challenge that can dramatically improve the overall health of a Town Centre and boost the economy.
- 2.40 The Association of Town and City Management ('ATCM') has identified a number of themes to help improve the attraction and operation of the night-time economy, which are summarised as follows:
- **Alive After Five** – This relates to revisions to trading hours to better suit customers' shopping needs and availability. A Retail Trading Hours Study commissioned by ATCM found that sales between 5 pm and 8 pm are typically 50% greater than those between 9 am and 11am. Revising trading hours to open and close later could increase sales by around 10% to 12%.
 - **Late Night Transport** – The lack of frequent, efficient and safe public transport late at night, or at least the perception of this being the case, could be having a detrimental effect on night-time economy and social scene. One way of increasing night-time visitor numbers is to promote late-night travel provision and its publicity.
 - **Purple Flag** – This is an accreditation scheme which recognises excellence in the management of town and city centres at night. Obtaining Purple Flag accreditation demonstrates that a town's night-time economy

¹⁵ Article headlined 'Fitness Industry in the United Kingdom (UK) – Statistics & Facts', Statista, 26 May 2021.

¹⁶ Ibid.

offers clean and safe environments, great bars and clubs, a variety of arts and cultural attractions, and excellent transport links.

- **Evening Economy Ambassadors** – The ambassadors improve the evening and night-time experience in a Town Centre by liaising between visitors, police, door staff, licensees, and transport operators.
- **Light Night** – This is an initiative where town or city centres stay open after dark for people to enjoy local shops and services within a wider cultural event involving music, art and, most importantly, through the lighting up of buildings and light-based art installations.

2.41 The above list is not exhaustive, and the development of a bespoke evening economy strategy can help prioritise and deliver events and initiatives which draw on a Town Centre's strengths and address weaknesses.

3. Planning Policy Context

- 3.1 In order to shape the direction of this Study, it is helpful to understand relevant retail and Town Centre planning policy at a national and local level. As such, we first summarise national planning policy of relevance before considering retail and Town Centre development plan policy as set out in the development plan for North Northamptonshire. We also consider changes to the Use Classes Order and the application of permitted development rights to Town Centre uses.

Revised National Planning Policy Framework

- 3.2 The most recent iteration of the National Planning Policy Framework ('NPPF') was published in December 2023. The NPPF reflects the fact that the traditional role of Town Centres has been somewhat undermined by structural changes in the retail sector, and that there may be a need to plan for a more diverse range of uses going forward. As such, the NPPF advocates a more flexible policy framework to support the future vitality and viability of Town Centres.
- 3.3 NPPF policies are considered on a thematic basis below.

Plan-Making

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

Building a Strong, Competitive Economy

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

Ensuring the Vitality of Town Centres

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

'Planning policies should:

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

- 3.7 The requirement to plan to meet needs across a minimum ten-year period represents a change from the previous NPPF which required Town Centre needs to be met in full across the entire plan period.
- 3.8 In addition, it is notable that the NPPF Annex 2 Glossary fails to make any reference to the designation of primary and secondary frontages. Page 32 of the Government Response to the Draft Revised National Planning Policy Framework Consultation indicates that, whilst the revised NPPF has removed the expectation in national planning policy that such frontages must be defined, this does not necessarily preclude authorities from doing so where their use can be justified. However, it is evident that the general intention is to provide for more flexibility through a less prescriptive approach to land use.
- 3.9 Paragraph 94 of the NPPF states that it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail and leisure development that should be the subject of an impact assessment. Any such threshold policy applies only to the impact test. All planning applications for main Town Centre uses that are not in an existing centre and not in accordance with an up-to-date development plan will generally be the subject of the sequential test.

Promoting Healthy and Safe Communities

- 3.10 Paragraph 97 seeks to support the social, recreational and cultural facilities and services communities need. The guidance states that planning policies and decisions should:
- plan positively for the provision and use of shared spaces, community facilities (such as local shops, meeting places, sports venues, open space, cultural buildings, public houses and places of worship), and other local services to enhance the sustainability of communities and residential environments;
 - take into account and support the delivery of local strategies to improve health, social and cultural well-being for all sections of the community;
 - guard against the unnecessary loss of valued facilities and services, particularly where this would reduce the community's ability to meet its day-to-day needs;
 - ensure that established shops, facilities and services are able to develop and modernise, and are retained for the benefit of the community; and
 - ensure an integrated approach to considering the location of housing, economic uses and community facilities and services.

Ensuring the Vitality of Town Centres Planning Practice Guidance

- 3.11 The Town Centres and Retail Planning Practice Guidance ('the Town Centres PPG') was published in July 2019 and thereafter updated in September 2020. It provides additional direction in respect of how retail and Town Centre planning policy should be applied in respect of plan-making and decision-taking. The Town Centres PPG affirms the Government's aspiration to support Town Centres in order to generate employment, promote beneficial competition and create attractive, diverse places where people want to live, work and visit.
- 3.12 Paragraph 004 of the Town Centres PPG indicates that a local planning authority's strategy for their Town Centres should include:
- The realistic role, function and hierarchy of Town Centres over the plan period. Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed.
 - The vision for the future of each Town Centre, including the most appropriate mix of uses to enhance overall vitality and viability.

- The ability of the Town Centre to accommodate the scale of assessed need for main Town Centre uses, and associated need for expansion, consolidation, restructuring or to enable new development or the redevelopment of under-utilised space.
- How existing land can be used more effectively – for example, the scope to group particular uses such as retail, restaurant and leisure activities into hubs or for converting airspace above shops.
- Opportunities for improvements to the accessibility and wider quality of Town Centre locations, including improvements to transport links in and around Town Centres, and enhancement of the public realm.
- What complementary strategies are necessary or appropriate to enhance the Town Centre and help deliver the vision for its future, and how these can be planned and delivered. For example, this may include consideration of how parking charges and enforcement can be made proportionate.
- The role that different stakeholders can play in delivering the vision. If appropriate, it can help establish the level of cross-boundary/strategic working or information sharing required between both public and private sector groups.
- Appropriate policies to address environmental issues facing Town Centres, including opportunities to conserve and enhance the historic environment.

3.13 This particular Study seeks to provide a high-level authority-wide retail and leisure strategy, which will provide an overall context to the determination of planning applications for such uses and will support the Councils' future development plan policy. The Study will also help underpin any future Town Centre-specific strategies or masterplans.

3.14 Paragraph 006 of the Town Centres PPG identifies a series of key indicators of relevance in assessing the health of a centre over time. The indicators allow the role, performance, and function of centres to be monitored and are considered in greater detail at Section 4 of this report (which specifically addresses the vitality and viability of North Northamptonshire's principal centres).

Use Classes Order

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

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

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

- **Use Class E** – Commercial, business and service uses include: shops or retail; cafes or restaurants; financial services; professional services; any service appropriate to provide in a commercial, business or service locality; indoor sports, recreation or fitness; medical or health services; crèche, day nursery or day centre; and, offices.
- **Use Class F1** – Learning and non-residential institutions include any non-residential use for the: provision of education; display of works of art; museum; public library or public reading room; public hall or exhibition hall; for or in connection with public worship or religious instruction; or, as a law court.
- **Use Class F2** – Local community uses include: a shop selling mostly essential goods, including food, no larger than 280 sq.m and where there is no other such facility within 1,000 metres radius of the shop's location. A hall or meeting place for the local community, an area or place for outdoor sport or recreation and an indoor or outdoor swimming pool or skating rink.

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

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

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

Town Centre Use Permitted Development Rights

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

Local Planning Policy Context

3.21 The statutory development plan for North Northamptonshire comprises the Joint Core Strategy ('JCS'), which was adopted in July 2016 and provides the strategic planning policies for development in the authority area from 2016 to 2031, alongside the area-based plans, which include:

- Part 2 Plan for the Borough of Wellingborough - adopted February 2019;
- Part 2 Local Plan for Corby - adopted September 2021;
- Kettering Site Specific Part 2 Local Plan - adopted December 2021;
- Kettering Town Centre Area Action Plan - adopted July 2011;
- East Northamptonshire Local Plan (Part 2) - adopted December 2023.

3.22 The JCS was prepared by the North Northamptonshire Joint Planning Committee, and covers the four former boroughs and districts of Corby, Kettering, East Northamptonshire and Wellingborough. These were replaced by the new North Northamptonshire authority area in April 2021.

3.23 JCS Policy 12 relates to Town Centres and Town Centre uses, and outlines the measures that the Council will use to support the vitality and viability of the Town Centres in North Northamptonshire. These measures include:

- Securing and maintaining a vibrant mix of retail, employment, leisure and cultural facilities and supporting the provision of additional residential uses on appropriate sites including the re-use of vacant space above shops;
- Enhancing the public realm and improving access to the Town Centres for pedestrians, cyclists and public transport users and supporting proposals to provide convenient, safe and secure car parking;

- Maintaining and regenerating Kettering and Corby Town Centres as the focus of higher order facilities and retail investment serving growing communities in the north of the authority area. This will include a minimum increase of 12,500sqm net comparison shopping floorspace in each of Corby and Kettering Town Centres by 2031;
- Adapting and diversifying Wellingborough and Rushden Town Centres to operate successfully alongside the permitted out of centre retail and leisure development at Rushden Lakes, which will provide up to 32,511sqm net retail sales area serving growing communities in the southern area; and,
- Supporting the provision of a medium-sized foodstore to serve the Desborough/Rothwell area and an additional 4,100sqm of convenience goods floorspace in the southern area by 2031.

3.24 In respect of development proposals located outside of the defined Town Centre areas, JCS Policy 12 states that the sequential and impact tests will be applied as set out in the NPPF.

3.25 JCS Policy 11 sets out the network of centres in North Northamptonshire through the spatial strategy, and at Table 1 identifies Corby, Kettering, Wellingborough and Rushden as 'Growth Towns'. These are defined as being the focus for infrastructure investment and higher order facilities to support major employment, housing, retail and leisure development. The second position in the hierarchy is occupied by the eight 'Market Towns', which include Burton Latimer, Desborough, Higham Ferrers, Irthlingborough, Oundle, Raunds, Rothwell and Thrapston. The focus of the 'Market Towns' will be to provide a strong service role for their local communities and surrounding rural areas with growth in homes and jobs to support regeneration and local services, at a scale appropriate to the character and infrastructure of the town.

3.26 In respect of defined Town Centre boundaries and identifying the extent of Primary Shopping Areas, JCS Policy 12 states that the Part 2 Local Plans for each 'Local Area' will provide the relevant policy guidance. In respect of each 'Local Area', the following policies are considered to be of relevance:

- Part 2 Plan for the Borough Council of Wellingborough Policy TC1 defines the extent of the Town Centre boundary and Policy TC2 identifies the Primary Shopping Area. Policy TC3 provides a site-specific policy for The Market regeneration site in the town centre. Policy R1 defines the relevant retail hierarchy, with Wellingborough as the Town Centre. Policy R3 goes on to identify local impact thresholds, which are as follows:
 - a) Wellingborough Town Centre – 1,000 sq.m gross floorspace
 - b) Local centres - 200 sq.m gross floorspace
- Part 2 Local Plan for Corby Policy 21 identifies the primary shopping areas in Corby. Policy 19 defines the network and hierarchy of centres, including the boundaries for each. This policy also identifies local impact thresholds, which are as follows:
 - a) Corby Town Centre – 400 sq.m gross floorspace
 - b) District/local centres - 130 sq.m gross floorspace
- Site Specific Part 2 Local Plan for Kettering Borough Policy TCE4 defines the extent of the Town Centres in the 'Local Area'.¹⁷ Policies BLA1, DES1, and ROT1 also provide specific policies for Burton Latimer, Desborough and Rothwell Town Centres. Policy TCE5 of this plan also sets out local impact thresholds, which are as follows:
 - a) Kettering – 750 sq.m
 - b) Burton Latimer – 400 sq.m
 - c) Desborough – 300 sq.m
 - d) Rothwell – 500 sq.m

¹⁷ The standalone Kettering Town Centre Area Action Plan defines the extent of the Kettering Town Centre area and its primary and shopping frontages.

- East Northamptonshire Local Plan Part 2 Policy EN18, which was adopted in December 2023, defines the extent of town centres and primary shopping frontages. Policy EN19 of this plan sets out the local impacts for retail development, which are as follows:
 - a) Rushden Town Centre – 280 sq.m
 - b) Higham Ferrers, Irthlingborough, Oundle, Raunds (outside the Primary Shopping Area defined in the Neighbourhood Plan) and Thrapston Town Centres – 100 sq.m.

Emerging Policy

- 3.27 Following the formation of the North Northamptonshire authority, the Council began work on updating the Joint Core Strategy through a Plan which is currently referred to as the North Northamptonshire Local Plan. Once adopted, the Plan will focus on strategic matters which will, as a minimum, meet the requirements of the NPPF for North Northamptonshire Council to have a plan that addresses the strategic priorities for the area and responds to the challenges and opportunities. The statutory timetable of the Plan will be 2021 to 2041 with the spatial vision extending to 2050.
- 3.28 To inform the production of this Plan, the Council consulted on the 'Scope and Issues' to understand the planning issues facing the authority area between March and May 2022.
- 3.29 The Council's Local Development Scheme ('LDS'), last updated in November 2023, anticipates a round of consultation on a Draft Plan in June/July 2024, followed by consultation on a Publication Version of the Plan in January/February 2025. The LDS anticipates submission to the Secretary of State for Examination in April 2025, and that the new North Northamptonshire Local Plan will be adopted in September 2026.

Neighbourhood Plans

- 3.30 Within North Northamptonshire, there are a number of 'made' Neighbourhood Development Plans, and further plans currently in preparation. In respect of the main Town Centres, only Higham Ferrers, Raunds and Rushden have 'made' Plans. Furthermore, it is noted that Kettering, Desborough, Rothwell, Thrapston and Irthlingborough have pipeline Neighbourhood Plans.
- 3.31 We summarise below the position of the various Neighbourhood Development Plans across the four 'Local Areas' identified across North Northamptonshire:
- In the Corby 'Local Area', Neighbourhood Plans have been made for Gretton and Cottingham, and Neighbourhood Areas have been designated for Central Corby, Weldon and Stanion.
 - In the East Northamptonshire 'Local Area'¹⁸, Neighbourhood Plans have been made for Brigstock, Barrowden and Wakerley, Chelveston cum Caldecott, Glapthorn, Hargrave, King's Cliffe, Ringstead, Stanwick and Warmington, a Neighbourhood Plan has been submitted for Duddington with Fineshade, and Neighbourhood Areas have been designated for Barnwell, Collyweston, Deene and Deenethorpe, Great Addington, Irthlingborough, Nassington, Oundle, Thrapston and Twywell.
 - In the Kettering 'Local Area', Neighbourhood Plans have been made for Broughton, Braybrooke, Harrington South West Kettering (Headlands Community), and plans are being prepared for, Desborough, Grafton Underwood, Great Cransley, Pytchley, Rothwell, Rushton, and Wilbarston. The Neighbourhood Plan Area for the Barton Seagrave Neighbourhood Plan was designated in December 2023.
 - In the Wellingborough 'Local Area', Neighbourhood Plans have been made for Earls Barton, Ecton, Irchester and Wollaston, and a Neighbourhood Plan Area has been designated for Isham.

¹⁸ It is noted that Neighbourhood Plans have also been made for Higham Ferrers, Raunds and Rushden.

- 3.32 In respect of Town Centre proposals, we have summarised below the key policies of relevance in respect of 'made' Neighbourhood Plans that relate to the main Town Centres in North Northamptonshire.

Higham Ferrers

- 3.33 The Higham Ferrers Neighbourhood Plan 2011-2031 was made in April 2016. In respect of retail, Neighbourhood Plan Policy HF.TCE1, which relates to the Town Centre Commercial Area, states that proposals within this area that diversify and enhance the range of local shops, services and community facilities and create jobs strengthening the vitality and viability of the Town Centre will be encouraged. Proposals for the change of use from existing A1 shops to other main Town Centre uses within the Primary Shopping Frontage will be permitted, provided that proposals would restore the integrity of a previously sub-divided unit, and would result in a positive benefit to the vitality and viability of the Town Centre.

Raunds

- 3.34 The Raunds Neighbourhood Plan was made in November 2017. In respect of development in Raunds Town Centre, Neighbourhood Plan Policy 9 states that proposals for retail, leisure, office, commercial, cultural and tourism uses will be encouraged in the Town Centre, and sets out the criteria against which they will be assessed. Within the primary shopping areas, at least 70% of the existing stock of ground floor commercial space should remain in non-residential use. Proposals which lead to the permanent loss of commercial units should be supported by evidence to demonstrate that their continued commercial use is no longer viable, or that an alternative use would positively enhance the viability and vitality of the Town Centre.

Rushden

- 3.35 The Rushden Neighbourhood Plan was made in June 2018. In respect of retail proposals, Neighbourhood Plan Policy R1, which relates to Town Centre uses, states that new development proposals for main Town Centre uses will be supported where a site falls within the Town Centre area as defined on the Policies Map and causes no harm to amenity. The town council has commenced a review of this plan.
- 3.36 Neighbourhood Plan Policy R2 states that within the Defined Shopping Frontages shown on the policies map, proposals for the change of use from existing A1 Use Class shops to other main Town Centre uses will be permitted provided that the proposal would result in a positive benefit to the vitality and viability of the Town Centre, or would restore the integrity of a previously sub divided unit.
- 3.37 Neighbourhood Plan Policy R3, which relates to first floor uses, states that within the Town Centre, applications for the reuse or conversion of first floor or upper floor uses for residential or B1 Uses will be supported provided that the proposed use does not adversely affect the long-term viability of the existing ground floor use.

Re-Purposing Town Centres

- 3.38 Struggling town centres is not a new phenomenon. Over time, many economic recessions have resulted in hard times for town centres, with waves of closures of high street businesses. However, the scale of the problem during the pandemic is new, directly impacted by social distancing measures as well as the competition town centres face from out of centre retailing and online retailing. This has caused many retailers seeking to downsize to fewer locations and invest in digital platforms, thus town centres have on the most part been hit harder by the pandemic than by previous recessions¹⁹.

¹⁹ [Town Centre Recovery Report, 2022](#)

3.39 A literature review, commissioned by the National Retail Planning Forum found that the single most important thing for the critical success in town centre revitalisation is the active involvement of local authorities. This is because they can:

- resist developments which would have significant adverse impacts on their town centres and high streets;
- promote the vitality and viability of town centres, through flexible planning policies which allow them to diversify and support a mix of retail and non-retail uses including housing;
- lead and foster collaboration amongst stakeholders to achieve cross-sector 'buy-in' and create a clear deliverable vision for their town centres;
- often own income-producing property assets in the town centre, e.g. car parks and shopping centres, and are therefore able to shape transformation and regeneration initiatives;
- have compulsory purchase powers, to assemble sites and ownerships for development and re-purposing;
- have environmental management and social value responsibilities; and
- be highway authorities, and have parking control powers.

3.40 Local authorities do however need the backing of central government, e.g. through national planning policies, planning appeal decisions and financial support. The private sector also needs to commit to maintaining investment in town centres, and continue to encourage innovative town centre uses.

3.41 The Town Centre Recovery Report (2022) in turn has drawn eight recommendations from its literature review. These are:

1. Recognise local authorities as the stewardship of the high street.
2. Create strategic visions to bring ideas, people and funding together.
3. Look beyond retail.
4. Bring cross-sector partners together through governance.
5. Provide the tools and opportunities for communities to lead.
6. Use new digital tools to engage.
7. Re-define measurements of success.
8. Build skills and capacity in-house to drive change.

Planning Reform on the High Street

3.42 One of the most impactful planning reforms in respect of repurposing town centres has been the consolidation of a number of separate Use Classes under a single Class E 'Commercial, Business and Service' use. This update to the Town and Country Planning (Use Classes) Order 1987 (the 'UCO') came into effect in September 2020. The new Use Class combines shops, restaurants, offices, gyms and nurseries (amongst other uses) such that planning permission is no longer required to switch uses.

3.43 Furthermore, in March 2021, an update was made to the General Permitted Development (England) Order 2015. This allows for the change of use from Class E properties to residential from August 2021 (extending a right that had previously been restricted to office uses). This permitted development right is subject to maximum size requirements, the property having been in use as Class E for two years and vacant for three months. An application to the determining authority for 'prior approval' is also required for limited consideration of impacts relating to transport, contamination, flood risk, noise, light, and neighbourhood amenity. Further limitations apply in

Conservation Areas and for nurseries, as well as in areas covered by 'Article 4 directions' where the rights are extinguished.

- 3.44 On 20 July 2021, paragraph 53 of a new iteration of the National Planning Policy Framework ('NPPF') introduced new limitations on the use of Article 4 directions. These changes have been subsequently carried forward and are reflected in the latest version of the NPPF of December 2023. The revised national policy significantly narrows the areas in which it is justified to introduce Article 4 directions, limiting local authorities' ability to control development.
- 3.45 The changes in the application of Article 4 directions were first put forward in the January 2021 consultation for draft revisions to the NPPF. However, the actual policy provision differs from the initial consultation in a couple of key areas. Paragraph 53 of the December 2023 NPPF recognises that the loss of the 'essential core of a primary shopping area' could result in wholly unacceptable adverse impacts on an area's vitality and viability. This is the Government's first acknowledgement of the potential for the permitted development rights to undermine the health of centres in the NPPF. The updated text also introduces a requirement for 'robust evidence' to support the removal of permitted development rights.
- 3.46 This can be seen as generally good news for local authorities concerned about the erosion of retail and service uses, and the need to protect vulnerable centres from potentially poor-quality residential development. Protection of the vitality and viability of a high street or Town Centre against the adverse impacts of change of use is now established as justification for issuing an Article 4 direction.

National High Street Rental Auction Policy Consultation

- 3.47 In 2022, the Government highlighted its intention to introduce the High Street Rental Auctions Policy as part of the draft Levelling Up and Regeneration Bill 2022, aiming to reduce the number of commercial properties sat empty on our high streets²⁰.
- 3.48 The reasoning behind the proposed policy is that it has been found that high levels of vacancy in town centres often increase the negative impact on the economic performance of the local area, and contribute to high unemployment rates. This is particularly apparent in the North of England where unemployment exceeds the national average²¹.
- 3.49 The consultation to gather industry views on this policy ran for 12 weeks to 7 July 2023. The aims the government have of this new policy are to:
1. Regenerate high streets and crack down on anti-social behaviour;
 2. Mobilise the commercial rental market and prevent units from sitting vacant for long periods of time;
 3. Increase co-operation between landlords and local authorities; and
 4. Make high street properties more accessible and affordable for tenants.

²⁰ [High Street Rental Auctions](#)

²¹ [High Street Rental Auctions Policy Consultation](#)

4. Market Research - Healthchecks

Introduction

- 4.1 Paragraph 86 of the NPPF indicates that planning policies should promote the long-term vitality and viability of Town Centres by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries. The same paragraph also states that Town Centres should accommodate a suitable mix of uses (including housing) and provide for development that reflects a centre's distinctive character.
- 4.2 Paragraph 006 of the Town Centres PPG identifies a range of indicators that should be assessed over time in order to establish the health of a Town Centre. The indicators include the following:
- diversity of uses;
 - proportion of vacant street level property;
 - retailer representation and intentions to change representation;
 - pedestrian flows;
 - accessibility;
 - perception of safety and occurrence of crime;
 - the state of Town Centre environmental quality;
 - the balance between independent and national multiple retailers; and
 - the extent to which there is an evening and night-time economy.
- 4.3 New healthcheck assessments have been undertaken for the twelve Town Centres in North Northamptonshire²², defined as the 'Growth Towns' and 'Market Towns' as identified at Table 1 of Policy 11 of the North Northamptonshire Joint Core Strategy 2011-2031.
- 4.4 The assessments are based on site visits which were undertaken in December 2022. These assessments should be taken as a 'snapshot' of the performance of each centre at a moment in time. We envisage that the high rate of inflation and other economic pressures at this time may impact on future operator representation and the healthcheck assessments should be viewed in this context.
- 4.5 The composition of each of the Town Centres is set out at Table 4.5.1 below. Composition maps of each centre can be found in Appendix D.

²² These being Corby, Kettering, Wellingborough, Rushden, Desborough, Rothwell, Burton Latimer, Oundle, Thrapston, Raunds, Irthlingborough and Higham Ferrers.

Table 4.5.1 North Northamptonshire's Principal Centres Unit Composition at December 2022

Centre	Total Units	Comparison (%)	Convenience (%)	Financial and Business Service (%)	Leisure Service (%)	Retail Service (%)	Vacant (%)
Corby	177	28.8	13.6	12.4	22.6	10.2	12.4
Kettering	387	25.3	9.8	9.8	19.1	18.9	17.1
Wellingborough	351	18.2	11.7	10.5	22.5	17.7	19.4
Rushden	190	22.6	10.5	13.2	18.9	17.4	17.4
Rushden Lakes	96	50	5.2	0	27.1	4.2	13.5
Desborough	50	16	6	8	32	18	20
Rothwell	64	31.9	9.7	11.1	18.1	19.4	9.7
Burton Latimer	47	10.6	8.5	10.6	34	27.7	8.5
Oundle	72	31.9	9.7	11.1	18.1	19.4	9.7
Thrapston	55	27.3	9.1	14.5	25.5	21.8	1.8
Raunds	58	17.2	12.1	3.4	22.4	31	13.8
Irthlingborough	48	14.6	6.3	8.3	25	25	20.8
Higham Ferrers	47	23.4	14.9	4.3	29.8	19.1	8.5
National Average	-	26.9	9.3	8.7	25.3	15.8	13.8

Source: Composition of principal centres derived from Nexus Planning survey of December 2022; Experian Goad national averages at January 2023

Rushden Lakes

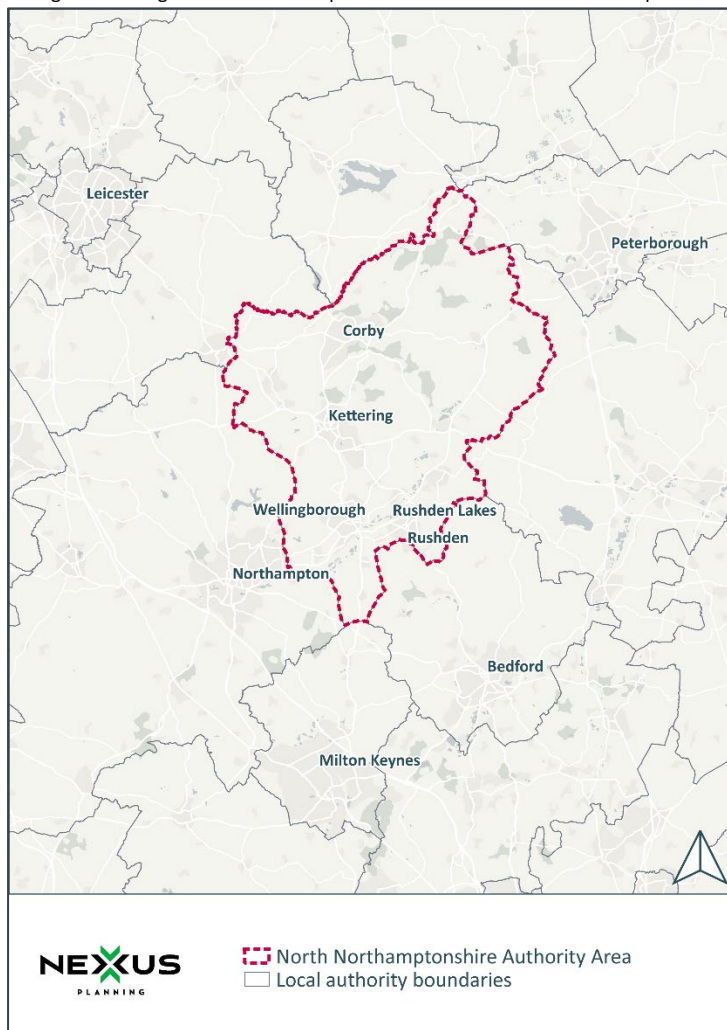
- 4.6 As a preface to the following healthchecks, it is important to understand the impact to the Town Centres in North Northamptonshire as a result of the opening of Rushden Lakes in 2017. Rushden Lakes is an out of centre retail park, currently comprising 96 units, of which 48 are predominantly national multiple comparison units. It is located in the East of the district, within close proximity to the town centres of Rushden, Higham Ferrers and Irthlingborough.
- 4.7 As a result of the opening of Rushden Lakes, it has been found that all Key Centres besides Corby Town Centre have experienced a negative impact on their turnover. Kettering Town Centre has suffered the most since the opening of Rushden Lakes, experiencing a 50% loss of turnover in 2023.
- 4.8 Rushden Lakes has particularly eroded the market share of larger town centres which may have previously been able to sustain a range of clothing and footwear retailers. The larger town centres are now facing high vacancy rates, and are struggling to attract businesses and subsequent footfall. In comparison to this, the smaller towns in North Northamptonshire have experienced less of a decline, due to their offering of smaller, independent businesses, providing visitors a unique experience and catering for more local needs.

Table 4.8.1 'No Development Scenario' Trading Performance of Key Centres at 2023

Destination	'No Development' Study Area Turnover at 2023 (£m)	Post-Rushden Lakes Study Area Turnover at 2023 (£m)	Difference in Turnover Figures (£m)	Impact (%)
Corby Town Centre	97.1	114.2	17.1	+18%
Kettering Town Centre	164.1	82.4	-81.6	-50%
Wellingborough Town Centre	96.6	71.2	-25.5	-26%
Rushden Town Centre	44.3	25.0	-19.3	-44%
Rushden Lakes	-	180.0	+180.0	-

North Northamptonshire's Principal Centres

The regional setting of North Northamptonshire's main town centres in respect to the largest regional competitors



Corby Town Centre

Description

- 4.9 Corby is one of the larger centres of the study, and as such provides a diverse range of retail and service operators to provide for the day-to-day needs of the local community as well as having an offering that attracts people from the wider North Northamptonshire area.
- 4.10 Corby largely grew in population post WWII with a Town Centre plan being produced in 1952. As a result of this, the centre has a large offering of purpose-built retail floorspace, although this offering has a rather dated aesthetic due to the period of development. The key advantage of the amount of purpose-built retail floor space is that the centre has proven attractive to national multiple retailers, as well as independent operators. However, the development of Willow Place Shopping Centre, an open-air shopping complex in the south of the centre, which opened in 2007, has seemingly over provided purpose-built retail floorspace in Corby as a majority of the units to the east of the development remain vacant.
- 4.11 More recently, in June 2021 Corby was awarded £19.9 million through the Towns Fund. The funds will be used on four projects, designed to encourage economic growth in the local area, which are: Corby Sixth Form College, set to open in September 2023 and is carbon neutral; renovation of the unused lower floors of Grosvenor House to provide a permanent new home to arts and culture venue with a community focus; improvements to Corby Station links through works to the public realm to provide an attractive and safe pedestrian and cycle connection; and Establishing Corby as a smart and green town centre through harnessing connected and clean technologies.
- 4.12 Corby is highly accessible, with a compact retail core that is easily navigable for pedestrians, that has undergone significant regeneration in recent years. The centre is well served by bus routes that provide access to a relatively wide catchment area, and there is an out of centre rail station, located just over a mile away.

Photos of Willow Place Shopping Centre looking east, and Corporation Street looking west (taken December 2022)



GOAD Composition and Vacancies

- 4.13 There are 51 comparison goods operators in Corby, which equates to 28.8% of all units in the Town Centre, a figure marginally higher than the national average of 26.9%. The comparison operators are predominantly found to the east of George Street and include a range of national multiples such as Primark, Boots, TK Maxx and H&M and a selection of more independent operators.

- 4.14 Our survey recorded a total of 24 convenience goods operators, which accounts for 13.6% of all units in the Town Centre. The national multiple operators include Iceland and Holland and Barrett, with a majority of convenience goods operators being independent.
- 4.15 80 units were identified as being in service use, which includes leisure, retail and financial and business service operators and accounted for 45.2% of all units. Having such a high proportion of service units is a trend that has been seen nationwide as they occupy vacated comparison goods units. The recent development located to the west of George Street has provided a modern offering of leisure service units with a cinema, 50m swimming pool that serves as a regional facility, a theatre with capacity of over 400, and three restaurant units occupied by national multiples. There is another concentration of service uses to the north of the centre, out of the key retail core along the northern end of George Street. All of the retailers here are independent.
- 4.16 There appears to be a reasonable night-time economy in the Town Centre, given a number of bars, pubs and restaurants, although at the time of visit this could not be observed.
- 4.17 At the time of survey, there were 22 vacant units in the Town Centre, accounting for 12.4% of the units in Corby. This figure is lower than the national average of 13.8%. However, when looked at in floorspace terms, 15% of all floorspace in the centre is vacant, a figure that is higher than the national average of vacant floorspace which also stands at 13.8%.
- 4.18 There is a significant concentration of vacant units located to the east of the newer Willow Place Shopping Centre, as well as the vacant former TJ Hughes building that has a large and prominent presence in the heart of the centre. There is another large vacant premises to the north of the centre that was most recently occupied by The Co-operative Food/ Post Office, although has been vacant for up to eight years. Under policies 24 and TC3 of the Part 2 Local Plan for Corby, this site is allocated as a mixed-use redevelopment opportunity which will include 150 new dwellings.

Table 4.18.1 Corby Town Centre Unit Composition at December 2022

Categories	Corby 2011 (#)	Corby 2011 (%)	Corby 2022 (#)	Corby 2022 (%)	UK Average 2022 (%)
Comparison	72	41.4%	51	28.8%	26.9%
Convenience	13	7.5%	24	13.6%	9.3%
Services (total)	48	27.6%	80	45.2%	49.8%
<i>Retail</i>	11	6.3%	18	10.2%	15.8%
<i>Leisure</i>	20	11.5%	40	22.6%	25.3%
<i>Financial & Business</i>	17	9.8%	22	12.4%	8.7%
Vacant	41	23.6%	22	12.4%	13.8%
Total	174	100%	177	100.0%	100.0%

Environmental Quality

- 4.19 The built form of Corby does not provide a retail setting with any significant degree of uniqueness. There are no listed buildings in the centre, however, there are a few more modern buildings of merit such as the Savoy Cinema and Restaurant complex that was recognised for architectural excellence at the 2016 Insider East Midlands Property Dinner and the Corby Cube that won international acclaim as runner-up in the LEAF award for the Best Public Design of the year. George Street, which has been widened to maximise pedestrian flows, is an attractive

through road, although only about half of the units that line the road to the east have active shop fronts. Vibrancy would be increased with more active frontages to this road. It is thought that the entire centre would benefit from investment to improve facades of the low-rise buildings through the centre, as well as homogenisation of the style of shop frontages to increase the attractiveness of the town.

- 4.20 The public realm in Corby could also benefit from further improvement, and the more recent development to the west could provide a perfect precedent for public realm works across the centre. In the key retail area, there are no planters and there is also a noticeable lack of street furniture such as benches. Given the width of some of the pedestrianised areas, ideas to improve their public realm could also include small play areas for children. Corby Town Centre Regeneration is addressed in the 2019 Corby Borough Council Background Paper – Town Centres and Town Centre Uses. The paper notes the regeneration that had occurred to improve the public realm to the West of Corby Town Centre, and indicated that further redevelopment is commencing South East. It also highlights that improvements to public realm and pedestrian connectivity that draw on the ‘Healthy Streets’ design guidance are suggested in Corby Town Centre. Further to this, Part 2 Local Plan for Corby Policies 22 and 23 provide a regeneration strategy and spatial framework to support and encourage the continued regeneration of Corby town centre.
- 4.21 To the west of the centre, is the expansive Hazelwood and Thoroughsale Protected Ancient woodland and park area. Despite being located outside of the town centre’s boundary, it is inevitable that the presence of the woodland significantly benefits the environmental quality of Corby.

Perception of Safety

- 4.22 Corby Town Centre has a considerable concentration of pedestrian activity and active ground floor uses on the most part. The level of activity around the highly concentrated centre ensures a standard of both natural and passive surveillance, that improves the perception of safety. In November 2022, 438 crimes were reported in the entire town of Corby, with only 29 of these being reported in the defined Town Centre. This figure is significantly down from November 2021, where 53 crimes were reported in this area.
- 4.23 The amount of open shop fronts adds to an overall high perception of safety, although there are some areas in the more peripheral parts of the centre that could encourage crime due to there being no active shop fronts, limited natural light due to tight precincts and being a ‘dead end’, factors that do not provide natural surveillance. Throughout Corby there is however an extensive network of CCTV, that has been installed for the purpose of community safety and prevention and detection of crime.

Accessibility

- 4.24 The standards of accessibility, by various means of transport is considered average to good in Corby Town Centre.
- 4.25 Accessibility by bus is very good, with bus stops located either side of the main shopping area along George Street, as well as there being a few services along Elizabeth Street. The bus services along George Street include 3, 20, X4 Gold, 1, 2C, 4, 14, 15 and 19, and serve a range of destinations locally including Poets, Welland Vale, Beanfield, Danesholme, Corby Old Village and Oakley Vale, as well as providing services to further destinations including Peterborough, Oundle, Northampton, Thrapston and Kettering. The stops along Elizabeth Street are served by the same routes.
- 4.26 Corby Railway Station is located approximately a mile east of the Town Centre, and access by foot takes 20 minutes either along the A427 which runs south of the centre and is a major vehicle route, or along Cottingham Road which runs north of the centre and is a more local road. The station is accessible from the centre, as a majority of the bus routes stop within 0.2 miles (4 minute walk) from Corby Railway Station. Services run to St Pancras International in London, Melton Mowbray and Kettering.

- 4.27 Private vehicle parking in Corby Town Centre is mainly provided by large surface car parks. The multi-storey Town Centre Gateway car park is located to the south of the centre, however it is comparatively more expensive than other nearby car parks at £1.50 for three hours compared to £1 for three hours at the Cube. Another large car park is located by the Oasis Retail Park towards the north of the centre. Parking here is slightly cheaper than the multi-storey Town Centre Gateway car park at £1.35 for three hours although Google reviews suggest that there are a lot of concerns regarding the machines not working and visitors being fined. The leisure facilities to the west of George Street are served by another two, large, open air car parks. The centre is therefore considered to be easily accessible by private vehicle, with these car parks also being well related to the Town Centre and key retail core.
- 4.28 Pedestrian accessibility is generally good throughout the key retail core of the Town Centre, largely by virtue of limited traffic movements through this location due to expansive pedestrianised areas. George Street to the west of the key retail core only has two crossing points, and given the nature of the road, it could benefit from at least another crossing point at the north of the road. Again, along Elizabeth Street to the east of the key retail core there are only two crossing points, and likewise this road could benefit from more. Although the A427, to the south of the key retail core, only has two crossing points, there are no footpaths into the below development suggesting it is not a key route to access the centre.
- 4.29 There are residential areas mainly to the north, south and east of Corby, with a majority of dwellings to the west, however they are restricted in accessing the centre by the expansive Hazelwood and Thoroughsale Protected Ancient woodland and park area. The route through this area has however been improved in recent years due to the addition of signage and footpaths. The area to the north can easily access the centre, however the layout of the southern residential area has meant it is largely blocked from easy access to the centre by street form and also the A427.
- 4.30 Improvements to the connectivity of cycle infrastructure would be beneficial, as, at the time of our fieldwork, there was no evidence of cycle lanes and only a few bicycle racks in the key retail core. As you go from George Street into the leisure area, there is a more plentiful supply of bicycle racks, although at the time of visit it was observed they were not heavily used. Additionally, there is availability of Voi e-scooters in Corby as part of a district wide scheme, however their presence and use was not observed at the time of visiting.
- 4.31 In this regard, we note that in January 2024 North Northamptonshire Council's Executive voted to adopt the Corby Local Cycling and Walking Infrastructure Plan. This ten-year walking and cycling plan outlines proposals for a network of safe walking and cycling routes across Corby and surrounding villages, including dedicated cycle infrastructure, new footways, safer crossings, traffic calming and locations for cycle parking.

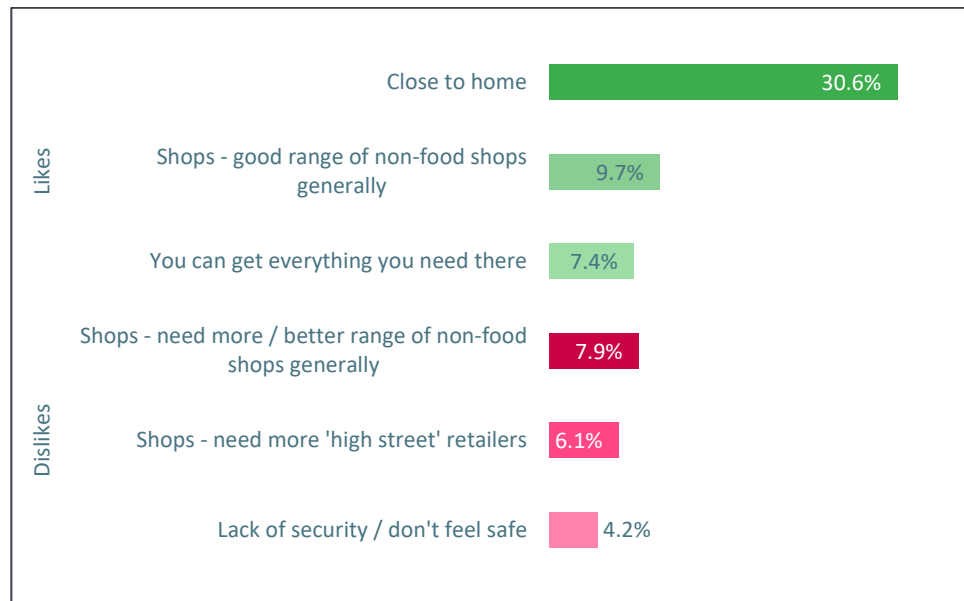
Markets

- 4.32 There is a daily market held on Corporation Street, with traders selling a range of fruit and veg, fresh local produce, clothing and homeware to name a few. Seasonal, and specialist markets also occur in Corby such as a yearly Christmas Market.

Public Opinion

- 4.33 Results from the household survey identified the top "likes" and "dislikes" of the Town Centre, as seen below.

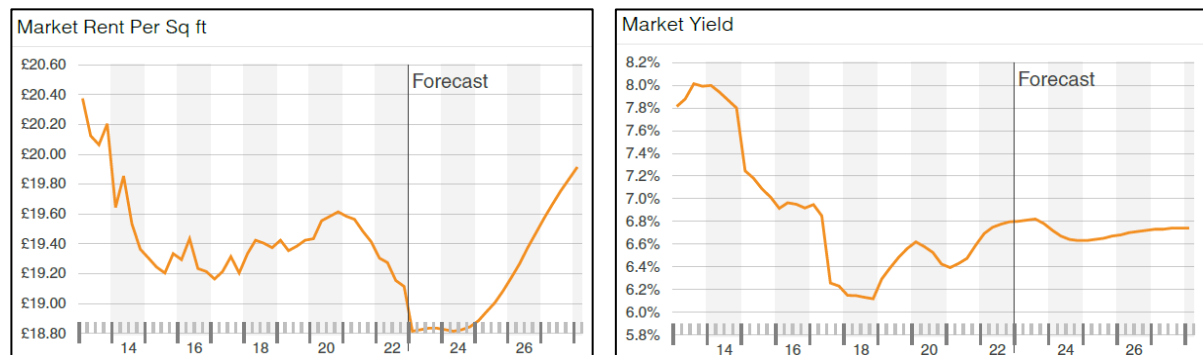
Corby Town Centre Public Opinions



Prime Rents and Yields

- 4.34 The CoStar Retail Report 2023 identifies the market rent per square foot to be £18.86 and identifies that market yield in Corby Town Centre is 6.8%

Figure 4.3: Market Rent per SF and Market Yield for Corby Town Centre



Source: CoStar Retail Report 2023

Commercial Demand

- 4.35 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres.
- 4.36 We have identified one operator that seeks representation specifically in Corby Town Centre. This is shown in the table below.

Table 4.36.1 Operator Requirement List for Corby

Occupier	Description	Size (min) sq ft	Size (max) sq ft
City Electrical Factors	Electrical Wholesaler	2,750	6,000

Source: The Requirement List (March 2023)

Conclusions

- 4.37 Corby is one of the larger retail destinations in North Northamptonshire and provides a range of retail and service operators for the day-to-day needs of the local community, as well as having an offering to attract visitors from the slightly wider area. Although the centre has a large offering, it would benefit from some more independent operators that offer a slightly different service to what is already there. It was also noted that there was only one national multiple supermarket in the centre, being Iceland, with an out of centre Lidl, leaving a potential opening to attract a unit use as such.
- 4.38 It is noticeable that there are a lower number of vacant units in comparison to other centres, but that those which are vacant in Corby tend to be larger units.

Kettering Town Centre

Description

- 4.39 The medieval market town is a key centre in the local authority area, and occupies the highest position in the retail hierarchy. It is marginally the largest Town Centre in North Northamptonshire in respect of the unit numbers and floorspace. The centre has two main cores as it spans north to south. The northern core is focused around Newlands Shopping Centre, and the southern core is focused around the historic market square. The southern core includes a number of attractive period buildings including the Grade I Listed Church of St Peter and St Paul, that add to the character of the town but which do not provide modern, purpose built accommodation that appeals to national multiple retailers. These two areas are connected by the High Street, which further provides a range of shops and other town centre uses.
- 4.40 However, Newlands Shopping Centre in the northern part of the town that opened in 1977, provides a significant amount of purpose-built retail accommodation, and as such accommodates the greatest concentration of national multiples in Kettering. The town accommodates a number of independent retailers alongside more traditional day-to-day retail service operators. There are very few high-end retailers in Kettering, like the majority of North Northamptonshire's centres.
- 4.41 Although the town has a diverse range of retail operators, it also has a vacancy rate that is higher than the national average. Despite a number of these vacancies being a result of wider market trends, and the direct impacts of the Covid-19 pandemic, great efforts will be required to diversify the offer in the town centre to both re-let currently vacant properties but to also drive additional footfall in order to support old and new businesses.
- 4.42 Kettering Town Centre is well integrated into the transport network. The centre is an attractive retail destination in North Northamptonshire, with a number of attractive shopfronts mainly in the south which add to the vibrancy of the street scene.

Photos of High Street looking north, and Meadow Road looking east (taken December 2022)



GOAD Composition and Vacancies

- 4.43 Kettering is a key retail and service location in North Northamptonshire, and as such its offer is focused around comparison goods and service operators. There are 98 comparison goods operators in the Town Centre, which equate to 25.3% of all units. This figure is slightly lower than the current national average of 26.9% of comparison units recorded in January 2023.
- 4.44 By virtue of the town's size, the comparison goods sector is relatively diverse, although there is room for improvement given the centre's role in the retail hierarchy in North Northamptonshire. Kettering only contains a few national multiples, such as TK Maxx, Boots and Waterstones and there are very few high-end retailers.
- 4.45 The proportion of convenience goods operators in the Town Centre is slightly higher than the national average of 9.3%, with 38 operators present at the time of our visit, equating to 9.8% of all units in Kettering. Convenience operators include national multiples such as Iceland, Morrisons, and Sainsburys, alongside a large number of smaller convenience stores and independent operators. The offer is considered to be suitably diverse and a key anchor to activity in the centre.
- 4.46 Service (leisure, retail and financial and business) operators account for 47.8% of all units in Kettering. This figure is reflective of wider changes across many centres, with leisure and retail service operators taking some of the space vacated by comparison goods retailers. There are 74 leisure service operators, which account for 19% of units (lower than the 25.3% national average) in the Town Centre and 73 retail service operators, accounting again for 19% of units (higher than the national average of 15.8%). The 38 financial and business services in Kettering account for 10% of all units, a figure marginally higher than the 8.7% national average.
- 4.47 Leisure service operators include cafes, hot-food takeaways, restaurants, cinemas, nightclubs and public houses. The leisure offer is considered to be generally attractive with a good offer of independent businesses along with a few national multiples, acting as a key anchor to help drive activity. Kettering has won the Purple Flag Award which recognises a safe, thriving and vibrant evening economy three times, most recently in 2019.
- 4.48 Our assessment identified a total of 66 vacant units throughout the Town Centre, equivalent to 17.1% of retail units in Kettering, and amounting to 20% of the available floorspace in the centre. This proportion of units that are vacant is significantly higher than the national average of 13.8% recorded in January 2023. As such the vacancy rate is a matter of concern and is potentially impacting visitors' perceptions of the centres attractiveness.

4.49 Vacant units are located around the town centre, however there is a particular concentration of vacancies in Newlands Shopping Centre and the roads immediately surrounding it, including Gold Street, Silver Street, Newland Street and Montagu Street. A couple of these vacancies being large units, such as the former Argos, Colemans Stationers, and New Look units, further adds to the impression of reduced vibrancy in this particular part of the town. As a consequence, these areas are notably less vital and viable, and there is a need to work with stakeholders to consider how to promote greater activity to be brought to the area as a top priority.

4.50 Attention should therefore be given to reoccupy these units as a means to reduce the overall vacancy rate in Kettering. However, applications are still being approved to provide more retail space, including application number NK/2021/0957 which was approved in June 2022 for a mixed use development consisting of 28 no. flats and a ground floor commercial unit. This development was under construction at the time of our visit, and no future occupier was indicated.

Table 4.50.1 Kettering Town Centre Unit Composition at December 2022

Categories	Kettering 2011 (#)	Kettering 2011 (%)	Kettering 2022 (#)	Kettering 2022 (%)	UK Average 2022 (%)
Comparison	155	46.4%	98	25.3%	26.9%
Convenience	21	6.3%	38	9.8%	9.3%
Services (total)	101	30.2%	185	47.8%	49.8%
<i>Retail</i>	28	8.4%	73	18.9%	15.8%
<i>Leisure</i>	39	11.7%	74	19.1%	25.3%
<i>Financial & Business</i>	34	10.2%	38	9.8%	8.7%
Vacant	57	17.1%	66	17.1%	13.8%
Total	334	100%	387	100%	100%

Environmental Quality

4.51 Kettering Town Centre has varying degrees of attractiveness as a retail destination. The medieval market town expanded rapidly in the later 19th century, creating a town with a rich combination of the medieval church of St Peter and St Paul, pre-industrial buildings and the Victorian infrastructure that was developed to serve the new flourishing community. Many of the late 19th and early 20th century buildings in Kettering are historically and architecturally important as they were designed in an English Renaissance style by John Alfred Gotch. However, over time there have been infill developments that are not in keeping with the historic built form. Façade alterations would be an easy solution to homogenising the streetscape, giving homage to the centre's rich architectural history.

4.52 A large area of the Town Centre is now protected by the Kettering High Street Heritage Action Zone that was designated in 2020, an initiative by Historic England that intends to 'breathe new life into our Town Centres by revitalising buildings and helping to regenerate a vibrant place for locals, businesses and visitors'. This designation has brought a grant to the area from Historic England, allowing property owners and business owners to benefit from shopfront and frontage improvements, building repairs and conversion and reuse of heritage buildings. It will also see substantial improvements to the public realm in Kettering, specifically to the southern end of High Street between the HSBC and McDonalds onto Meadow Road, along with general streetscape improvements within the Town Centre.

- 4.53 The centre would benefit from more street furniture along with the addition of more street planters and the planting of trees to improve the public's perception of the centre. Street furniture was present, although it feels clustered and there are areas with no provision.

Perception of Safety

- 4.54 According to Police.co.uk, 610 crimes were reported in Kettering in November 2022, of which 279 of these were reported within the defined Town Centre. This compares slightly lower to the 293 crimes reported in the same area in November 2021.
- 4.55 At our time of visit, graffiti and anti-social behaviour did not come across as an evident problem, although some loitering was observed towards the north of the centre and graffiti was noticed along main thoroughfares on hoardings and vacant properties. Whilst many aspects of the Town Centre benefit from a good standard of natural and passive surveillance, areas away from the main retail cores were observed to have lower levels of footfall, reducing the perception of safety to users.

Accessibility

- 4.56 Kettering is well related to the surrounding settlements to the north, south and east, and is considered to have a good standard of accessibility by public transport, private vehicle and foot. Accessibility is more restricted to the west due to the mainline railway line that has limited pedestrian and vehicle crossings.
- 4.57 Kettering train station is located just south of the centre, and can be accessed by foot walking down Station Road, which is just off from Market Place. From here, frequent services travel to St Pancras International Station, London, calling at Bedford, Luton and Luton Airport on the way, and Corby in the opposite direction. Slightly less frequent services run to Nottingham, also calling at Market Harborough and Leicester. Although the station is outside of the centre's boundary, it is considered to be easily accessible from it.
- 4.58 A majority of the bus stops in Kettering are located along Eskdail Street/ Newland Street/ Horse Market/ London Road which could be deemed the main road through the centre. The stops along here support a good number of services (such as 10, 17A, 18, 19, X10, 15, 16, X4 Gold and 48), which provide access to local places such as Wellingborough, Corby, Desborough, Rushden and the village of Mawsley as well as locations further afield, such as Northampton and Market Harborough. These bus routes also stop frequently around Kettering, although there are some large areas directly out of the centre that are not served by bus routes. The bus routes have varying rates of frequency.
- 4.59 The Town Centre has good accessibility for private vehicles, with a number of small to medium sized surface car parks all around the centre. There is a large 305 space multi-storey carpark at Newlands Shopping Centre, as well as a large open air car park at Morrisons food store that provides free parking for 2.5 hours. These facilities provide short and long term spaces for those who are visiting the Town Centre and are well related and easily accessible to the range of facilities in Kettering. However, there is a shortfall of parking provision to the south of the centre as a majority of the provisions are located to the north.
- 4.60 E-bikes and trial e-scooter schemes are available to Kettering's visitors and residents, offering a low cost environmentally friendly mode of transport around the town. Since being introduced to Kettering, Burton Latimer, Wellingborough, Corby, Rushden and Higham Ferrers, over 1 million rides on e-scooters have been taken since 2021.
- 4.61 Infrastructure to support pedestrians and cyclists could however be improved in Kettering. The footpaths around the Town Centre were on the most part even, and in areas with higher footfall, the footpaths are widened to safely support and facilitate pedestrian movements. It was also noted that the Town Centre would benefit from more

crossing points along major vehicular routes, notably along Silver Street/ Horse Market/ London Road where only two zebra crossings were observed, as well as a traffic light controlled staggered crossing point. There were a couple of areas that had dropped kerbs to indicate a crossing point, however there was no right of way indicated for pedestrians. The Kettering Local Cycling and Walking Infrastructure Plan (LCWIP) includes assessments of walking routes and prioritised proposals for their improvement.

- 4.62 Cycle infrastructure in Kettering is inconsistent and often sporadic in nature. The only place a cycle lane was observed was along Newland Street. There was only a limited provision of public cycle racks noticeable around the Town Centre. The Kettering LCWIP identifies a strategic cycle route network for the urban area and beyond. Given the proximity of Kettering Town Centre to the surrounding area, promoting cycling as a form of transport could see Town Centre footfall increased.

Markets

- 4.63 The historic market town of Kettering still runs regular markets. There is a weekly Wednesday market held on Gold Street that was historically more of a collectors market but is now open to all traders. There is also a Friday and Saturday market on High Street and Gold Street. The council also occasionally runs speciality markets on the Market Place, most recently being the Kettering Christmas Market which ran for four consecutive Saturdays on the lead up to Christmas.

Public Opinion

- 4.64 Results from the household survey identified the top “likes” and “dislikes” of the Town Centre, as seen below.

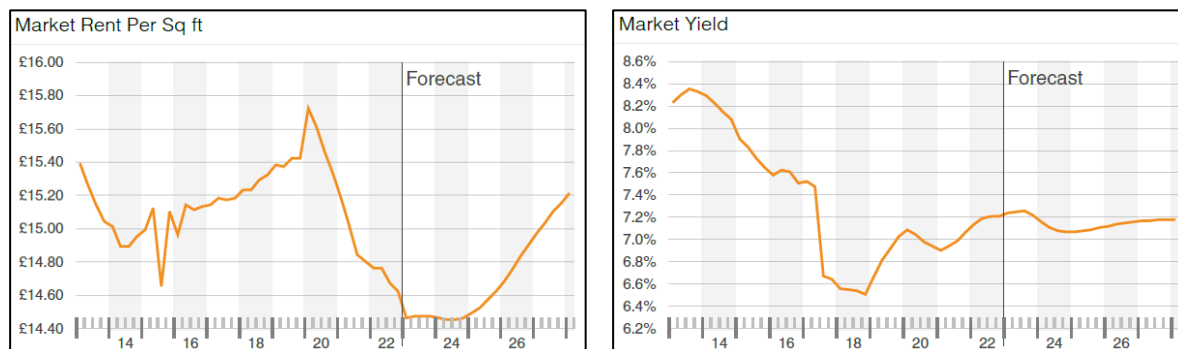
Kettering Town Centre Public Opinions



Prime Rents and Yields

- 4.65 The CoStar Retail Report 2023 identifies the market rent per square foot to be £14.49 and identifies that market yield in Kettering Town Centre is 7.2%.

Market Rent per SF and Market Yield for Kettering



Source: CoStar Retail Report 2023

Commercial Demand

- 4.66 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres.
- 4.67 We have identified fifteen operators that seek representation specifically in Kettering Town Centre. This is shown in the table below.

Table 4.67.1 Operator Requirement List for Kettering

Occupier	Description	Size (min) sq ft	Size (max) sq ft
Age UK	Charity	1,400	8,000
Aldi	Supermarket	18,000	22,000
Angling Direct	Fishing store	3,500	5,000
Dunkin'	Donut and Coffee Company	200	2,000
Just for Pets	Pet Retailer	2,500	6,500
Kaspas	Gelato and Dessert House	2,500	5,000
KFC	Fast Food Restaurant	1,800	3,500
Lidl	Supermarket	18,000	26,000
M&S Food	British Multinational Retailer	12,500	25,000
Machine Mart	Tools & Machinery Equipment	1,500	8,000
MaxiSaver	Discount retailer	2,500	6,000
Monkey Puzzle Day Nurseries	Day Nursery	2,500	7,000
Nolte Kitchen	Kitchen Retailer	1,000	2,500
Optima Self Store	Self-Storage Unit	-	-
Safestore	Self-Storage	20,000	100,000

Source: The Requirement List (March 2023)

Conclusions

- 4.68 Kettering is the largest centre in North Northamptonshire in respect of both unit numbers and floorspace. The Town Centre has a provision of purpose-built accommodation such as Newlands Shopping Centre, although the majority of the retail provision derives from ground floor conversions of historic buildings. The town accommodates a number of independent retailers along with a wide variety of traditional day-to-day retail and service operators.
- 4.69 Although the town benefits from a diverse range of retail operators, it also has a vacancy rate higher than the national average. Whilst these vacancies have been the result of wider market trends, the proportion of vacant

units is such that efforts are required to diversify the offer in the centre to re-let vacant properties and also increase the footfall to ensure current and future businesses thrive.

- 4.70 Issues that were identified in the study due to the built form and public realm in Kettering are likely to be rectified to an extent through the grant attached to the designation of the Kettering High Street Heritage Action Zone. It is unlikely this money will be the solution to all the identified issues, although it is a positive step forward for future change.
- 4.71 The centre would appreciably benefit from improvements to the cycle infrastructure, both in terms of storage and safe cycling routes down key routes into the centre. The proximity to the local area provides an excellent base for improvements, followed by the need for secure, covered, storage for bikes at final destinations.

Wellingborough Town Centre

Description

- 4.72 The historic market town of Wellingborough is the second largest centre of the study, and as such, is a key centre in North Northamptonshire. The compact town is focused around the historic market square, along with the Grade I listed Church of All Hallows and its associated buildings that are also listed. The centre is now dominated by day-to-day retail and service operators, occupying a mixture of attractive period buildings, that have been overrun in areas by modern infill developments.
- 4.73 Swansgate Shopping Centre, located to the south of the centre provides a significant amount of purpose built retail accommodation, and, as such, accommodates a large concentration of national multiples. The shopping centre opened in the early 1970s, and was originally known as the Arndale Centre. The centre plays a key role in meeting the needs of the local population and day visitors.
- 4.74 Although the town benefits from a diverse range of retail operators, it also has the highest vacancy rate of all of the larger centres in North Northamptonshire, with this vacancy rate standing significantly higher than the national average. Whilst a number of these vacancies will have been the result of wider market trends, the high proportion of vacant units is such that major efforts are required to diversify the offer in the Town Centre to both re-let currently vacant units, but to also improve the wider offering of the town to increase footfall.

Photos of Sheep Street looking south, and Market Street looking west (taken December 2022)



AD Composition and Vacancies



GOAD Composition and Vacancies

- 4.75 Wellingborough is a key retail and service location in North Northamptonshire, and as such its offer is predominantly focused around comparison goods and service operators. The composition of land uses across the Town Centre does not correlate to the current national average.
- 4.76 There are 64 comparison goods operators in the Town Centre, which equate to 18.2% of all units. This figure is significantly lower than the national average of 26.9%. This lower figure will be partially reflective of the knock on effects from wider changes in respect of comparison goods operators, along with competition from Rushden Lakes. Wellingborough has not been directly impacted by the narrowing of department store provisions, nor has it seen popular high street multiple fashion stores, such as those run by Outfit, close their doors as they were not formerly present.
- 4.77 Given the size of the Town Centre, the comparison goods sector would benefit from its offering becoming more diverse. Wellingborough contains a selection of national multiples such as WHSmith, New Look, Matalan and Holland & Barrett, although would benefit from a few more key national multiples, it's location in respect to Rushden Lakes suggests that this is not viable.
- 4.78 The proportion of convenience goods operators in the Town Centre is above the national average, with 41 such operators present at the time of our visit, equating to 11.7% of all units in Wellingborough (the current national average equates to 9.3% of operators). Convenience operators in the centre include national multiples such as Morrisons and Aldi, alongside a large number of smaller convenience stores and independent operators. As such, given the high proportion of convenience stores, the offer is deemed to be diverse and a key anchor of activity in the Town Centre.
- 4.79 Service operators account for 50.7% of all units in Wellingborough. This figure is likely reflective of wider changes across many centres, with leisure and retail service operators taking some of the space vacated by comparison goods retailers. There are 79 leisure service operators, which account for 22.5% of units in the Town Centre. This figure is slightly lower than the current national average of 25.3%. Leisure service operators include cafes, hot-food takeaways, restaurants, cinemas, night clubs and public houses. Although there is a high leisure offer in the centre, it is relatively limited with 32 of the service operators being fast food and takeaways, with only 10 restaurants that do not constitute any national multiples, indicating an area of growth from which the centre would benefit.
- 4.80 It must also be noted that located just south of the Swansgate Shopping Centre is Castle Theatre and The Wellingborough Museum. Although not located within the defined town centre, the presence of these will likely drive footfall to the centre.
- 4.81 Retail service operators account for 17.7% of units, a figure well above the current national average of 15.8%, and the 37 financial and business units account for 10.5% of units, again, well above the national average of 8.7%. Since our visit, Barclays Bank has closed its branch in Wellingborough, which will have negatively impacted the percentage of business units.
- 4.82 Our survey identified a total of 68 vacant units throughout the town centre, equivalent to 19.4% of retail units in Wellingborough. The proportion of units that are vacant is significantly higher than the national average of 13.8%. As such, the vacancy rate is a matter of concern and will inevitably impact visitors' perceptions of the centre and its attractiveness as a retail destination.
- 4.83 Vacant units are evenly distributed throughout the centre, making their impact lesser as there are no intense concentrations of vacancies. However, there is still an urgency to work with stakeholders (including landlords) to

consider how greater activity can be brought to the centre to encourage viable occupation of these units. It would make sense to focus on achieving reoccupation around Swansgate Shopping Centre, and the surrounding roads, namely Midland Road, Market Street and Sheep Street to create a vibrant core in the first instance.

Table 4.83.1 Wellingborough Town Centre Unit Composition at December 2022

Categories	Wellingborough 2011 (#)	Wellingborough 2011 (%)	Wellingborough 2022 (#)	Wellingborough 2022 (%)	UK Average 2022 (%)
Comparison	24	8.1%	64	18.2%	26.9%
Convenience	118	39.6%	41	11.7%	9.3%
Services (total)	113	37.9%	178	50.7%	49.8%
<i>Retail</i>	43	14.4%	62	17.7%	15.8%
<i>Leisure</i>	42	14.1%	79	22.5%	25.3%
<i>Financial & Business</i>	28	9.4%	37	10.5%	8.7%
Vacant	43	14.4%	68	19.4%	13.8%
Total	298	100%	351	100%	100%

Environmental Quality

- 4.84 Wellingborough Town Centre is protected in its entirety by the Wellingborough Town Centre Conservation Area. The centre has a rich history that is still reflected in the architecture of certain areas of the centre such as around the Grade I listed Church of All Hallows, and its associated buildings such as the vicarage and church hall. There are a high number of listed buildings along Silver Street too such as the Grade II* Hind Hotel. These buildings are generally well maintained. Façade improvements around the centre, to reflect the historic buildings are recommended, to improve the sense of place. However, in general, the quality of the conservation area is poor and deteriorating as per Historic England records.
- 4.85 A significant part of the centre, including the purpose built Swansgate Shopping Centre, is either pedestrianised, or accessible only for deliveries and emergency vehicles making for increased environmental quality, although more could be done to this space to improve the public realm to provide spaces that can be better used by pedestrians. Improvements could include providing more seating options, introducing planters, and areas that can be used by children to play.
- 4.86 However, peripheral areas of the Town Centre as you move away from the main retail core have a lower standard of environmental quality. This is as to be expected, as footfall in these areas is likely lower, however contrary to this, improvements to the public realm would potentially drive additional footfall to these areas. The main areas that would benefit from improvements are along Commercial Way, running along the southern boundary of Swansgate Shopping Centre, which currently has no active store frontages and limited street lighting and along Silver Street which would benefit from public realm that better mimics that along Midland Road (benches and planters).
- 4.87 The overall environmental quality in Wellingborough is good, however in all cases there is room for improvement. There is a need to 'green' the centre, to soften the hard landscapes dominated by concrete, which will in turn improve the environmental quality and visitors perception of the centre.

Perception of Safety

- 4.88 Like with the other centres, some work needs to be done to improve safety in Wellingborough. Due to the density of Wellingborough Town Centre, and its relationship with surrounding areas, there is a high amount of pedestrian activity around the centre. There is also a high amount of active ground floor uses around the centre. All of this provides a good standard of both natural and passive surveillance, that plays a part in improving the perception of safety.
- 4.89 In November 2022, 564 crimes were reported in the entire town of Wellingborough, with 83 of these being reported in the defined Town Centre. This is significantly down from the 137 crimes that were reported in November 2021.

Accessibility

- 4.90 As a key centre in North Northamptonshire, the centre is well related to surrounding settlements and has a good standard of accessibility by public transport, private vehicle and by foot, although to achieve this level of accessibility by bicycle will require infrastructure improvements. On our visit to the centre, limited cycle provision was noticed and there was very limited infrastructure for secure cycle parking. Given the proximity to the surrounding residential settlements, the town should be promoting cycling as a means of transport.
- 4.91 Another form of transport in the centre are Voi E-scooters, which offer town visitors access to electric scooters for £0.20 per minute as part of a national trial. As of now, they haven't been introduced at a wide scale, and cycle infrastructure improvements would also benefit these users.
- 4.92 The centre is widely accessible for pedestrians with generally wide pavements and large pedestrianised areas around the core. This provides an easy navigable space for people as they move around Wellingborough. There are also no significant barriers such as main roads, rivers or railway lines restricting pedestrian flows in and out of the town. Road crossing points were the main issue that arose from our visit, finding that the centre would benefit from more crossing points. There were a few crossing points that were insufficiently visible to pedestrians or drivers, which could be improved.
- 4.93 Wellingborough train station is located about a mile from the centre. Although the station is slightly removed from the Town Centre, it is still considered to be easily accessible from it. It was however identified that there is potential to enhance the link for cyclists and pedestrians to the station along Midland Road. Wellingborough station provides services to London St Pancras International, stopping at Bedford, Luton and Luton Airport on the way, as well as services to Corby and Melton Mowbray. It can be accessed by foot in around 15-20 minutes, and by the 48 bus route which stops nearby, although this service only runs hourly. There are opportunities to improve pedestrian and cycle accessibility along Midland Road. The centre is served by a number of other bus routes (such as W8, W1, W2, X46 Gold, X4 Gold and X47 Gold) which provide services to local destinations such as Bozeat and the wider Wellingborough area, as well as wider destinations in the region such as Kettering, Rushden, Northampton, Peterborough and Raunds. These services run with departures every 30 minutes to an hour depending on the route. Because of this, Wellingborough is considered to have a reasonably good standard of access to public transport.
- 4.94 Accessibility by private vehicle is good, with a large, recently refurbished, multi-storey car park providing 1000 spaces in the centre located at Swansgate Centre that is free of charge, and customer parking at Morrisons supermarket located to the west of the centre and at Aldi/ Matalan to the east of the centre. There is another large car park, Jackson's Lane Car Park, located just outside of the centre, that has 217 spaces and is free for two hours. The latter site is allocated for 'a predominantly residential scheme' under Policy TC 9 of the adopted Plan for the Borough of Wellingborough and is subject to planning permission WP/14/00175/FUL for 114 dwellings and

associated works). Nonetheless, on the day of our visit the Jackson's Lane Car Park represented another strategic location for Town Centre parking, allowing visitors to park in the area that best suited their reason for visiting the centre.

- 4.95 The overall accessibility of Wellingborough varies depending on your mode of transport into the centre. There is still a strong emphasis on access by private vehicle, given the lack of frequent public transport. To diverge from this, improvements to local bus routes, and investment into cycle infrastructure that promotes cycling into the centre is recommended.

Markets

- 4.96 A general market is held every Wednesday, Friday and Saturday, and a weekly bric a brac market is held every Tuesday. These markets are located on Orient Plaza by the side of Barclays Bank.

Public Opinion

- 4.97 Results from the household survey identified the top "likes" and "dislikes" of the Town Centre, as seen below.

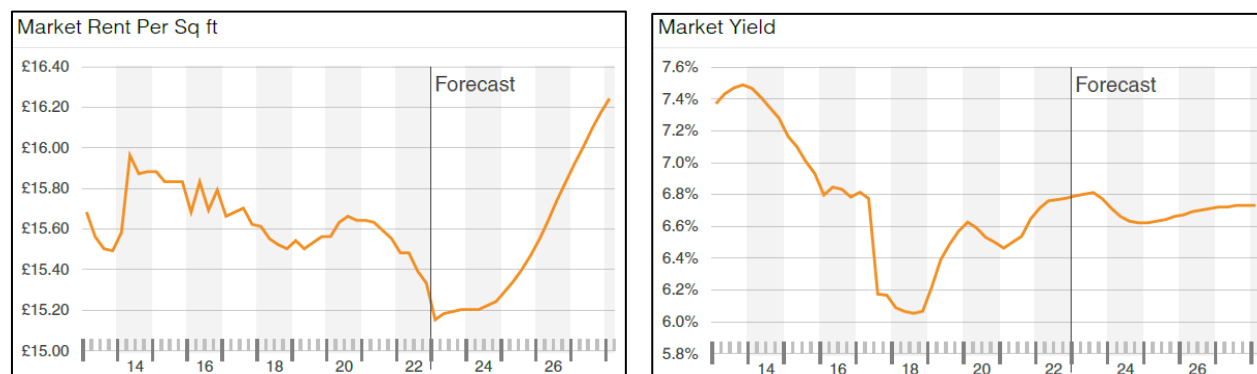
Wellingborough Town Centre Public Opinions



Prime Rents and Yields

- 4.98 The CoStar Retail Report 2023 identifies the market rent per square foot to be £15.18 and identifies that market yield in Wellingborough Town Centre is 6.8%.

Market Rent per SF and Market Yield for Wellingborough



Source: CoStar Retail Report 2023

Commercial Demand

- 4.99 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres.
- 4.100 We have identified nine operators that seek representation specifically in Wellingborough Town Centre. This is shown in the table below.

Table 4.100.1 Operator Requirement List for Wellingborough

Occupier	Description	Size (min) sq ft	Size (max) sq ft
Aldi	Supermarket	18,000	22,000
Co-op Funeralcare	Funeral Director	1,000	1,500
KFC	Fast Food Restaurant	1,800	3,500
Just for Pets	Pet Retailer	2,500	6,500
Monkey Puzzle Day Nurseries	Day Nursery	2,500	7,000
Optima Self Store	Self-Storage Unit	-	-
Poundstretcher	Retail Value Store	6,000	30,000
Savers	Discount Health & Beauty Retailer	2,000	3,500
Travelodge (Midlands)	Hotel	10,000	40,000

Source: The Requirement List (March 2023)

Conclusions

- 4.101 Wellingborough is the second largest centre in North Northamptonshire, both in terms of number of units and floorspace. The purpose built retail accommodation in Swansgate Shopping Centre has proved attractive for national multiples in the centre, however vacancy rates are a concern. The town centre has the potential to improve on its attractiveness as a retail centre, through investment to the environmental quality and homogenisation of shop fronts to add some more interest and vibrancy to the street scene.
- 4.102 Initiatives need to be implemented to diversify the offer of units in the centre to both re-let current vacant properties, and hopefully improvements to the centre's attractiveness will drive additional footfall to support new businesses. The centre would also benefit from diversification in the offering of units, aiming to attract more national retail and food operators, along with providing space to encourage the improvement of the night time economy in Wellingborough.

- 4.103 Like with the rest of North Northamptonshire, improvements need to be made to promote active modes of transport to the centre, most notably cycling. Given the proximity of the centre to the surrounding built area, and there being very few barriers for movement, promoting cycling would have widespread positive effects.

Rushden Town Centre

Description

- 4.104 Rushden is a medium-sized linear centre running north to south, and is the southernmost centre surveyed in North Northamptonshire. The centre has a blend of architectural styles, some of merit, but on the whole a lack of maintenance to these buildings and inconsistent facades means that their positive attributes to the street scape are not achieving their full potential.
- 4.105 In respect of the retail composition, Rushden is anchored by convenience goods operators, namely Lidl to the south of the centre and Asda to the north, and dominated by service operators. However, the largest single offering in Rushden is comparison stores.

Photos of High Street looking north in two locations (taken December 2022)



GOAD Composition and Vacancies

- 4.106 Rushden Town Centre is dominated by service operators, with 49.5% of operators being categorised as such. Leisure service operators are particularly well represented in Rushden, with 36 operators, accounting for 18.9% of all units, however this provision stands significantly less than the national average of 25.3%. Leisure service operators in Rushden mainly constitute fast food & take aways, with other repeated services including cafes, public houses and restaurants. All of the leisure services in Rushden, bar four, namely Costa Coffee and Betfred, BG Bet and Ladbrokes betting shops are independently run. In respect of the number of units in the centre, the retail service offer is strong, with 17.4% of units in the centre being classified as such and lies slightly above the national average of 15.8%. Likewise with leisure services, there are only two national multiples contributing to this figure, namely Specsavers and ASDA filling station. The retail service offering is dominated by beauty salons and hairdressers with 20 businesses.
- 4.107 Comparison retailers make up the largest percentage of one unit use in the centre, with 22.6% of units (total 43) classified as comparison. This figure stands slightly lower than the national average of 26.9%. The opening of the major out of centre shopping and retail complex located just over a mile away from Rushden Town Centre, Rushden Lakes, in 2017 has clearly had an impact on comparison stores in Rushden. Boots, Superdrug and Wilko

(the latter of which closed subsequent to our survey visit) were the only national multiples of comparison retailers in the centre at the time of our fieldwork, which looks to be unchanged from before the opening of Rushden Lakes. However, it can be seen that independent retailers have suffered in the centre and have been forced to close.

- 4.108 Convenience operators constitute the smallest proportion of the centre's composition, at only 10.5% of all units. 6 national multiples make up this figure, Greggs, Tesco Express, Timpson, ASDA, Iceland and Lidl, with the rest being independent retailers running mainly convenience stores and confectionary, tobacco and news stores. This offering is just above the national average of 9.3%.
- 4.109 At the time of our visit, 33 units in the centre were vacant, constituting 17.4% of the total composition. This figure stands higher than the current national average vacancy rate of 13.8%. However, the vacancy rate in respect of floorspace is below the national average of 13.8%, with only 11.9% of floorspace in the centre being vacant. This is to be expected, given the size of the units in the centre and there being no large vacant premises. The vacancy rate has likely been influenced by the impacts of the Covid-19 pandemic, along with people going to Rushden Lakes for national multiple retailers.
- 4.110 A vacant Pub, The Feathers, along High Street was under alteration at the time of our visit. Development of planning application number NE/22/00909/FUL comprising demolition of existing public house (class C4) and erection of three-storey building to a mixed-use consisting of 2-retail (class E), 2 offices (class E) & 10 two-bedroom apartments with associated access, car parking, refuse storage & landscaping was underway at the site, which will eventually provide two more retail units. Given the vacancy rate of the centre currently, this appears to be an inefficient use of the floorspace.
- 4.111 Since our visit, a large unit, the former Flutters Bingo Hall, which was once The Ritz Cinema on Alfred Street ceased trading and shut its doors in December 2022. Although the site is currently for sale, the local community have come together to create the Rushden Ritz Theatre Preservation group, with the plan to save the building to run it as a multi-use theatre, cinema, bingo hall and activity space. Since undertaking the healthcheck, it has been reported that The Ritz Cinema was successfully nominated as a community asset by Rushden Town Council indicating a positive future for the site.

Table 4.111.1 Rushden Town Centre Unit Composition at December 2022

Categories	Rushden 2011 (#)	Rushden 2011 (%)	Rushden 2022 (#)	Rushden 2022 (%)	UK Average 2022 (%)
Comparison	60	33.3%	43	22.6%	26.9%
Convenience	17	9.4%	20	10.5%	9.3%
Services (total)	67	37.2%	94	49.5%	49.8%
<i>Retail</i>	23	12.8%	33	17.4%	15.8%
<i>Leisure</i>	26	14.4%	36	18.9%	25.3%
<i>Financial & Business</i>	18	10%	25	13.2%	8.7%
Vacant	36	20%	33	17.4%	13.8%
Total	180	100%	190	100%	100%

Environmental Quality

- 4.112 Investment has been made in Rushden recently by installing street planters at points around the centre, although they are limited and the centre would benefit from more. There are benches around the centre, although again numbers are limited and the centre would benefit from more. Without the planters being installed, the centre would have had a relatively low level of environmental quality.
- 4.113 Where there are no obstructions from vehicles, there are even and wide pavements around the centre, making for safe routes for pedestrians. However, the centre would benefit from some more crossing points. Along High Street, crossing points are indistinct, and do not give pedestrians right of way. Although traffic is only moving one way, pedestrians would benefit from easier crossing options, particularly for disabled pedestrians, or parents with small children.
- 4.114 Unit facades in the centre could benefit from improvement to make them more characterful, improvements that would add to the overall quality of the public realm in the centre. Improvements to the public realm would increase the vibrancy of the centre in turn attracting more visitors and new businesses to occupy the centre.

Perception of Safety

- 4.115 Rushden is considered to be one of the safest medium sized centres in Northamptonshire. In November 2022, 76 crimes were reported within the Town Centre boundary. This figure is up from 49 crimes reported in November 2021. At our time of visit, the centre did feel safe with retail units lining both sides of High Street, along with not coming across any noticeable areas that were tucked away with no natural surveillance.
- 4.116 There is on street parking on High Street, although there was a high number of cars parked on double yellow lines and on the pavement. The designated parking spaces do not interfere with the pavement, but in some areas cars parked on the pavement meant that pedestrians had to go onto the road to get around them which detracts from the overall perception of pedestrian safety. This being said, traffic does move slowly and is already restricted to being one way, although pedestrians should not be expected to walk on the road as the pavement is blocked.

Accessibility

- 4.117 Rushden Town Centre is mainly accessed by private vehicle, as the nearest train station is in Wellingborough. It is not at a walkable distance and takes around 44 minutes to get there by bus. Bus services serve the north and the south of the centre, and include the routes 25, 50, X46 gold, X47 gold and VL13. These routes provide more local services to Northampton, Wellingborough, Raunds, Higham Ferrers and Sharnbrook and there is also a wider regional service to Bedford.
- 4.118 Rushden Town Centre is the only large town centre in North Northamptonshire without a train station, which will have potential implications for the scale of future growth in the centre.
- 4.119 The centre has a number of large, short-stay surface level car parks that are all free of charge. John Street car park is located to the south of the centre, and Orchard Place car park is to the north. There is also a long stay car park along Duck Street that has a more central location in respect to the town, and this is also free of charge. Some residents have commented using google reviews that the free parking in Rushden is one of the only reasons they consider going to the centre now.
- 4.120 Rushden Town Centre has a large built up area surrounding it, and there are no major barriers restricting access to the centre. This being said, there is a noticeable lack of cycle infrastructure in the centre. There was no cycle parking evident at our time of visit, nor any cycle lanes. However, there was a Voi electric scooter hire station. The

use of electric scooters in the centre would also benefit from cycle infrastructure, as it will improve the safety for riders.

Markets

4.121 There was no evidence of markets being held in Rushden at the time of our study.

Public Opinion

4.122 Results from the household survey identified the top “likes” and “dislikes” of the Town Centre, as seen below.

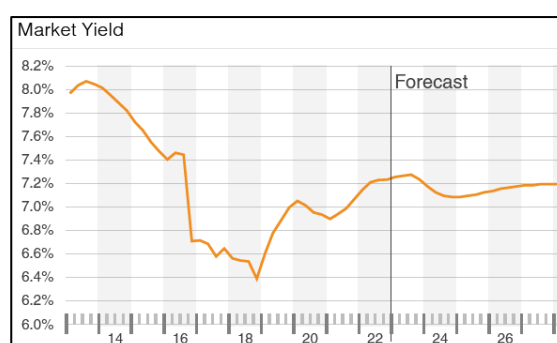
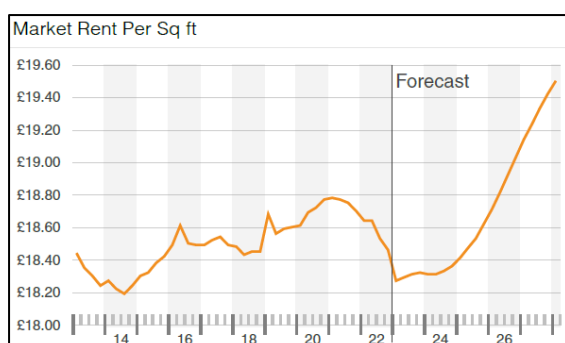
Rushden Town Centre Public Opinions



Prime Rents and Yields

4.123 The CoStar Retail Report 2023 identifies the market rent per square foot to be £18.31 and identifies that market yield in Rushden Town Centre is 7.2%

Market Rent per SF and Market Yield for Rushden



Source: CoStar Retail Report 2023

Commercial Demand

4.124 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres.

- 4.125 We have identified eight operators that seek representation specifically in Rushden Town Centre. This is shown in the table below.

Table 4.125.1 Operator Requirement List for Rushden

	Description	Size (min) sq ft	Size (max) sq ft
Afrikana	African Inspired Restaurant	2,000	3,000
Aldi	Supermarket	18,000	22,000
German Donor Kebab	Donor Kebabs, Sandwiches and Burger Restaurant	1,300	2,500
Formula One Autocentres	Car Servicing	4,500	7,000
Lidl	Supermarket	18,000	26,000
MaxiSaver	Discount retailer	2,500	6,000
Pizza Hut Delivery	Pizza Delivery	650	2,100
Sense	Charity	1,200	6,000

Source: The Requirement List (March 2023)

Conclusions

- 4.126 Rushden is a reasonably attractive retail destination whose offer was dominated by independent retail, leisure and other service operators even before the development of Rushden Lakes, and which continues to provide for a range of predominantly non-multiples. Nexus' separate Rushden Lakes Shopping Centre Impact Assessment of April 2024 highlights that the failure of Rushden Town Centre to attract new national multiple operators since 2010, particularly in the comparison sector, partly reflects wider trends such as the impacts of Covid-19 and broader changes to the high street retail function of town centres seen over the past decade and beyond.
- 4.127 Nonetheless, it is clear that the centre has suffered as a result of the opening of Rushden Lakes, evident in the percentage of vacant units. It is unlikely the centre will attract national multiples in the future as operators look more towards Rushden Lakes, although improvements to the public realm and environmental quality in the centre could play a part in attracting new, and diverse independent retailers, ensuring the offering of unit uses does not conflict with what is on offer at Rushden Lakes.

Desborough Town Centre

Description

- 4.128 The former industrial town of Desborough is located to the north west of the study area, and is small in size, comprising just 50 retail units. The centre spans north east to south west covering a relatively large area, especially given the low number of units. To the north of the centre there is a large Co-op supermarket which backs onto the manufacturing and sales area of Albany Shed Company.
- 4.129 The centre has one of the highest vacancy rates of all centres, with 20% of units being empty at the time of our visit. Given the location of the centre, it is unlikely it has been impacted from the opening of Rushden Lakes, and wider market trends and the impact of Covid-19 are likely to have played a part in businesses closing.

Photos of Station Road looking north east, and the junction of Station Road and High Street looking south west (taken December 2022)



GOAD Composition and Vacancies

- 4.130 Desborough Town Centre consists of 50 units, with the highest proportion of one unit being leisure services. In the centre there are 16 units classified as leisure services, half of these units operating as fast food & take aways. These 16 units make up 32% of the overall composition of the centre, which is above the national average of 25.3%. There is one pub in the centre, The George as well as a bar, but only two units suggests that Desborough doesn't have a strong night time economy. The next highest offering in the centre is retail services, comprising 9 units, making up a total of 18% of the overall composition. All bar one, an opticians, are either hairdressers or beauty salons, indicating a saturation of this business type in Desborough. This figure is again below the national average, which is 15.8%.
- 4.131 There are 8 comparison units in the centre, making up 16% of the total composition. This figure is significantly lower than the national average of 26.9%. Of these units there are no national multiples, but on the most part there is a good variety of store types. The centre has only 3 convenience stores, comprising just 6% of the total unit composition. Surprisingly, within this mix there are 2 Co-op supermarkets, one larger than the other and found on opposite sides of the centre. After seeing some centres losing small supermarkets, it is surprising there is enough trade to support both of these units. The offer of convenience stores is below the national average. Since we conducted our healthcheck of Desborough, an out of centre Sainsburys has opened up along Harborough Road.
- 4.132 At our time of visit, there were 10 vacant units in Desborough, comprising 20% of all units. This figure stands higher than the national average of 13.8%, suggesting that initiatives need to be implemented to reduce this figure and also diversify the mix of units in the centre. There were no areas with a higher density of vacancies, with units spread around the entire centre.

Table 4.132.1 Desborough Town Centre Unit Composition at December 2022

Categories	Desborough (#)	Desborough (%)	UK Average 2022 (%)
Comparison	8	16.0%	26.9%
Convenience	3	6.0%	9.3%
Services (total)	29	58.0%	49.8%
Retail	9	18.0%	15.8%
Leisure	16	32.0%	25.3%
Financial & Business	4	8.0%	8.7%
Vacant	10	20.0%	13.8%
Total	50	100.0%	100.0%

Environmental Quality

- 4.133 In some aspects, Desborough has a high level of environmental quality, with areas of trees, planters and benches throughout the centre. Although it is likely that this has been improved due to the residential nature of this centre. On the junction of Station and Havelock Road, there is a public square, which has grassed areas, along with benches and trees have been planted. The provision here would set a good precedent for ideas that could be incorporated throughout the centre. Given the amount of dwellings in the centre, encouraging places for residents to meet should be a priority as spaces as such enhance the sense of community.
- 4.134 The industrial heritage of the centre is evident throughout, with low rise red brick buildings dating back to Victorian times, although in places, redevelopment and infill developments have not been sympathetic to this style and have ended up fragmenting the streetscape. In places where this has happened, improvements to façade designs would help to better incorporate these buildings into the centre and improve the sense of place.

Perception of Safety

- 4.135 17 crimes were reported in Desborough in November 2022, which is significantly up from just 7 that were reported in November 2021. It is unclear what has caused crimes to increase so drastically in the centre. There is a good level of natural surveillance across the centre, made so by active frontages from either unit frontages or private dwellings. The centre had a good amount of street lighting, although some areas would benefit from a few additional lights and there were also CCTV cameras visible along Station Road, being the main road through the centre.

Accessibility

- 4.136 Desborough is the western most centre of those studied in North Northamptonshire, which also means that it is relatively isolated in the sense of public transport. It is located centrally between Market Harborough, Corby and Kettering. The route 18 bus runs from Station Road in Desborough to Market Harborough Station. Kettering station can also be accessed hourly on the route 19 bus, also taking around half an hour by bus.
- 4.137 Given that Desborough is not the most accessible by public transport, visitors are likely going to use private vehicles to access the centre. This being said, there is only a limited provision of parking in the centre with some free spaces at the north in the Co-op carpark, along with another small car park, 10 Mansfield Close parking, just south of here. Spaces are available on the roads around the centre, although they are only free for half an hour. It would be recommended that more parking provisions can be offered in Desborough, to attract more visitors.
- 4.138 Around the centre, there is a high level of provision of wide even pavements, making for safe walking routes, although there is a need for more crossing points. One location in need of more crossings is around the Co-op to

the north of the centre, as currently there is no safe access from there into the wider centre without having to cross roads at the junction of a roundabout.

- 4.139 Despite the size of the town, there were a good amount of signs for pedestrians, indicating routes to get to prominent places such as the Council Offices or the Post Office.

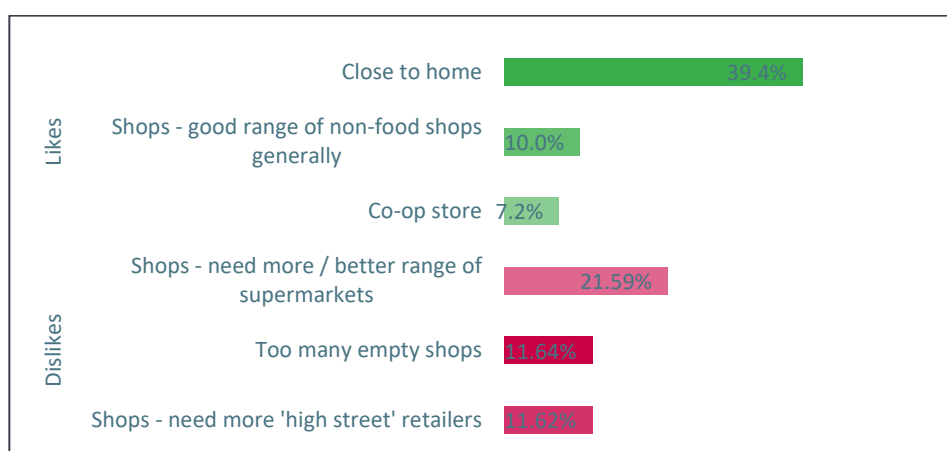
Markets

- 4.140 There was no evidence of markets being held at Desborough at the time of our study.

Public Opinion

- 4.141 Results from the household survey identified the top “likes” and “dislikes” of the Town Centre, as seen below.

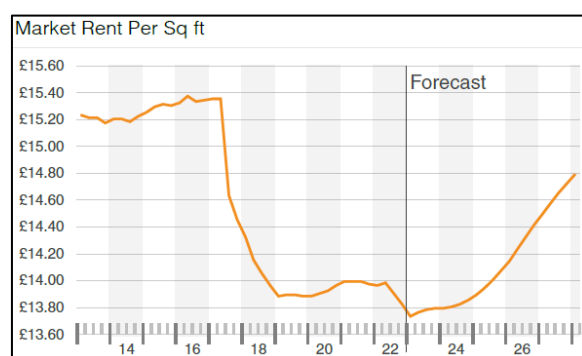
Desborough Town Centre Public Opinions



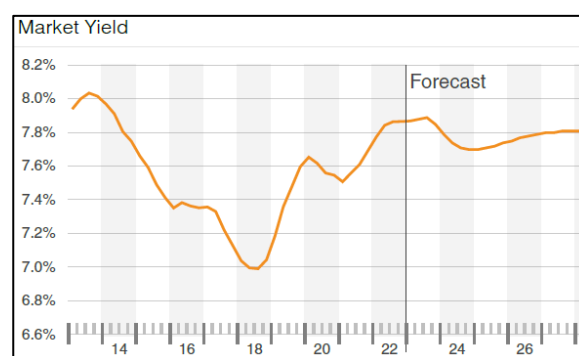
Prime Rents and Yields

- 4.142 The CoStar Retail Report 2023 identifies the market rent per square foot to be £13.76 and identifies that market yield in Desborough Town Centre is 7.9%

Market Rent per SF and Market Yield for Desborough



Source: CoStar Retail Report 2023



Commercial Demand

- 4.143 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres.

- 4.144 We have identified two operators that seek representation specifically in Desborough. This is shown in the table below.

Table 4.144.1 Operator Requirement List for Desborough

Occupier	Description	Size (min) sq ft	Size (max) sq ft
Aldi	Supermarket	18,000	22,000
Lidl	Supermarket	18,000	26,000

Source: The Requirement List (March 2023)

Conclusions

- 4.145 The small size, and local nature of Desborough, means that it has the potential to offer a unique experience for visitors. However the current mix of units as well as vacancies in the centre identified at the time of our survey create a perception that it has little to offer visitors. The reoccupying of vacant units should be a priority, and initiatives should be implemented to attract more comparison units to the centre. In this regard, we note that comments made by Councillors during the preparation of this report suggest that the number of vacancies in Desborough has declined considerably since the time of our fieldwork, which is an encouraging sign.
- 4.146 Desborough would also hugely benefit from some additional crossing points, particularly to the north outside the Co-op to provide safe access for pedestrians into the centre. Whilst aiming to reoccupy units in the centre, it should be understood if the parking provisions in the centre are currently coping and if more needs to be done to enhance provisions. Unless there is adequate parking in the centre, new businesses are unlikely to survive without the footfall.

Burton Latimer Town Centre

Description

- 4.147 Burton Latimer is a small town located between Kettering and Wellingborough. Town Centre uses are concentrated in a linear fashion along the High Street and curving around Kettering Road in the north.
- 4.148 Two convenience stores, Sainsbury's and One Stop, which both cover a large floorspace, provide essential goods to Burton Latimer's residents. Scattered around these are a large number of leisure and retail uses which boost the centre's offer.

Photos of Buurton Latimer (taken December 2022)



GOAD Composition and Vacancies

- 4.149 Burton Latimer has a high number of retail service units when compared to the national average; up 12 percentage points. Of the 13 in the centre, 7 of them are health & beauty services, with 6 being hairdressers or beauty salons or a combination between the two; the other is a natural therapy service. Other retail services include 2 electrical repair shops, a car repair centre, an optician and a dry cleaner.
- 4.150 Likewise, Burton Latimer has a high number of leisure service units- up 9% from the UK average. However, the offer is not very diverse, with 7 out of the 16 units being fast food & takeaways. From these 7, 3 are pizza takeaways and 3 are Indian takeaways. The rest of the leisure offer consists of 3 cafes, 3 restaurants, a public house, a betting office and a social club.
- 4.151 Most notably, the centre has a shortage of comparison units (10.6%) when compared to the national average (26.9%). Between these units there are 4 different uses: a charity shop, car sales, a newsagent and a clothing shop. It is assumed that the close proximity of the centre to both Wellingborough and Kettering means that residents of Burton Latimer travel elsewhere for comparison goods.
- 4.152 Though there is a healthy amount of units categorised as financial and business services (5), there are only two uses of these, with 3 estate agents and 2 building supplies/ services.
- 4.153 Finally, the centre is well provided for in terms of convenience goods. There is one large Sainsbury's, two convenience stores and a confectionery/biscuit store which all provide local needs.
- 4.154 The vacancy rate in Burton Latimer of 8.5%, which is just over 5% lower than the UK national rate, does not seem to be a cause of concern.

Table 4.154.1 Burton Latimer Town Centre Unit Composition at December 2022

Categories	Burton Latimer (#)	Burton Latimer (%)	UK Average 2022 (%)
Comparison	5	10.6%	26.9%
Convenience	4	8.5%	9.3%
Services (total)	34	72.3%	49.8%
Retail	13	27.7%	15.8%
Leisure	16	34.0%	25.3%
Financial & Business	5	10.6%	8.7%
Vacant	4	8.5%	13.8%
Total	47	100.0%	100.0%

Environmental Quality

- 4.155 Burton Latimer has a mix of building types with a handful of Grade II listed buildings along the High Street, with some units featuring thatched roofs and stone walls, around more recent, post war development. This range in architecture creates a visual liveliness which adds to the centres aesthetic.
- 4.156 The infrastructure in the centre is decent with 3 traffic-light crossings across the High Street providing frequent crossings and connecting the two sides of the road. There are few trees planted across the High Street, however, green spaces do provide a refreshing break in the built form. This is particularly noticeable with Millennium Garden, on the intersection with Churchill Way. The area around this intersection is pleasant, with street furniture concentrated in this area and wide pavements. Moving away from Millennium Garden, pavements are relatively narrow but are seemingly in good condition and unobstructed.

Perception of Safety

- 4.157 In November 2022, 9 crimes were reported in Burton Latimer Town Centre. This is just one higher than the 8 crimes reported in November 2021. This suggests that the centre is very safe, and no changing factors are influencing crimes in the centre.
- 4.158 The crime rate in Burton Latimer (according to [crimerate.co.uk](https://www.crimerate.co.uk)) in 2022 was 57 crimes per 1,000 people. Although this covers the entire town of Burton Latimer, including the residential areas, and a majority of crimes occurred out of the Town Centre boundary.

Accessibility

- 4.159 Given the position of Burton Latimer, both Kettering and Wellingborough Railway Stations can be accessed, by car, in just over 10 minutes. However, reaching these stations by public transport takes much longer, with Kettering Station approximately 30 minutes away and Wellingborough Station approximately 40 minutes away by bus.
- 4.160 Bus routes provide comprehensive cover of the Town Centre. Route numbers 50, 276 and 48 service four different stops: Newman Street, Orbit Mews, Meeting Lane and Churchill Way. These routes serve destinations such as Wellingborough, Finedon, Kettering and Rushden.
- 4.161 Parking provision is ample around Burton Latimer Town Centre. In fact, there are three large car parks around the centre, on Churchill Way, Church Street and outside Sainsbury's. Between these there are circa 150 free spaces, although the Sainsbury's Car Park has a 2 hour stay limit. Aside from these, there is a healthy provision of on-street parking, particularly outside the units on Churchill Way.
- 4.162 In regards to provision for cyclists, there are Sheffield stands located outside the Band Club, on the High Street, and on Churchill Way. Additionally, there is availability of Voi e-scooters in Burton Latimer as part of a district wide scheme, however their presence and use was not observed at the time of visiting.

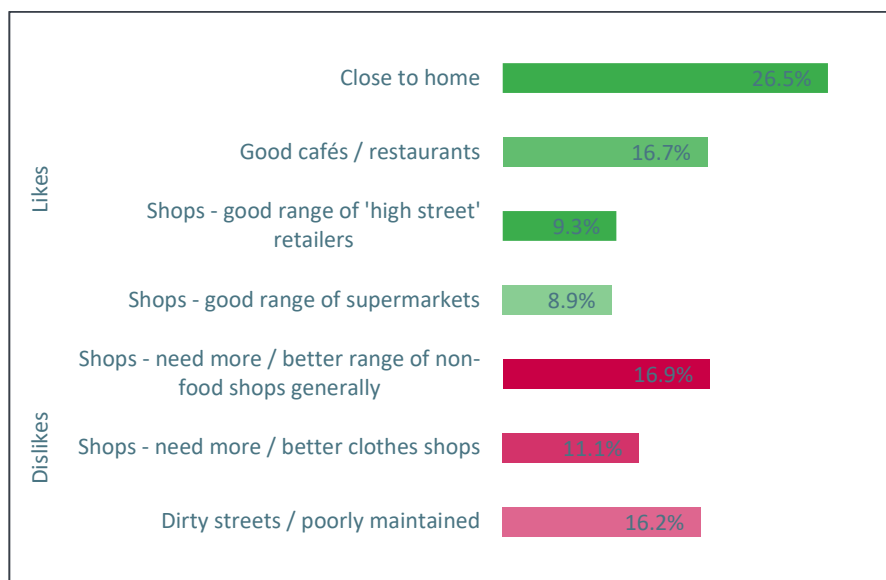
Markets

- 4.163 Burton Latimer Town Centre hosts a farmers market on the first Saturday of each month at Millennium Gardens - selling local produce, artisan goods and gifts.

Public Opinion

- 4.164 Results from the household survey identified the top "likes" and "dislikes" of the Town Centre, as seen below.

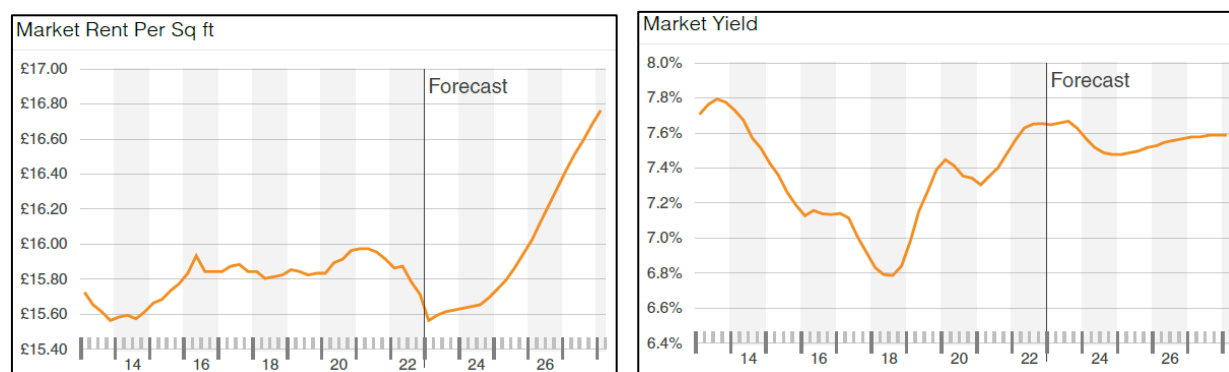
Burton Latimer Town Centre Public Opinions



Prime Rents and Yields

- 4.165 The CoStar Retail Report 2023 identifies the market rent per square foot to be £15.59 and identifies that market yield in Burton Latimer Town Centre is 7.6%.

Figure 4.21: Market Rent per SF and Market Yield for Burton Latimer



Source: CoStar Retail Report 2023

Commercial Demand

- 4.166 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres.
- 4.167 We have identified one operator that seeks representation specifically in Burton Latimer Town Centre. This is shown in the table below.

Table 4.167.1 Operator Requirement List for Burton Latimer

Occupier	Description	Size (min) sq ft	Size (max) sq ft
Aldi	Supermarket	18,000	22,000

Source: The Requirement List (March 2023)

Conclusions

- 4.168 Burton Latimer is a pleasant centre due to its general aesthetic, low vacancy rate, easy accessibility by car and low crime. Additionally, the centre has a proportionally large number of leisure uses.
- 4.169 However, we assume that the centre does depend on its proximity to Kettering and Wellingborough due to the low number of comparison goods units. Also, the range of leisure uses could be varied to provide a more comprehensive leisure offer.

Higham Ferrers Town Centre

Description

- 4.170 The historic market town of Higham Ferrers is located just north of Rushden, and is one of the two smallest centres as part of this study, alongside Burton Latimer. With just 4 vacant units, and one of the lowest vacancy rates, the characterful town and small retail units have made for a level of vibrancy and attraction that has not significantly suffered from the opening of Rushden Lakes a mile away. The centre is located within Higham Ferrers Conservation Area, meaning its character has been designated for protection and enhancement. Within the conservation area, a vast majority of buildings have received listed status. The vibrancy of Higham Ferrers, with it being a small centre with close proximity to Rushden Lakes is something that should be looked to, especially from other small towns in the area that are struggling to attract people and businesses.

Photos of College Street looking south (taken December 2022), and Market Square looking east (taken by Google October 2018)



GOAD Composition and Vacancies

- 4.171 The unit composition in Higham Ferrers is dominated by leisure services, with this offering making up 29.8% of all units. This total is above the national average of 25.3%. The 14 leisure service units in the centre have a good range. There are four pubs, namely The Green Dragon, The Carriage House, The Griffin Inn and The Queens Head located at various points along High Street that leads north into College Street. All of these restaurants offer dining too. Alongside these pubs, Higham Ferrers has a range of cafes and take away restaurants suggesting a strong night time economy for a town its size. Given the centre's location to Rushden Lakes, Leisure Services are highly viable in a centre this size.
- 4.172 Comparison stores are the next strongest provision in the centre, with the 11 stores comprising 23.4% of the overall composition. This does come in just below the national average of 26.9%, however it is still a very strong

offer given the proximity to the large comparison store centre that is Rushden Lakes. The comparison stores in Higham Ferrers are all independent, with no national multiples and there is no repetition of store types within the mix. There is also a higher than average number of retail services in the centre, with 9 units that make up 19.1% of the composition, a number higher than the national average of 15.8%. These units are dominated by hairdressers and beauty salons, which does saturate the offer, although is a viable business in a centre like this to diversify what is available.

- 4.173 There are 7 convenience stores in Higham Ferrers, making up 14.9% of all units in the Town Centre, a figure that is again above the national average of 9.3%. These units are all independent besides the small Co-op that is located along High Street.
- 4.174 Overall, given the proximity of Higham Ferrers to Rushden Lakes, there is no evidence that this centre has suffered as a result of it opening. Due to the small local nature of the centre, the more high-end independent businesses have retained customers and also driven new premises to be occupied with similar styles of business.
- 4.175 Higham Ferrers has a vacancy rate of 8.5%, made up of just 4 vacant units. This rate of vacancy stands well below the national average of 13.8% indicating that the town is thriving as a small commercial centre. The vacant units are all small in size, and it is unlikely much would need to be done to encourage the reoccupation of them soon.

Table 4.175.1 Higham Ferrers Town Centre Unit Composition at December 2022

Categories	Higham Ferrers (#)	Higham Ferrers (%)	UK Average 2022 (%)
Comparison	11	23.4%	26.9%
Convenience	7	14.9%	9.3%
Services (total)	25	53.2%	49.8%
<i>Retail</i>	9	19.1%	15.8%
<i>Leisure</i>	14	29.8%	25.3%
<i>Financial & Business</i>	2	4.3%	8.7%
Vacant	4	8.5%	13.8%
Total	47	100.0%	100.0%

Environmental Quality

- 4.176 Higham Ferrers is one of the most attractive centres in the study area, alongside Oundle, characterised by low rise developments that are on the most part built from a light sand coloured stone. The centre is protected by Higham Ferrers conservation area, which covers a high number of listed buildings throughout the centre including the Grade I listed Church of St Mary along with a majority of store fronts, along with their upper floors being Grade II listed. The facades throughout the centre are sympathetic to the character of the area, and enhance the overall sense of place. Although, as you move south through the centre, some more modern developments have occurred, which although aren't in the same type of stone, have connected to the existing buildings with both their façade types and heights and do not significantly detract from the overall streetscape.
- 4.177 Higham Ferrers Town Centre has streets lined with trees, with this being one of the only centres where this occurs across the entire area. Some facades include hanging baskets, and this could be one idea to improve the overall environmental quality but this is not necessary.
- 4.178 Street furniture can be found in places, although the centre would benefit from more street furniture, mainly benches across the entire area.

Perception of Safety

- 4.179 In November 2022, 19 crimes were reported in Higham Ferrers, although 12 of these crimes were reported as shoplifting with a focus around the Co-op on High Street. This is significantly up from the 8 crimes reported in November 2021. The crime rate in Higham Ferrers is surprising as it comes in higher than similar sized towns in North Northamptonshire.
- 4.180 The compact nature of the centre and high occupancy rates makes for a good level of natural surveillance from the active frontages. The centre has limited street lighting, which is an improvement that would be beneficial to the night-time safety of the centre and no council run CCTV cameras were spotted.

Accessibility

- 4.181 The unique character of Higham Ferrers suggests that it likely attracts a lot of weekend and seasonal visitors, indicating a high rate of private vehicle use to access the centre. This being said, there are only limited parking provisions, mainly around the former Market Square where there is a limited number of spaces. Parking here is free for 2 hours. A second car park can also be found towards the north of the centre, located between College Street and Saffron Road. The Saffron Road public car park is free of charge, but is again small. Some parking spaces are also available along High Street, that are free for either an hour or two, but the provisions are likely to be insufficient at busy times.
- 4.182 Wellingborough Station is the closest station to Higham Ferrers, being just over five miles away, although it is not readily accessible by public transport. The X47 gold bus route provides a service to Wellingborough Station, although it only runs hourly and the journey takes in total 55 minutes, which includes a 15 minute walk to the station. This bus route also provides hourly services to Northampton and Raunds. Higham Ferrers has one other bus route that runs through it, the number 50, which provides services to Bedford, Rushden and Kettering that run approximately hourly.
- 4.183 There is availability of Voi e-scooters in Higham Ferrers as part of a district wide scheme. However their presence and use was not observed at the time of visiting.
- 4.184 Despite the historic nature of the centre, the footpaths are on the most part wide and even in surface. The centre will however benefit from improved crossing points as only two points were observed that were both managed by traffic lights.

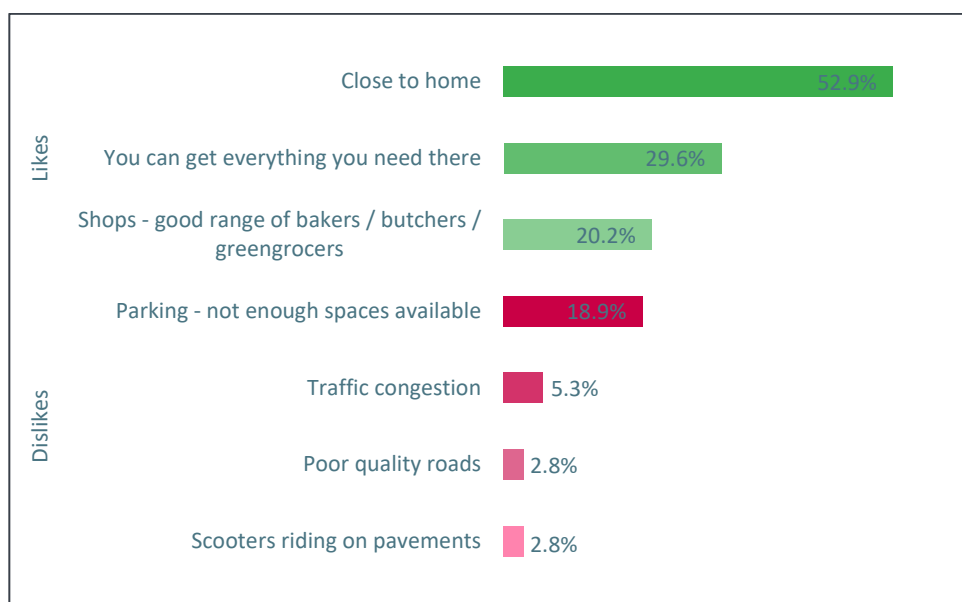
Markets

- 4.185 Higham Ferrers also has a monthly farmers market that sells a wide range of local produce, held in the historic market square on the last Saturday of the month, with the exception of December, where it is moved to the last Saturday before Christmas. This means that parking here is suspended, and it is unclear where these cars could park as there are limited amounts of other spaces.

Public Opinion

- 4.186 Results from the household survey identified the top “likes” and “dislikes” of the Town Centre, as seen below.

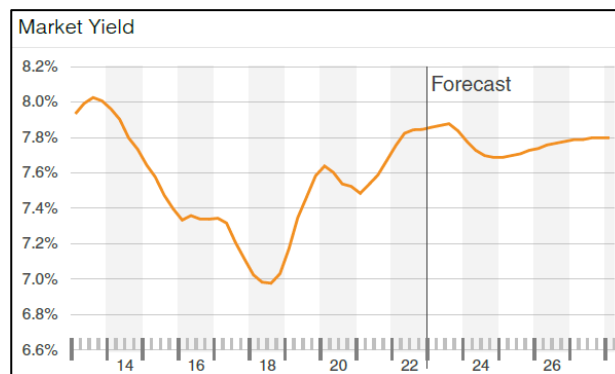
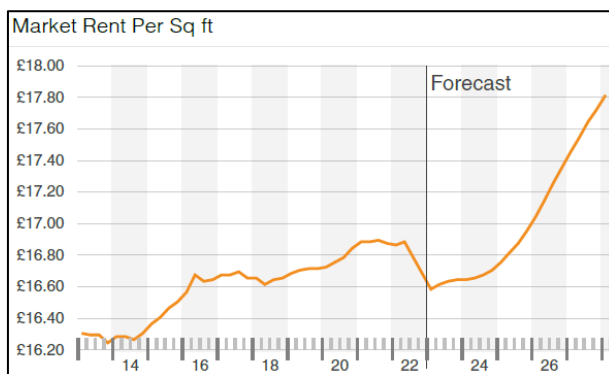
Higham Ferrers Town Centre Public Opinions



Prime Rents and Yields

- 4.187 The CoStar Retail Report 2023 identifies the market rent per square foot to be £16.62 and identifies that market yield in Higham Ferrers is 7.8%

Market Rent per SF and Market Yield for Higham Ferrers



Source: CoStar Retail Report 2023

Commercial Demand

- 4.188 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres. There are no operators that seek representation specifically in Higham Ferrers.

Conclusions

- 4.189 Higham Ferrers is one of the most characterful centres of the study, made possible by its high level of environmental quality. Given its proximity to Rushden Lakes, the centre provides an excellent example of the type of unit offerings that are needed to create a vibrant economy in the smaller centres. Parking provisions likely require improvement, however this could only be confirmed once assessing if there are any issues at peak times.

Irthlingborough Town Centre

Description

- 4.190 Located just north of Rushden and Higham Ferrers, Irthlingborough is the second smallest Town Centre of those surveyed, with just 48 units. The centre predominantly runs north east along High Street across a roundabout onto Station Road, with a few additional units along Finedon Road that runs north west from the roundabout and Church Street that runs south west. Due to redevelopment over time, the character of Irthlingborough has been lost, leaving the centre having little architectural merit.
- 4.191 Despite being such a small centre there is a high vacancy rate in Irthlingborough, with 20.8% of units being classified as such at the time of our visit. There is an unusually large concentration of large vacant units in the centre of the town around the former Tesco Express that closed in January 2022. Around these vacancies, the centre is dominated by retail and leisure services.

Photos of High Street looking south west, and High Street looking south (taken December 2022)



GOAD Composition and Vacancies

- 4.192 In Irthlingborough there are only 7 comparison stores, making up just 14.6% of the total unit composition. This total lies over 10% lower than the national average of 26.9%, and is likely a figure that has been directly impacted by the opening of Rushden Lakes. Of these comparison stores, there are no national multiples, although this appears to have been the case prior to the opening of Rushden Lakes with the centre historically being dominated by independent retailers. The number of convenience stores in the centre also lies below national average, with just 3 being open at the time of our visit. This equates to 6.3% of the units in the centre, compared to the national average of 9.3%. Of the convenience stores, there is a medium sized Co-op in the centre, located at the north east boundary. There is also an out of centre Aldi in Irthlingborough, located just under a mile away from the centre along Station Road. It is likely that this store opening had an impact on Tesco's business, resulting in its closure.
- 4.193 The centre is dominated by retail and leisure services, evenly making up 50% of the total composition. The 12 retail services, comprising 25% of units, means that the offering of such businesses in Irthlingborough is well above the national average of 15.8%. Half of the retail services in the centre are either hairdressers or beauty salons, although this being said there is a good range of business offerings. There were also 12 leisure services in the centre at the time of our visit. Of this offer there was one pub, The Artlenock Inn, along with 6 fast food and take away restaurants. This suggests that there is a limited night time economy in Irthlingborough.

- 4.194 The opening of Rushden Lakes has likely impacted the footfall in the centre, as previous users choose to visit this out of centre retail park which has a diverse offer of goods. For Irthlingborough to thrive, more needs to be done to attract independent retailers that offer a unique range of services and products.
- 4.195 Given the size of the centre, there is a higher than average vacancy rate. At the time of our visit, 10 units, making up 20.8% of the overall composition were vacant. This figure stands higher than the national average of 13.8%. Of the vacant units in the centre, there are two large stores, namely the former Tesco Express, and large former Select & Save supermarket and off licence that is located directly opposite the former Tesco on High Street.
- 4.196 Given the other supermarkets both in the centre (Co-op), and out of centre (Lidl) along with further supermarkets located at Rushden Lakes, it is unlikely that these units, given their size, will be successfully occupied again.

Table 4.196.1 Irthlingborough Town Centre Unit Composition at December 2022

Categories	Irthlingborough (#)	Irthlingborough (%)	UK Average 2022 (%)
Comparison	7	14.6%	26.9%
Convenience	3	6.3%	9.3%
Services (total)	28	58.3%	49.8%
Retail	12	25.0%	15.8%
Leisure	12	25.0%	25.3%
Financial & Business	4	8.3%	8.7%
Vacant	10	20.8%	13.8%
Total	48	100.0%	100.0%

Environmental Quality

- 4.197 Compared to other centres of the study, Irthlingborough has a high level of environmental quality in the natural sense. As you move south west down High Street, there is a small public garden in the centre, offering a tranquil escape for visitors. The garden has benches and pathways throughout, although has to be accessed by two steps meaning it is not somewhere those with mobility issues could access. This is one of the only centres of the study area that has green space within the centre boundary, and the improvements to the environmental quality are profoundly noticeable. There is also another small garden area, Parsons Green, on the corner of Finedon Street and High Street, with paths providing access through the area, along with benches. As well as these parks, there are trees, planters and benches along High Street around places that have wide paved areas. Although this greenery does not extend throughout the entire centre, and the addition of small planters and hanging baskets throughout would enhance the sense of place. More benches would also be beneficial throughout the centre.
- 4.198 Due to redevelopment over time, a centre with fragmented nature and no homogenisation has been created. Some older buildings remain, with some distinct characteristics, although the more modern developments detract from this. Façade improvements throughout would improve on this, as well as initiatives such as art installations on large vacant units to better blend the streetscape.

Perception of Safety

- 4.199 In November 2022, 12 crimes were reported in Irthlingborough Town Centre. At places in the centre, the stores provide a good level of natural surveillance, although the high levels of vacancies in a centre so small detracts from this, leaving spaces that have no active frontages, either in the sense of units being occupied or the land having other uses.
- 4.200 The centre does have a high amount of street lighting throughout, meaning that it is well lit once the sun has set, and council installed CCTV cameras were noticed in places providing passive surveillance in the centre.

Accessibility

- 4.201 Irthlingborough Town Centre is located centrally in the medium sized town of Irthlingborough. Buses run through the centre, meaning large areas of the wider town are not accessible by bus, particularly for those with disabilities. The bus routes 45, 48 and 50 stop at various points along High Street and Station Road providing services to Rushden, Kettering, Wellingborough and Bedford, amongst other smaller village locations. On the most part, all of these services run hourly, which is generally a lower frequency in comparison to other centres of the study area. Wellingborough station is the nearest train station to Irthlingborough. Located a little over 3 miles away, it takes just 19 minutes to get there from the centre on the route 48 bus. Although the bus service only runs hourly, it is a quick and feasible option to access the station that provides services north to Corby, and south to St Pancras International, London.
- 4.202 At the time of our visit, it appeared that the centre was predominantly accessed by private vehicles. However, parking is limited with a small car park at the Co-op, and another medium sized car park, Church Street Car Park, the opposite side of the road. Both of these car parks are free, although they are located to the north east of the centre with no other car parks throughout the centre. Church Street car park was reaching full capacity at the time of our visit, first thing in the morning as stores were opening. Parking is also available along High Street and is free for an hour, with disabled spaces in a central area, but again these spaces were on the most part full at the time of our visit. If the centre had full occupancy, it is likely that parking provisions would not be plentiful to meet demand.
- 4.203 There is a high density of residential dwellings surrounding Irthlingborough, and it appeared all main access points into the centre were well paved. There were crossing points in places, particularly around the roundabout, and they provided easy and safe access throughout the centre. Although there was no crossing point noticed along Station Road, particularly as you move down it from the roundabout, and this road would benefit from one to create safe access into the centre.

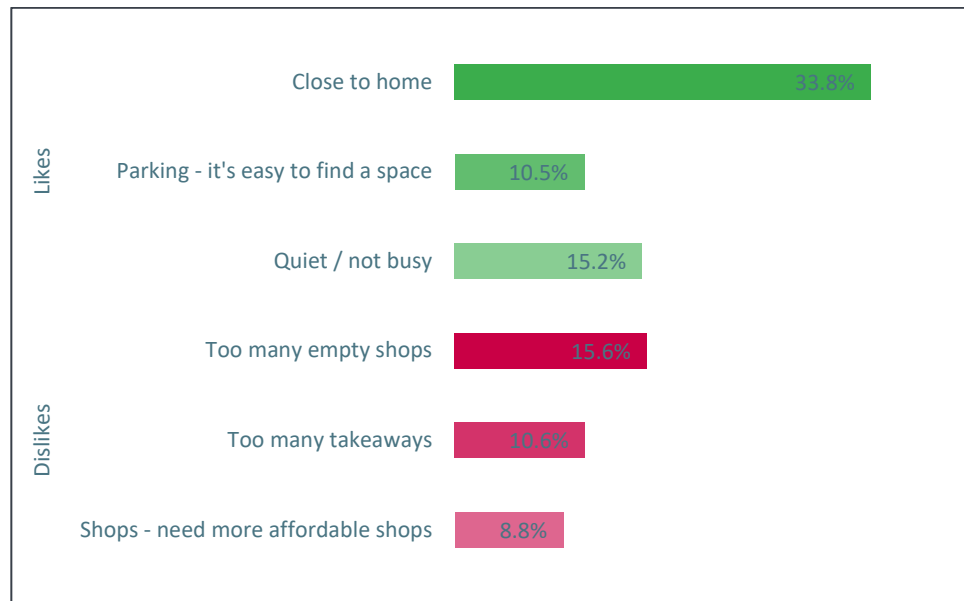
Markets

- 4.204 On the first Saturday of March through to December, a market is held on Parsons Green, located on the corner of Finedon Road and High Street. This market specialises in handmade and artisan gifts. There is also occasionally a Fruit and Veg stall held here, although it is infrequent and would not attract regular businesses. According to online reviews, local residents would also welcome a farmers market to start running in the centre, as other Market Towns in the area do, although there is no evidence that something like this is set to start operating.

Public Opinion

- 4.205 Results from the household survey identified the top “likes” and “dislikes” of the Town Centre, as seen below.

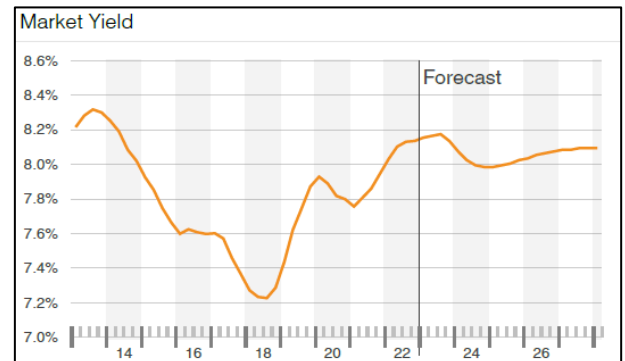
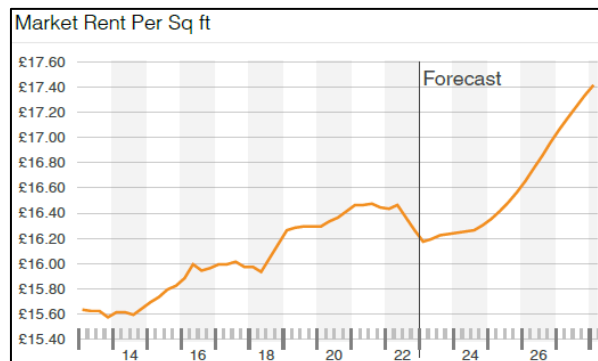
Irthlingborough Town Centre Public Opinions



Prime Rents and Yields

- 4.206 The CoStar Retail Report 2023 identifies the market rent per square foot to be £16.20 and identifies that market yield in Irthlingborough Town Centre is 8.1%

Market Rent per SF and Market Yield for Irthlingborough



Source: CoStar Retail Report 2023

Commercial Demand

- 4.207 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres.
- 4.208 We have identified two operators that seek representation specifically in Irthlingborough Town Centre. This is shown in the table below.

Table 4.208.1 Operator Requirement List for Irthlingborough

Occupier	Description	Size (min) sq ft	Size (max) sq ft
Domino's Pizza	American Pizza Restaurant Chain	950	1500
Monkey Puzzle Day Nurseries	Day Nursery	2,500	7,000

Source: The Requirement List (March 2023)

Conclusions

- 4.209 The size of the centre leaves the potential for Irthlingborough to attract a better range of shops, ensuring the offering is entirely different to what can be found at Rushden Lakes, however initiatives need to be brought into place to make this possible. The large vacant units on High Street would benefit from improvements, such as divisions to make for more appropriate sized units, and potentially renting them at lower rates for a while to initially attract the businesses. Reducing the vacancy rate in the centre will also play a part in creating more active frontages, in turn reducing crime.
- 4.210 Of all the centres, Irthlingborough has a very high amount of managed public green space, with provisions that should set a precedent for other centres as a use for brownfield sites to improve their overall environmental quality.

Oundle Town Centre

Description

- 4.211 The historic market town of Oundle is a small centre located to the north east of the North Northamptonshire area. The centre runs in a linear fashion east to west and is of a high standard of environmental quality due to the use of Oundle Stone throughout the centre making for a centre full of architecturally attractive buildings and characterful shopfronts. Although there is a road running through the centre, traffic was not an issue at all at the time of visit suggesting it is only used by local traffic and is not a through road.

Photos of Oundle town centre (taken December 2022)



- 4.212 In respect of the retail composition in Oundle, the centre has a Co-op supermarket to the eastern boundary and has a high offering of comparison units in respect to other uses. These comparison units are not dominated by national multiples, with a large percentage of units being independent retailers that are not repeated multiple times throughout the centre.

GOAD Composition and Vacancies

- 4.213 31.9% of the units in Oundle were used for comparison purposes at our time of visit, a figure that stands well above the national average of 26.9%. Of this figure there was only one national multiple, Boots, with the other units being independent retailers or charity shops. There is almost an equal offering of retail services and leisure services in the centre, comprising 19.4% and 18.1% of units respectively. Retail services in the centre stand well

above the national average of 15.8% whilst the leisure services in Oundle are below the national average which is currently 25.3%.

- 4.214 There are 7 convenience stores in Oundle, making up 9.7% of the units. Of this figure, there are two national multiples including a Co-op and a small Tesco Express. This figure does stand lower than the national average, however given the size of the centre this is not a worry. There is also an out of centre Waitrose & Partners, located just beyond the north east boundary of the centre.
- 4.215 In Oundle, 11.1% of units are classified as financial and business services, a figure standing above the national average of 6.6%. Although, of this figure, there is only one bank that is only open three days a week (Monday, Thursday, Friday) between 9:30-2:30. Alongside the bank, there is a post office in Oundle located inside Oundle Pharmacy that is open Monday-Friday and offers basic banking opportunities, however it is likely people will have to travel further afield to access banking services.
- 4.216 7 units, making up 9.7% of all units in Oundle were vacant at the time of our visit. Positively, this figure stands lower than the national average which is currently 13.8%. In terms of vacant floorspace, 9.5% of the total floorspace in Oundle is vacant, again a figure lower than the national average of 13.8%. Vacant units are evenly distributed around the centre, although one noticeable vacant unit is the former Natwest bank on Market Place that has been vacant since June 2018.
- 4.217 Since our visit to Oundle, it has been announced that the Barclays Bank in the centre will be closing in May 2023 which will then leave the centre having no bank.

Table 4.217.1 Oundle Town Centre Unit Composition at December 2022

Categories	Oundle (#)	Oundle (%)	UK Average 2022 (%)
Comparison	23	31.9%	26.9%
Convenience	7	9.7%	9.3%
Services (total)	35	48.6%	49.8%
<i>Retail</i>	14	19.4%	15.8%
<i>Leisure</i>	13	18.1%	25.3%
<i>Financial & Business</i>	8	11.1%	8.7%
Vacant	7	9.7%	13.8%
Total	72	100.0%	100.0%

Environmental Quality

- 4.218 Of all the centres surveyed, Oundle has one of the highest levels of environmental quality. This is down to the homogenous use of Oundle Stone throughout the centre. Oundle Stone is a pale grey variety of Blisworth Limestone that has a relatively coarse texture. All of the buildings in the centre have been built from this stone, including alterations and extensions to the historic built form, making for an attractive centre of strong architectural merit. Because of this, the centre lies within Oundle Conservation area, and a vast majority of the buildings are listed at either Grade I, II or II*.
- 4.219 A majority of frontages are in keeping with the centre, although in a few instances frontages would benefit from improvements to increase the overall attractiveness of the ground floor streetscape in Oundle.
- 4.220 The public realm in Oundle is good given the limited public space in the centre, however it would benefit from overall improvements. This could come from adding hanging baskets, street planters and benches in more places. One feature that was noticeable was the incorporation of bicycle parking into street planters at various points around the centre. Making dual use of public realm provisions makes for an effective use of space, and heightens attractiveness.

Perception of Safety

- 4.221 At the time of our visit, Oundle Town Centre felt exceptionally safe and secure. Retail units line Market Place and West Street, leading into residential areas at either end. All of these uses provide a high level of natural surveillance for pedestrians. Street lighting could however be improved, as lights were irregular.
- 4.222 In terms of crime, only 3 crimes were reported in Oundle Town Centre in November 2022. This figure is the same as the number of reported crimes in 2021, suggesting the centre is an extremely safe place to live and visit.

Accessibility

- 4.223 Oundle Town Centre is served by only one bus route, X4 Gold, running through the centre. This route provides approximately hourly services to Peterborough, Wellingborough, Northampton and Corby. Oundle is not located near a train station, with the nearest one being Corby, just over 10 miles away. It is accessible using the X4 Gold bus.
- 4.224 Oundle is highly accessible for private vehicles, with a large free car park located at the Co-op to the east of the centre, along with there being on street parking that is free for two hours. There is also parking around Market Place, although this is closed on Thursdays to make way for the market. The centre itself is surrounded by a moderate density of residential areas, and at the time of our visit, it did not appear that there were issues with the level of parking provisions in the centre.
- 4.225 Due to the historic nature of the centre, in a lot of areas the pavements were not that wide but they were evenly surfaced, although there were no other restrictions meaning that passing for wheelchair users or those pushing prams is still possible. Although there were not high levels of vehicular movement through the centre at the time of our visit, we cannot assume that is the case all the time. There were only two pedestrian crossings along Market Place/ West Street, a number that should be increased to improve pedestrian safety.
- 4.226 There is a moderate density of built up area immediately around the centre, however it did not seem as if they had direct access to the centre due to no through roads or foot paths. This is something that could be improved to encourage more trips to the centre by foot, for those who live nearby but with no direct route in.
- 4.227 This proximity also suggests that improvements to cycle infrastructure would be beneficial. There were no cycle lanes in the centre, and also very limited parking opportunities for bikes suggesting that it is not a popular method for accessing Oundle Town Centre.

Markets

- 4.228 In Oundle, there is a weekly Thursday market on Market Place outside the Old Town Hall selling fresh local produce, fish, comparison and artisan goods. The market was running at our time of visit and had a steady level of footfall walking through it and buying from the market stalls.

Public Opinion

- 4.229 Results from the household survey identified the top “likes” and “dislikes” of the Town Centre, as seen below.

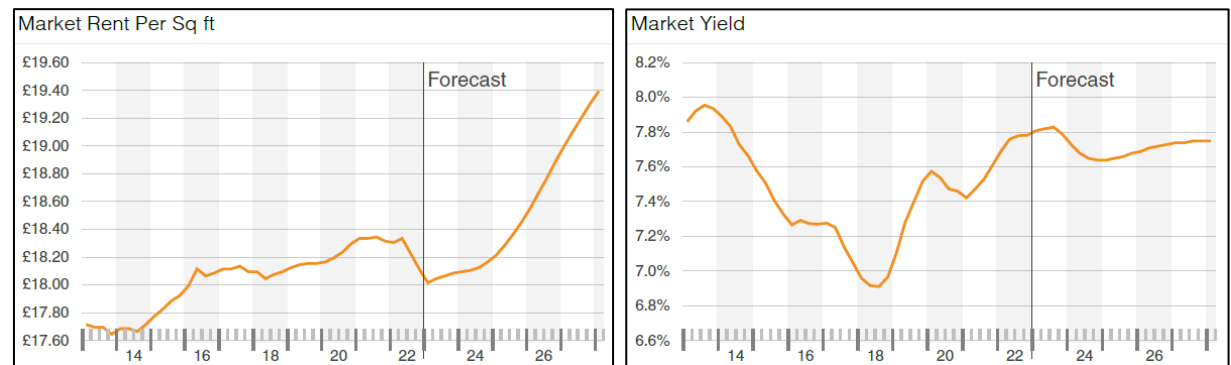
Oundle Town Centre Public Opinions



Prime Rents and Yields

- 4.230 The CoStar Retail Report 2023 identifies the market rent per square foot to be £18.04 and identifies that market yield in Oundle Town Centre is 7.8%

Market Rent per SF and Market Yield for Oundle



Source: CoStar Retail Report 2023

Commercial Demand

- 4.231 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres.
- 4.232 We have identified one operator that seeks representation specifically in Oundle Town Centre. This is shown in the table below.

Table 4.232.1 Operator Requirement List for Oundle

Occupier	Description	Size (min) sq ft	Size (max) sq ft
Toolstation	Tools & Building Supplier	2,750	6,000

Source: The Requirement List (March 2023)

Conclusions

- 4.233 Oundle is a particularly attractive centre in North Northamptonshire, with a high level of architectural merit that has made for a distinctly characterised centre. The centre has a lower than average vacancy rate, with a majority of units occupied by independent retailers, with very few repetitions of business classes. Although it is attractive in character, it does not present an attractive provision of public transport meaning that accessibility is limited to private vehicles. Although, at the time of our visit, this did not appear to be a problem.

Raunds Town Centre

Description

- 4.234 For one of the smaller centres studied, Raunds Town Centre covers a very large area. Running north, from the old market square, to south down High Street and Brook Street, there are 58 commercial units in the centre, arranged in small irregular clusters, infilled by other land uses. The centres offering is local in nature, with uses dominated by retail services, although there is a relatively high rate of vacancies given the size of the centre.

Photos of Market Square looking north, and Brook Street looking north (taken December 2022)



- 4.235 The fragmented nature of the centre, due to infill developments over time, has led to a centre being created that has little to no architectural merit, meaning that there is a limited sense of place in the centre. Although, of all the centres, Raunds is the only Town Centre that has a park within the boundary. Although small, and offering limited public amenity besides benches, the park can be accessed off Brook Street, just north of Shelmerdine Rise.

GOAD Composition and Vacancies

- 4.236 Of the 58 units in Raunds, the most common unit type is retail services, comprising 18 units which equates to 31% of the centre being classed as such. This figure stands at almost double the national average for retail service, which is 15.8%. Although a high offering of retail services, they are highly repetitive in terms of business type with 12 of the 18 either being beauty salons or hairdressers.
- 4.237 The national average for comparison units in centres is 26.9%. In Raunds, the percentage of comparison units is significantly lower than this at just 17.2%, equating to just 10 units. Of this total, there are no national multiples. The number of convenience stores is however above the national average of 9.3%, as the 7 units in Raunds make up 12.1% of the overall unit composition. Amongst this figure, there are three national multiples, namely Co-op,

Greggs and Spar. The Co-op in Raunds is located at the southern boundary of the centre, and has a wide variety of goods. Raunds also has a large, out of centre Asda supermarket, located to the north west of the centre.

- 4.238 Raunds also has a large offering of leisure services, with 13 units, comprising 22.4% of the unit composition. This figure is well above the national average of 15.8%. This figure is dominated by fast food & take aways as well as restaurants that offer take away services too. All of these businesses are independent. There are also two pubs in Raunds, along with a bar suggesting that the centre has a reasonable night time economy.
- 4.239 A total of 8 units in Raunds were vacant at the time of survey, making up 13.8% of all units. This figure is equal to the national average, meaning that the vacancy rates are not a cause of concern. However, given the size of the centre, more should be done to try and attract businesses to fill these units, with the hopes of also diversifying the offering in Raunds as there is a large local population for these units to serve.

Table 4.239.1 Raunds Town Centre Unit Composition at December 2022

Categories	Raunds (#)	Raunds (%)	UK Average 2022 (%)
Comparison	10	17.2%	26.9%
Convenience	7	12.1%	9.3%
Services (total)	33	56.9%	49.8%
Retail	18	31.0%	15.8%
Leisure	13	22.4%	25.3%
Financial & Business	2	3.4%	8.7%
Vacant	8	13.8%	13.8%
Total	58	100.0%	100.0%

Environmental Quality

- 4.240 The fragmented nature of the centre, caused by infill developments and redevelopment has meant that there is no homogenisation of architectural styles in Raunds, with each block of units having different (to varying extents) characteristics. This leads into frontages, which have also suffered because of this. The different periods of buildings in the centre means that facades are often reflective of the building they are a part of. Improvements, and the introduction of standards to the store fronts would be a good solution to improving the streetscape of the centre.
- 4.241 Of all the centres, Raunds was one of the most green places, with trees, hedgerows and a small park within the centre. This has been made possible due to the fragmentation of units, and there being a low density rate. This being said, there is still room for improvement such as adding hanging baskets and planters in more open parts of the town to extend the feeling of green throughout. One place that would benefit from improvements is the old town square, which does have some greenery in the form of trees, but still has large open concreted areas that would be softened by more foliage.
- 4.242 Street furniture is provided in places around the centre, with the largest proportion being around the old market square. These provisions are something that would benefit from being introduced moving south through the centre, especially given the large area in which the units are found.

Perception of Safety

- 4.243 In November 2022, only 9 crimes were reported in Raunds. This is significantly up from the 3 reported in November 2021. It is unclear what has caused this spike in crimes, however during our visit the fragmented nature of the centre and inconsistent active frontages was noted.

Accessibility

- 4.244 As the crow flies, the nearest station to Raunds is Wellingborough Station, although accessing it by public transport is a challenge as the quickest route goes via Kettering, making Kettering station the most accessible. The X47 gold route runs through Raunds, providing on average hourly services to Higham Ferrers, Rushden, Wellingborough and Northampton and evening services to Higham Ferrers, Rushden and Wellingborough.
- 4.245 The route 16 bus also serves Raunds, and provides a direct route to Kettering station from the bus shelter on Market Square in Raunds, although buses run infrequently, between every 2 to 4 hours.
- 4.246 Besides the route 16 bus, the X47 gold route also runs through Raunds, providing on average hourly services to Higham Ferrers, Rushden, Wellingborough and Northampton and evening services to Higham Ferrers, Rushden and Wellingborough.
- 4.247 Although one of the main ways to access Raunds is by private vehicle, there is limited parking in the centre. There are two car parks to the north of the centre, namely Market Square Car Park and Raunds Car Park, both of which are free of charge, but are small in size. Street parking is also available for free throughout the centre, with timings ranging from 1 hour to 2 hours.
- 4.248 Raunds is very well situated, in the middle of a large residential area, however active transport methods, such as walking and cycling are not well supported. Throughout the centre there were only a few cycle racks, in odd locations, and no cycle paths suggesting that cycling is not encouraged. Foot paths are on the most part good, although in areas they would benefit from being widened to provide safe access for all pedestrians, and parking on the pavement needs to be restricted as this was noticed to be a problem at the time of our visit. There are however a good number of crossing points that prioritise pedestrians (zebra crossings) around the old town square, although the addition of a few more would be beneficial given the extent of the centre. Moving south from the old market square, along Brook Street is the stretch of the centre where crossing improvements would be beneficial.

Vacancies

- 4.249 A total of 8 units in Raunds were vacant at the time of survey, making up 13.8% of all units. This figure is equal to the national average, meaning that the vacancy rates are not a cause of concern. However, given the size of the centre, more should be done to try and attract businesses to fill these units, with the hopes of also diversifying the offering in Raunds as there is a large local population for these units to serve.

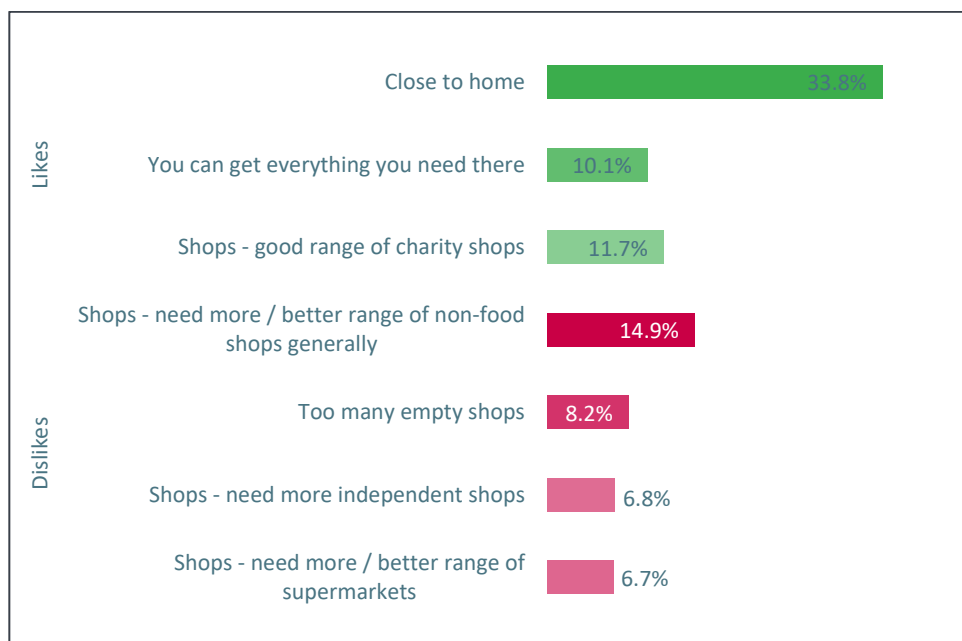
Markets

- 4.250 Despite not historically being a market town, Raunds has a weekly market that is held in the Town Square between 9:30-1 selling fresh local produce, fruit and veg, hot drinks and cakes. There is also a market held on the third Saturday of every month between April to September, offering a wider range of stalls as well as entertainment for children.

Public Opinion

- 4.251 Results from the household survey identified the top “likes” and “dislikes” of the Town Centre, as seen below.

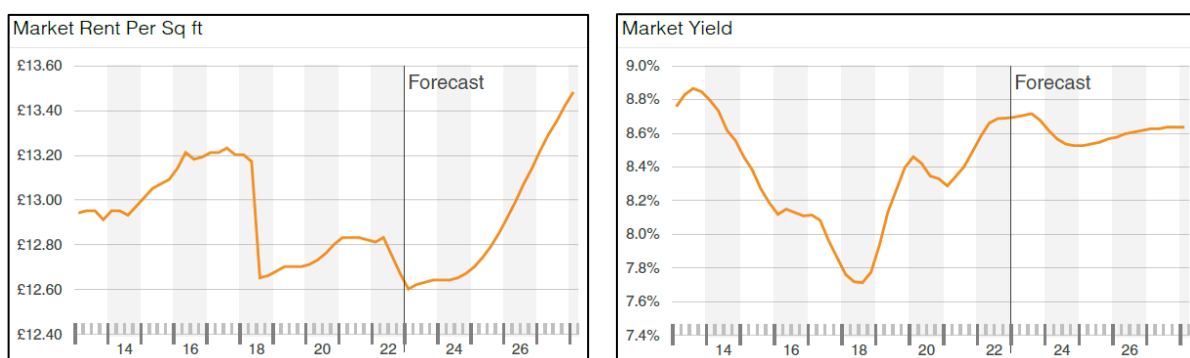
Raunds Town Centre Public Opinions



Prime Rents and Yields

- 4.252 The CoStar Retail Report 2023 identifies the market rent per square foot to be £12.63 and identifies that market yield in Raunds Town Centre is 8.7%.

Market Rent per SF and Market Yield for Raunds



Source: CoStar Retail Report 2023

Commercial Demand

- 4.253 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres.
- 4.254 We have identified one operator that seeks representation specifically in Raunds Town Centre. This is shown in the table below.

Table 4.254.1 Operator Requirement List for Raunds

Occupier	Description	Size (min) sq ft	Size (max) sq ft
Aldi	Supermarket	18,000	22,000

Source: The Requirement List (March 2023)

Conclusions

- 4.255 Although Raunds is a small centre, serving a reasonably large local community, the centre is lacking a diverse offering of businesses with high concentrations of hairdressers, beauty salons and restaurants/take aways. With a number of vacant units, initiatives to improve the offer of comparison stores would play a part in creating a more vibrant centre.
- 4.256 Raunds is also highly dispersed as centres go, with irregular clusters of units, making for limited homogenisation in façade design. This is something that would benefit from improvement, so as visitors move between units, they still experience a sense of place, feeling as if they are in Raunds.

Rothwell Town Centre

Description

- 4.257 Rothwell Town Centre is a local centre, approximately 5 miles north of Kettering. The Town Centre uses are concentrated around the intersection between B576 and Bridge Street and extends over Market Hill & Bell Hill.
- 4.258 The centre serves Rothwell's immediate population. The Town Centre is anchored by two supermarkets, Co-op and Tesco Express and decorated by a number of leisure uses. The architecture of the centre reveal the town's rich history, particularly The Market House- to the rear of which is a vast market space for the community.

Photos of Bridge Street looking west, and Market Square looking south (taken December 2022)



GOAD Composition and Vacancies

- 4.259 The centre is dominated by leisure and retail uses. Whilst the amount of leisure uses are in line with national averages, the amount of retail service units in the centre does exceed them. In fact, the centre has 15 retail service units, which make up 23.4% of the total offer, standing over 7% higher than the national average. Of these units, 12 are classified as 'health and beauty', with 8 hairdressers and 3 beauty salons- the rest being a post office, a tattoo parlour, a dog groomer and an optician.
- 4.260 Another anomaly in the units composition statistics is the lack of comparison units. The centre has 12 comparison units in total which are 18.8% of its total offer, a small provision when compared to the national average of 26.9%, reflecting the centre's current purpose of serving the immediate, residential population. However, the comparison offer is diverse with 9 different uses ranging from art supplies to charity shops.

- 4.261 Leisure uses make up the majority of the uses in the centre (26.6%). Of these uses there are 6 fast food & takeaways, 5 restaurants and 4 public houses. The remaining provision consists of a hotel, a coffee shop and a social club.
- 4.262 Financial & Business Services are fairly consistent with national averages, with the provision in the centre consisting of 4 estate agents, a building society, a building merchant and a bank. Likewise, the convenience offer is healthy and diverse with two supermarkets, a bakery, a butcher shop, a tobacconist and an off licence.
- 4.263 The centre's vacancy rate does not appear to be a cause for concern. Though we do not have accurate floorspace measurements, the rate of units currently vacant (10.9%) is comfortably lower than the national average (13.8%).

Table 4.263.1 Rothwell Town Centre Unit Composition at December 2022

Categories	Rothwell (#)	Rothwell (%)	UK Average 2022 (%)
Comparison	12	18.8%	26.9%
Convenience	6	9.4%	9.3%
Services (total)	39	60.9%	49.8%
<i>Retail</i>	15	23.4%	15.8%
<i>Leisure</i>	17	26.6%	25.3%
<i>Financial & Business</i>	7	10.9%	8.7%
Vacant	7	10.9%	13.8%
Total	64	100.0%	100.0%

Environmental Quality

- 4.264 Rothwell Town Centre provides a high quality environment for the pedestrian. This is particularly through the historic architecture of its buildings, many of which are listed, such as The Market House. A couple of the units have active frontages which adds to the open and welcoming feel of the centre.
- 4.265 Infrastructure in the centre is relatively good. There are 4, well-maintained, zebra crossing points, which provide easy connection to the two sides of the main shopping street. Litter does not seem to be an issue, probably by virtue of the many bins which line the streets.
- 4.266 However, the already slim footpaths can be narrowed at times where cars have mounted the pavement which does reduce access to pedestrians, particularly those using mobility scooters. In addition to this, there is not much green infrastructure in the centre, though this is not thought to be a cause for concern, when considering the size of adjacent green spaces: Manor Park and Rothwell Recreation Ground.

Perception of Safety

- 4.267 In November 2022, 9 crimes were reported in Rothwell, which is significantly up from 3 that were reported in November 2021. According to crimerate.co.uk in December 2022, Rothwell's crime rate was 74 crimes per 1,000 people; 12% lower than the average Northamptonshire rate of 85 per 1,000 people. The hotspot for crime in 2022 was Bridge Street, which saw 14 incidents.

Accessibility

- 4.268 The closest station to Rothwell Town Centre is Kettering Station which is a nine-minute drive away but is approximately 30 minutes away by public transport.
- 4.269 The centre is well serviced by bus routes, particularly at 'Market Hill' bus stop in the centre which is served by the number 18 bus. Additionally, service numbers 17A and 19 pass by the centre on the B576, stopping at 'War

Memorial' which is within the Town Centre. These services provide links to Kettering, Corby, Desborough and Market Harborough.

4.270 The centre is highly accessible by car. In the middle of the centre is the 'Market Hill Car Park' which is free and always accessible, except for during market times, with space for circa 80 vehicles. There is also ample on-street parking provision, particularly on Bridge Street.

4.271 Cycle provision is limited, with a handful of Sheffield stands situated outside Tesco Express.

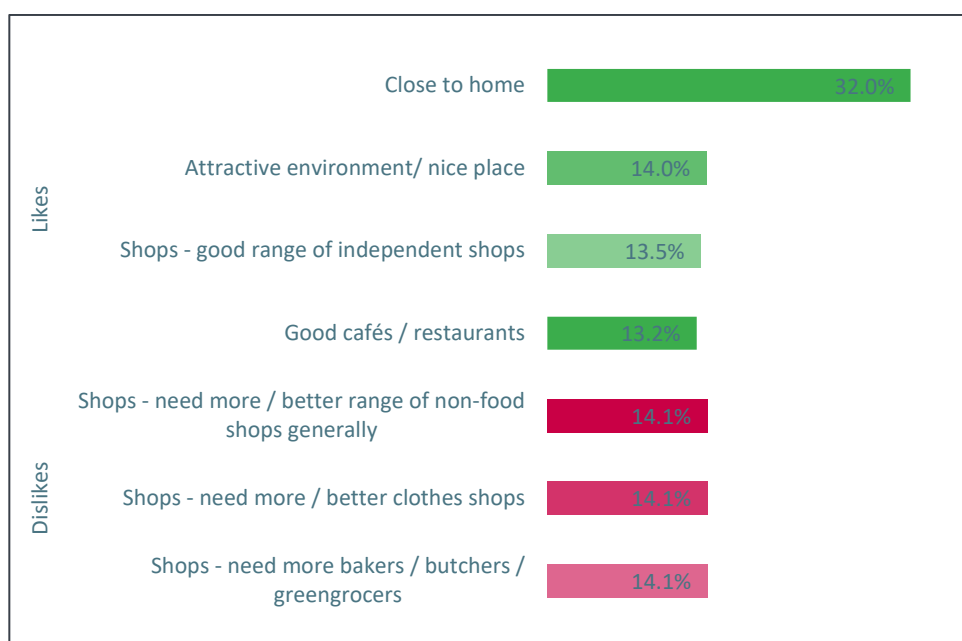
Markets

4.272 Rothwell Town Centre has a weekly market on Mondays and one on every third Saturday of each month, selling local produce and artisan goods.

Public Opinion

4.273 Results from the household survey identified the top "likes" and "dislikes" of the Town Centre, as seen below.

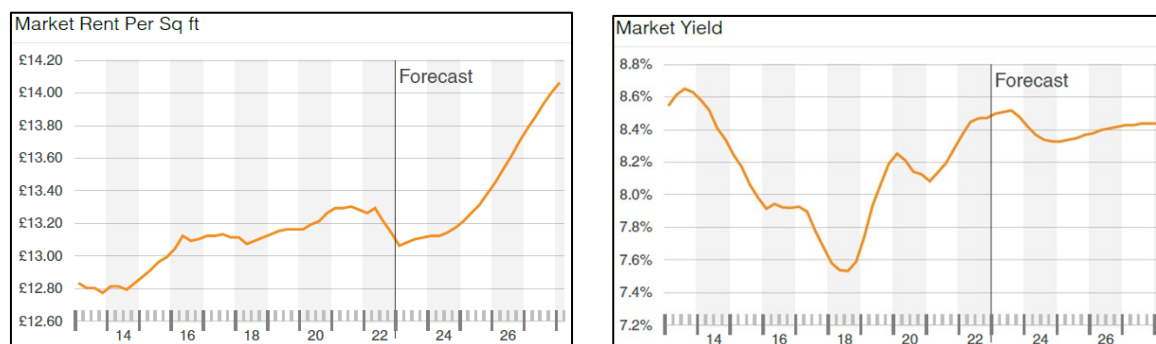
Rothwell Town Centre Public Opinions



Prime Rents and Yields

4.274 The CoStar Retail Report 2023 identifies the market rent per square foot to be £13.08 and identifies that market yield in Rothwell Town Centre is 8.5%

Market Rent per SF and Market Yield for Rothwell



Source: CoStar Retail Report 2023

Commercial Demand

- 4.275 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres.
- 4.276 We have identified two operators that seek representation specifically in Rothwell Town Centre. This is shown in the table below.

Table 4.276.1 Operator Requirement List for Rothwell

Occupier	Description	Size (min) sq ft	Size (max) sq ft
Aldi	Supermarket	18,000	22,000
Lidl	Supermarket	18,000	26,000

Source: The Requirement List (March 2023)

Conclusions

- 4.277 Rothwell Town Centre, as a centre serving its immediate local population, carries out its function well. The centre has a range of convenience uses and is accessible by bus routes. Additionally, the active frontages and frequent markets give a community feel and sense of vibrancy in the centre.
- 4.278 However, pedestrian infrastructure and measures to reduce the crime rate could be pursued.

Thrapston Town Centre

Description

- 4.279 The historic market town of Thrapston is one of the smaller centres of the area with only 55 units, located to the east of the surveyed area of North Northamptonshire. On the whole the centre is of architectural merit, however in places, unsympathetic modern developments detract from this character. The centre is located west of the largely residential area of Thrapston.
- 4.280 In respect of the retail composition in Thrapston, the centre has a large Co-op supermarket located on the eastern boundary of the centre, and also has the lowest vacancy rate of all the centres we surveyed, with only one unit being vacant at our time of visit. This suggests that the size of the centre, and its offering meets the needs of the local community.

Photos of High Street looking west, and Chancery Lane looking north (taken December 2022)



GOAD Composition and Vacancies

- 4.281 Although only having a small offering of units, Thrapston has an excellent mix of businesses. The highest percentage of shops are comparison, with the 15 units making up 27.3% of the total composition in Thrapston. This figure is marginally above the national average of 26.9%. Of these units, none are national multiples, and there is little repetition of business offerings. Leisure services are the next largest offering, with 25.5% of units in Thrapston being classed as such. This percentage is just below the national average of 25.3%. Of these units, there are four public houses, namely The Kings Arms, Court House Inn, The Fox Inn and the Masons Arms suggesting a strong night time economy for such a small town, along with seven fast food and takeaway businesses.
- 4.282 There is also a strong offer of retail services, with these units making up 21.8% of the units in Thrapston, and again there is little repetition of business offerings with a range of beauty salons, hairdressers and barbers, a tattoo studio, an opticians and post office to name a few. This total stands well above the national average of 15.8%.
- 4.283 Although there are only 5 convenience stores in Thrapston, making up 9.1% of all units, this figure is only just below the national average for comparison stores, which is 9.3%. Of these units, there is a large Co-op supermarket located on the eastern boundary of the centre, offering a wide range of supplies for local residents. It was noted that Thrapston does not have an out of centre supermarket, however given the size of the population, it's unlikely that one is needed when there is a large Co-op available.
- 4.284 One unit type that Thrapston was missing was a bank. Of the 8 financial and business services, making up 14.5% of all units, there were no banks at our time of visit, with these units mainly operating as estate agents. Previously there was a Barclays bank in Thrapston, although this closed in October 2018.
- 4.285 Thrapston has an exceptionally low rate of vacant units, with only one vacancy at our time of visit. Nationally, on average centres have a vacancy rate of 13.8%, meaning that Thrapston's rate of just 1.8% (1 unit) is suggesting a thriving town, that has the unit offering to positively meet demands. With such a low vacancy rate, the addition of new purpose built retail space at ground floor level in the centre as part of new developments would be viable.

Table 4.285.1 Thrapston Town Centre Unit Composition at December 2022

Categories	Thrapston (#)	Thrapston (%)	UK Average 2022 (%)
Comparison	15	27.3%	26.9%
Convenience	5	9.1%	9.3%
Services (total)	34	61.8%	49.8%
Retail	12	21.8%	15.8%
Leisure	14	25.5%	25.3%
Financial & Business	8	14.5%	8.7%
Vacant	1	1.8%	13.8%
Total	55	100.0%	100.0%

Environmental Quality

- 4.286 On the most part, Thrapston is of high architectural quality with a number of Grade II listed buildings along High Street, however some infill developments have not been designed to match the architectural quality. In turn, these developments have led to the detracting to the attractiveness of the streetscape. One notable development is to the west of the centre, that is low rise and an almost zig zag shape. Although this has provided additional commercial floorspace, the development itself is out of keeping with the area. Façade improvements could however improve its appearance, and help it to blend more seamlessly into the centre.
- 4.287 The centre has little to no greenery in the form of trees, planters, shrubs etc. Improvements to this would positively increase the environmental quality of the centre. Solutions to improve this would include adding planters of various sizes and hanging baskets on lamp posts and outside the commercial units. The public realm could also benefit from improvements as it appeared that benches were mainly provided by the businesses, rather than being provided by the council. There were areas that were open enough to make significant public realm improvements.

Perception of Safety

- 4.288 The compact nature of the centre, along with almost full occupancy rates lead to high feelings of safety due to the level of natural surveillance provided by this. This level of natural surveillance is also increased with there being very few corners or walkways that aren't overlooked to some capacity.
- 4.289 However, this can be said for daytime, but it is likely this feeling is lowered once the sun has set as there are only very limited numbers of street lights, meaning there are large stretches of the centre that will be in darkness. This is something that should be improved urgently, given the number of establishments in the centre that operate in the evenings.
- 4.290 In terms of crime rates in Thrapston, 15 crimes were reported in the Town Centre in November 2022. This is up from the 8 that were reported in November 2021 and up again from the 4 reported in November 2020. It is unclear what caused this rise in crime rate in the centre in November, as there were only 8 reported in December 2022, and 9 reported in October of the same year. In terms of electronic surveillance, there were a number of cameras spotted around the centre, although it was unclear if these were privately installed or managed by the council.
- 4.291 Although Thrapston is for the most part an exceptionally safe centre, some improvements could be made to improve the overall sense of safety, with the main improvement being the addition of more street lighting.

Accessibility

- 4.292 Thrapston is located almost equidistant from both Kettering, Corby and Wellingborough train stations. Kettering Station is the most direct to access from Thrapston, taking just a 30 minute bus journey on the route 16 bus, although this bus route is highly infrequent, running at 1.5/2 hour intervals. Besides going to Kettering, the number 16 bus also goes to Raunds, again with a highly infrequent service. The route 14 bus also goes through Thrapston, providing a limited service to Corby, with services not being timed for visitors to Thrapston. Thrapston is highly accessible by private vehicle, both in terms of location and as a consequence of poor public transport provisions, although it could be suggested that parking provisions need to be improved. At our time of visit we parked for free at Chancery Lane car park, which has a very central location although was completely full. There is another car park located to the east of the centre by the Co-op, which is again free of charge. This car park was also reaching full capacity, so this being said, improvements to parking provisions are recommended. There are also a handful of spaces along the High Street, although you can only park in these for 30 minutes, meaning they are only a viable option for quick visits to the centre.
- 4.293 Due to the location of Thrapston, it is highly accessible by foot, although improvements need to be made for safe pedestrian movement. For example, crossing points are only found on two occasions, at either ends of the centre and the High Street has regular, quite fast moving traffic, along with it being the bus route. This suggests the need for both traffic calming measures, along with more crossing points to allow for easier movement between the sides of the centre. In terms of pavements, in areas they are widened, but in general around the centre there were large areas of narrower pavements, but were always even and passable for all users.
- 4.294 There was little to no evidence of cycling as a means of transport in Thrapston, which given its location to large areas of residential dwellings, is surprising, and is something that should be promoted to encourage more active travel.

Markets

- 4.295 Thrapston, being historically a market town, does still have markets running in the centre. On the first Saturday of every month (except January) a farmers market is held on Thrapston High Street between 9-1pm selling a wide range of local produce and artisan products. There is also a weekly market held every Tuesday on the High Street, selling a range of fruit, vegetables, bread, pastries and plants.

Public Opinion

- 4.296 Results from the household survey identified the top “likes” and “dislikes” of the Town Centre, as seen below.

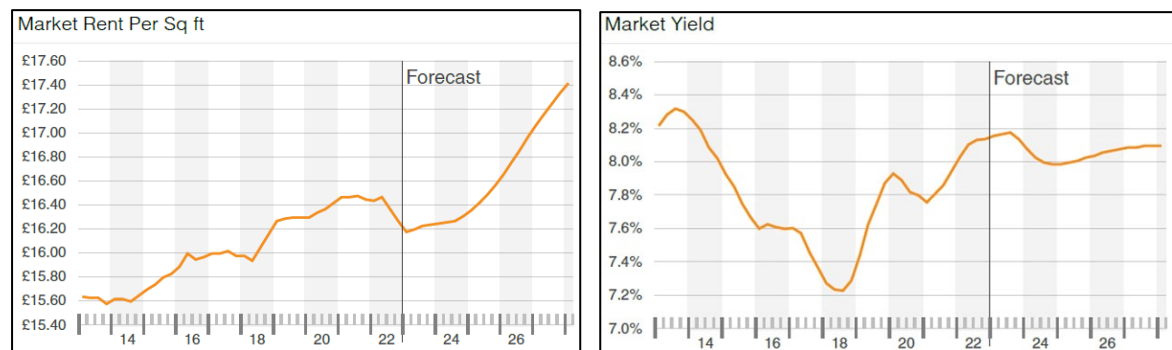
Thrapston Town Centre Public Opinions



Prime Rents and Yields

- 4.297 The CoStar Retail Report 2023 identifies the market rent per square foot to be £13.08 and identifies that market yield in Thrapston Town Centre is 8.5%

Market Rent per SF and Market Yield for Thrapston



Source: CoStar Retail Report 2023

Commercial Demand

- 4.298 We have reviewed The Requirement List database to understand what operators seek representation in the respective centres.
- 4.299 We have identified one operator that seeks representation specifically in Thrapston Town Centre. This is shown in the table below.

Table 4.299.1 Operator Requirement List for Thrapston

Occupier	Description	Size (min) sq ft	Size (max) sq ft
Aldi	Supermarket	18,000	22,000

Conclusions

- 4.300 Of all the centres in North Northamptonshire, Thrapston has the best occupancy rates and overall high level of vibrancy in the Town due to a diverse range of unit occupancies and distinct architectural style. This success appears to not have been impacted from the opening of Rushden Lakes, and it is one of the few centres of the study where this can be said. This is likely due to the distance from Rushden Lakes, meaning local residents still benefit from having a local centre to meet their day to day needs.
- 4.301 The levels of safety in Thrapston, along with the public realm in the centre both require improvements, although they do both only require quite simple initiatives for improvement.

Rushden Lakes

Description

- 4.302 Although Rushden Lakes is not a defined centre in North Northamptonshire, we conducted a healthcheck to understand its offering, and how its development has impacted the medium and large centres in the region. Rushden Lakes operates as a regional scale attraction, however the effects of Rushden Lakes on smaller Town Centres is less, as their offering has always been more independent and local businesses that operate in small units.
- 4.303 The out of centre retail park, Rushden Lakes, is situated just off the A45 on the northern outskirts of Rushden, and opened in 2017. In 2019 further retail and leisure units were added. In total now, there are over 80 purpose built retail and leisure units, providing purpose built floor space that have been occupied by a wide range of national multiples. The site is anchored by Frasers (a state of the art concept House of Fraser store), Primark and Marks and Spencer. The main shopping centre, is also connected by footbridge to a separate out-of-town centre anchored by Waitrose and Partners and Lidl.

Photos looking south across the car park and west along the southern row of shops (taken December 2022)



GOAD Composition and Vacancies

- 4.304 Across the entire defined centre of Rushden Lakes, there are 96 units. The majority of units are located to the North, with the main composition mix being comparison and leisure services. The southern part of the centre, has a higher occupation of comparison, and retail services.

- 4.305 Rushden Lakes is dominated by comparison operators, with 50% of units being categorised as such. All comparison units are national multiples, with no independent operators. This figure lies just under 20% higher than the national average of 30.1%, suggesting that the development of this out of centre retail park and the cluster of purpose built units was highly viable.
- 4.306 The offer of leisure services at Rushden Lakes is also high, with 26 units, or 27.1% of all units falling into this category. They are predominantly focused along the northern boundary of the centre, along with a large cinema and leisure complex that was more recently built to the west. Again, a majority of these units are national multiples, although there are a handful of independent businesses in this mix.
- 4.307 At our time of visit 13 units at Rushden Lakes were vacant, making up 13.5% of all units there. Although this is marginally higher than the current national average of 13.8%, there is no major cause of concern as it is likely the premises will attract businesses to open up over time as it stands. The Covid-19 pandemic will have impacted the centre, along with wider market trends, most recently the announcement of the closure of Paperchase. According to online articles, closing down signs have recently been put up in Rushden Lakes' Paperchase store. It should be noted, that the week after our visit one vacant unit was scheduled to open up as the national multiple comparison store Waterstones.

Table 4.307.1 Rushden Lakes centre Unit Composition at December 2022

Categories	Rushden Lakes (#)	Rushden Lakes (%)	UK Average 2022 (%)
Comparison	48	50.0%	26.9%
Convenience	5	5.2%	9.3%
Services (total)	30	31.3%	49.8%
Retail	4	4.2%	15.8%
Leisure	26	27.1%	25.3%
Financial & Business	0	0.0%	8.7%
Vacant	13	13.5%	13.8%
Total	96	100.0%	100.0%

Environmental Quality

- 4.308 Of all the centres in North Northamptonshire, Rushden Lakes, in particularly the main retail centre north of the A45, has an exceptionally high level of environmental quality given its out of centre retail park nature. This high standard of quality has been created both by the attractive appearance of units, design of unit positions and scale as well as the centres location adjoining the Nene Wetlands Nature Reserve. The Nene Wetlands Visitor Centre occupies a unit within Rushden Lakes, merging the two attractions together.
- 4.309 The public realm at Rushden Lakes is also of a high standard, with a tree lined car park, shrubs bordering every crossing point, and regular seating. However, it is suggested that there could be a level of public realm improvements around the units to the south of the A45, which will also improve the sense of safety.

Perception of Safety

- 4.310 Rushden Lakes felt incredibly safe and secure at our time of visit. Retail units span the entire circumference of the main centre, with all store fronts facing inwards, so walking around, there were no areas that felt like they did not benefit from natural surveillance. This was made even better by there only being a few vacant units. There were also traffic calming measures in place throughout the central car park, along with regular crossing points making for safe movement around the centre.

- 4.311 As you cross over the A45, the sense of safety is reduced moving between units. The design of this part of Rushden Lakes favours private vehicle movement it felt, over pedestrians and the feeling of safety as you move around by foot could benefit with improvement if it was deemed that people move around the area in this way.

Accessibility

- 4.312 The location of Rushden Lakes means that private vehicles are the most common mode of transport to the site. The proximity to the A45 means that people can access the centre from the entire North Northamptonshire area with relative ease, along with the centre being accessible for people travelling from the wider Northamptonshire area, and neighbouring counties. The main part of the centre provides free parking to visitors for five hours.
- 4.313 Both parts of the centre are accessible by bus. The main retail centre is served by bus routes 50, VL13, X46 Gold and X47 Gold, which provide services to Raunds, Kettering, Higham Ferrers, Northampton, Rushden and Wellingborough. They stop at a bus stop at the main entrance. The part of the centre located south of the A45 is also served by the bus routes 50, VL13, X46 Gold and X47 Gold, providing the same services as those listed previously. Although there are a number of destinations that can be reached by bus, most services run hourly meaning that they are likely not well used as a means of transport to the centre.
- 4.314 Due to its location, access to Rushden Lakes by walking and cycling is difficult. This could benefit from improvement, particularly from Stanton Cross (proposed Greenway), along with a new access onto Ditchford Road.
- 4.315 We visited Rushden Lakes mid-week around lunch time and across the entire centre there was a high level of pedestrian activity. It is understood that it gets even busier at weekends. Given the nature of the development, it is likely that visitors will go there for more than a single purpose trip and spend some time looking around the centre. Although there is a bridge connecting between the north and south of the A45, it was not noticeably being used at our time of visit, suggesting visitors use private vehicles to move between the areas.

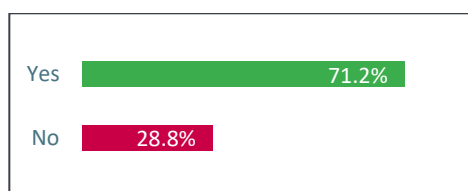
Markets

- 4.316 There was no evidence of markets being held at Rushden Lakes at the time of our study.

Public Opinion

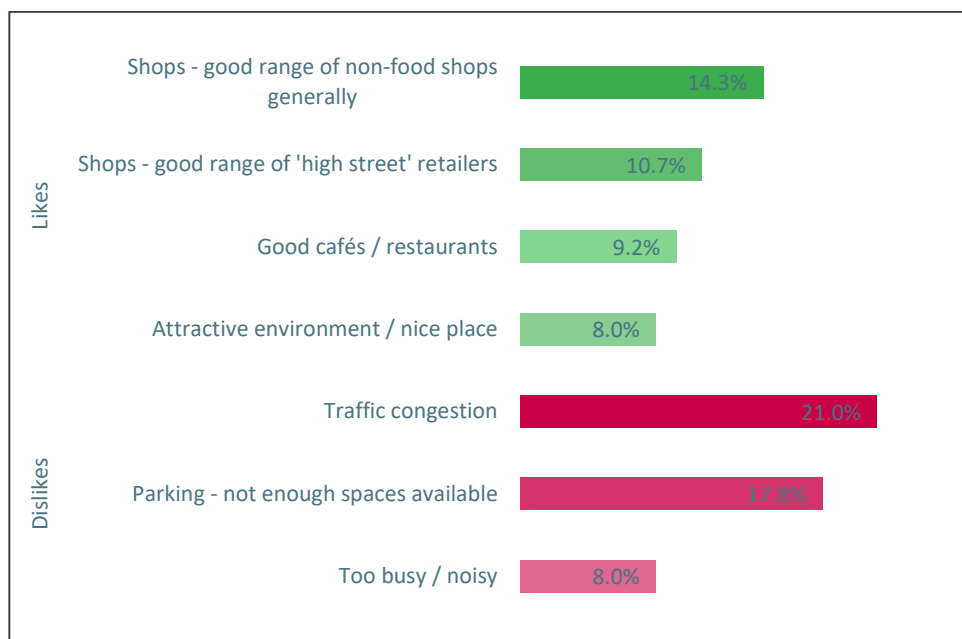
- 4.317 Results from the household survey identified if people visit “yes” or don’t visit “no” Rushden Lakes, as seen below.

Rushden Lakes visitors



- 4.318 Results from the household survey also identified the top “likes” and “dislikes” of Rushden Lakes, as seen below.

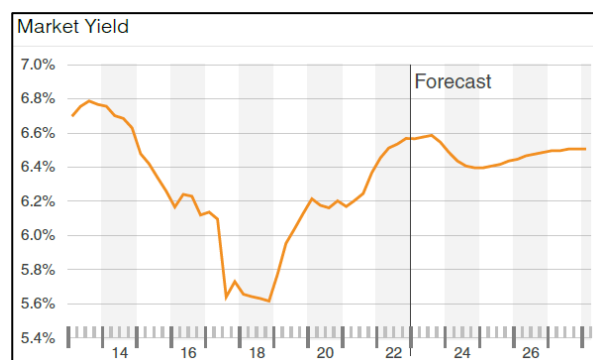
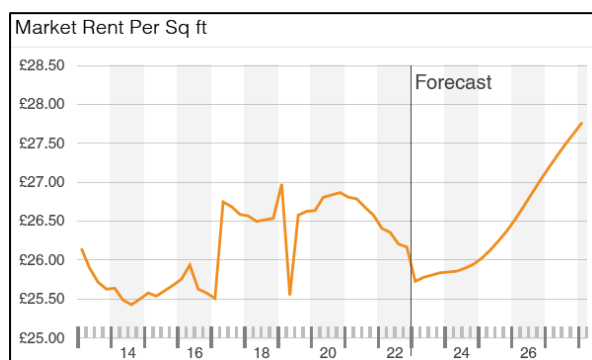
Rushden Lakes Public Opinions



Prime Rents and Yields

- 4.319 The CoStar Retail Report 2023 identifies the market rent per square foot to be £25.79 and identifies that market yield in Rushden Lakes is 6.6%.

Market Rent per SF and Market Yield for Rushden Lakes



Source: CoStar Retail Report 2023

Conclusions

- 4.320 Rushden Lakes is a centre dominated by comparison and leisure services. Of these units, a vast majority are popular national multiples, and the centre has a low vacancy rate. Although Rushden Lakes is a thriving centre, it is without a doubt that its opening in 2017 has had a detrimental impact on the nearby main town centres.

5. Population and Expenditure

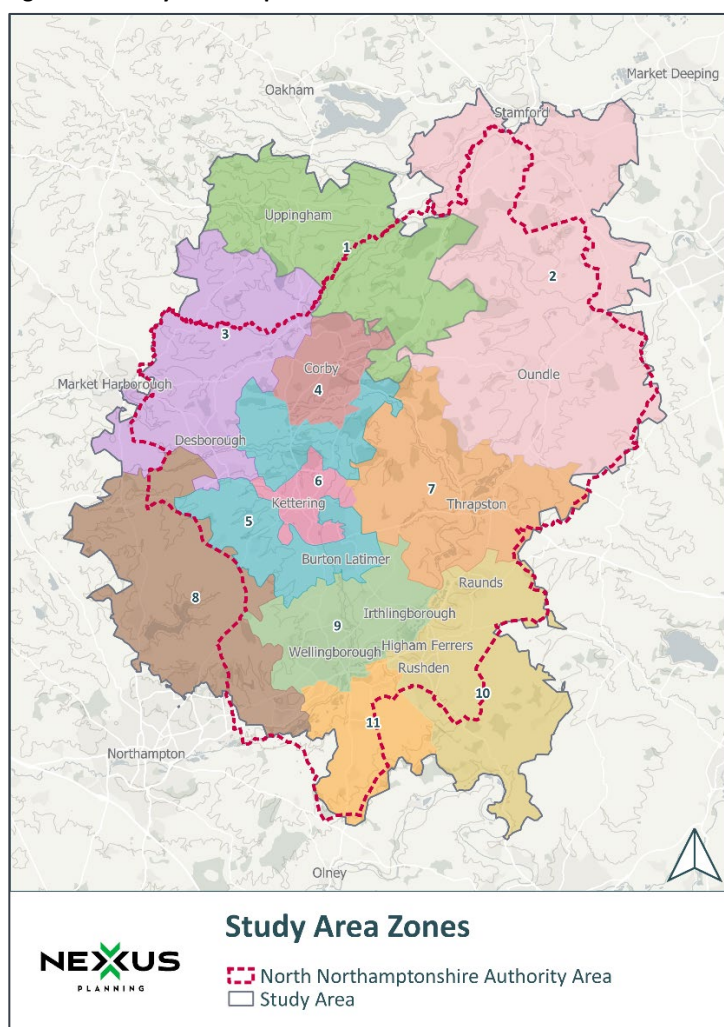
Introduction

- 5.1 This section defines the Study Area and describes the Household Survey undertaken to inform this Study. It summarises the key findings on internet shopping patterns, as well as a survey-derived market share analysis for convenience and comparison goods spending at 'bricks and mortar' locations. We also examine the level of take-up for various leisure activities and examine any locally identified deficiencies in provision.
- 5.2 As part of this analysis, we set out the results of our quantitative capacity assessment for new retail (comparison and convenience goods) and leisure floorspace in the Council area, covering the period from 2023 to 2041.

Study Area and Household Telephone Surveys

- 5.3 In November 2022, a survey of 1,300 households was undertaken by NEMS within the defined Study Area to ascertain where residents go to undertake a range of shopping and leisure activities. The Study Area reflects the area where residents look to facilities within North Northamptonshire to help meet their retail and leisure needs. As a result, the Study Area extends slightly beyond the boundary of the North Northamptonshire authority area. A plan of the Study Area is provided as Appendix A and in the figure below.

Figure 5.1: Study Area Map



- 5.4 Across the 11 zones, a minimum of 100 surveys have been undertaken, with the remaining additional 200 surveys apportioned evenly across the four most populous zones²³. These surveys were based on population ratios in order to obtain accurate samples. A full description of the research methodology, sampling size, weightings and sample profiles is contained at the beginning of the NEMS report in Appendix B. NEMS quote their work as being within a 95% confidence range.
- 5.5 The table below sets out the postcode sectors which comprise each Zone.

Table 5.1: Study Area Postal Sectors and Number of Interviews

Zone	Zone Name	Postcode Sectors	Number of Interviews
1	Uppingham	LE15 9, NN17 3	100
2	Oundle	PE8 4, PE8 5, PE8 6, PE9 3	100
3	Rothwell & Desborough	LE16 8, NN14 2, NN14 6	100
4	Corby	NN17 1, NN17 2, NN17 4, NN17 5, NN18 0, NN18 8, NN18 9	150
5	Kettering Hinterlands	NN14 1, NN15 5	100
6	Kettering Town	NN15 6, NN15 7, NN16 0, NN16 8, NN16 9	150
7	Thrapston	NN14 3, NN14 4	100
8	North of Northampton	NN3 7, NN6 0, NN6 9	100
9	Wellingborough	NN8 1, NN8 2, NN8 3, NN8 4, NN8 5, NN8 6, NN9 5	150
10	Rushden and Raunds	MK44 1, NN10 0, NN10 6, NN10 8, NN10 9, NN9 6	150
11	South of Wellingborough	NN29 7	100
Total			1,300

Source: Appendix B

- 5.6 The zones were used as the basis for the NEMS household survey, which informed the assessment of shopping patterns as set out at Section 6 of this report. The survey results also underpin the quantitative retail capacity assessment which follows at Section 7.
- 5.7 To identify the expenditure claimed by retail destinations, it is necessary to estimate the population and future convenience and comparison goods expenditure apparent in the Study Area.

Study Area Population

- 5.8 The population within each postcode sector and each zone at 2023 has been calculated using Experian Micromarketer data (2022 estimate) as a starting point. In estimating the future population in each zone, our model employs the percentage population growth rates used in the North Northamptonshire Housing and Economic Needs Assessment (HENA) of July 2023, which have been applied to the Study Area as a whole.²⁴
- 5.9 The population projections used in the HENA are based on the assumption that all of North Northamptonshire's housing need will be delivered over the plan period up to 2041, with population growth within the local authority area anticipated to exceed past trends. A significant proportion of the identified housing need will be met by the Sustainable Urban Extensions (SUEs) and Strategic Sites that are planned within the local authority area. Thus, in practice, the population growth will be heavily influenced by the delivery rates of the SUE and Strategic Sites developments.
- 5.10 Section 7 of this report comprises a standalone, 'broad brush', indicative capacity assessment which estimates the potential population of the proposed SUEs and Strategic Sites and considers the scale of provision which might be required to support district or local centres within them.

²³ These being Zones 4, 6, 9 and 10.

²⁴ The HENA population growth rates are considered to be more robust than Experian's population projections, in this instance, because the latter are necessarily based on past trends rather than plan-led growth and thus do not reflect the full extent of the development associated with the planned Sustainable Urban Extensions, much of which is yet to be implemented.

- 5.11 In estimating the future population of the Study Area, consideration has been given to the authority area's population projections across the period to 2041.
- 5.12 Table 5.2 below sets out our population projections for each zone in the Study Area for reporting years 2023, 2026, 2028, 2031, 2036 and 2041.

Table 5.2: Population Projections by Survey Zone

Zone	2023	2026	2028	2031	2036	2041
1	13,001	13,365	13,586	13,895	14,386	14,883
2	27,760	28,538	29,009	29,668	30,717	31,779
3	31,679	32,567	33,104	33,856	35,054	36,266
4	67,504	69,396	70,540	72,143	74,695	77,278
5	30,117	30,961	31,472	32,187	33,325	34,477
6	54,977	56,518	57,450	58,755	60,834	62,937
7	16,888	17,361	17,648	18,049	18,687	19,333
8	28,742	29,548	30,035	30,717	31,804	32,903
9	71,079	73,071	74,276	75,964	78,651	81,370
10	62,084	63,824	64,877	66,351	68,698	71,073
11	12,193	12,535	12,741	13,031	13,492	13,958
Total	416,024	427,683	434,737	444,617	460,342	476,258

Source: Table 1 of Appendix C

- 5.13 Based on Experian's population projections, we estimate that the Study Area population will increase from 416,024 persons at 2023 to 476,258 persons at 2041. This equates to an increase of 60,234 persons (or 14.5%) over the 18-year period. Over the Local Plan period (2021-2041), the population is expected to increase by 72,413 from 403,845, for an increase of 17.9%.
- 5.14 Given that the Study Area extends slightly beyond the boundaries of the authority area, the population is slightly higher. In 2023, the authority area has a population of 365,124, rising to 413,907 in 2041.²⁵ This increase of 52,348 equates to a 14.5% increase, and as such is in-line with the increase expected in the Study Area.

Non-Store Retailing or Special Forms of Trading

- 5.15 Special forms of trading (SFT) are defined by Experian as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies. For the reasons we have set out in Section 4, it is vital to take account of the proportion of spending which is carried out in these sectors, as it has a significant impact on the capacity for existing and proposed 'bricks and mortar' floorspace.

Convenience Goods Online Shopping

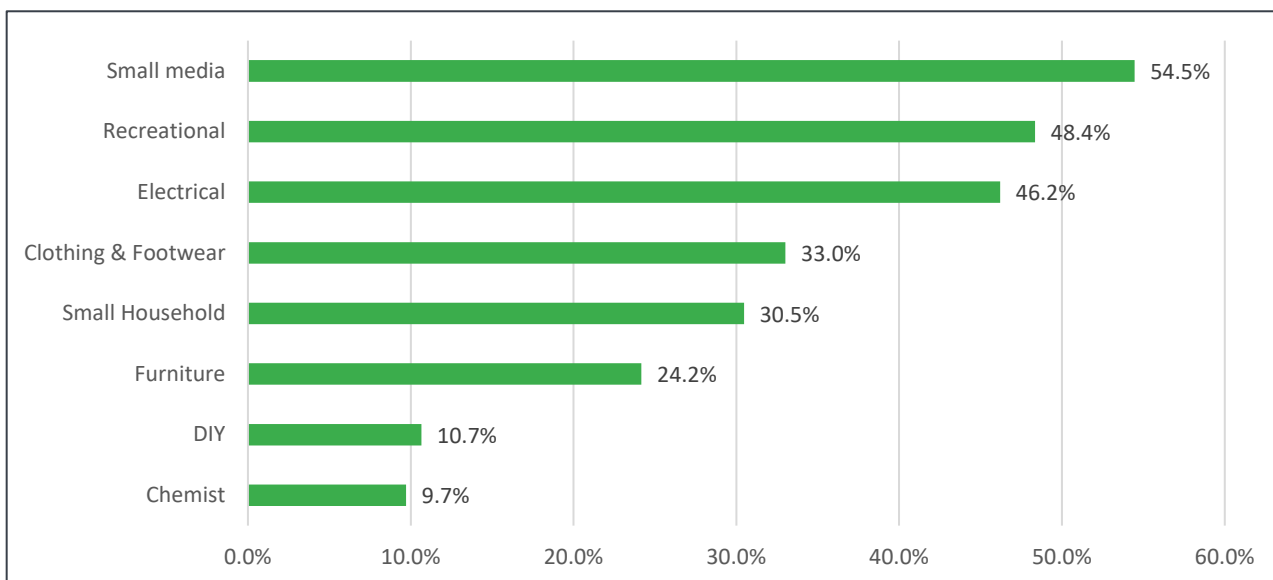
- 5.16 The household survey asked residents of the Study Area where they normally undertake their main food and grocery shopping.
- 5.17 Across the whole Study Area, 10.2% of respondents usually shop online for their main food shop (Question 1 of the Household Survey). As set out earlier, the UK average for online convenience shopping in 2023 is 18.6%. As such, the take-up of online convenience shopping in the Study Area is considerably lower than the UK average.
- 5.18 Question 2 of the Household Survey shows that online convenience goods trade carried out across the Study Area is dominated by Tesco (40.6%) and Asda (21.8%), albeit the preferences on a zone-by-zone basis varies across the Inner Study Area.

²⁵ As per the North Northamptonshire Housing and Economic Needs Assessment (HENA) of July 2023.

Comparison Goods Online Shopping

- 5.19 The household survey also asked where respondents usually shop for different types of comparison goods. The findings presented in the figure below show that the take-up for online shopping varies across the categories. On average, within the Study Area, 32.1% of respondents shop online for comparison goods, which is slightly below the UK average of 35.4%.

Figure 5.2: Online Comparison Goods Spending in the Study Area



Source: Appendix C

Retail Expenditure Forecasts

- 5.20 In order to calculate per capita convenience and comparison goods expenditure, we have utilised Experian Micromarketer data, which provides detailed information on local consumer expenditure that takes into consideration the socio-economic characteristics of the local population. The base year for the Experian expenditure data is 2021 and thus all monetary figures are given in 2021 prices (unless otherwise stated). Our methodology takes account of the fact that some special forms of trading expenditure²⁶ is not available to support retail floorspace, and then allows for increases in per capita expenditure growth on an annual basis.
- 5.21 Figure 7 of Appendix 3 of ERPBN20 provides forecasts in respect of the proportion of convenience and comparison goods expenditure that will be committed through special forms of trading both now and in the future. We have 'stripped out' any survey responses which relate to expenditure committed via special forms of trading and have instead made an allowance derived from Experian's recommendations (which we consider to be the most appropriate means by which to account for such expenditure).
- 5.22 We set out Experian's expenditure growth estimates at Table 5.3, which is provided below. It should be noted that Experian only provides growth forecasts to 2040, and, in practice, we extrapolate the annual growth rates at 2040 to provide an estimate for the subsequent year of 2041.
- 5.23 In considering special forms of trading, many products which are ordered online are actually sourced from a store's shelves or stockroom in practice (this is particularly the case with convenience goods). As such, expenditure committed in this manner acts to sustain shops and can be considered 'available' to support floorspace within the Study Area. Accordingly, in order not to overstate the influence of special forms of trading

²⁶ Identified as comprising sales via the internet, mail order, stalls and markets, door-to-door and telephone sales (i.e. all expenditure not available to traditional retail floorspace).

on retailers, our methodology utilises Experian's 'adjusted' allowance for special forms of trading (which is provided at Figure 5 of ERPBN20). This allowance indicates that 5.8% of convenience goods expenditure and 28.7% of comparison goods expenditure is 'lost' from shops at base year 2021 through special forms of trading purchases.

- 5.24 Having made an allowance for special forms of trading, we then take account of projected changes in expenditure in accordance with the recommendations provided by Figure 7 of Appendix 3 of ERPBN20. Experian provides overall growth rates and 'adjusted' rates, which account for any additional increases in expenditure lost to special forms of trading. The latest growth rates suggest that growth in comparison goods expenditure is expected to decline slightly until 2024, when it is then expected to increase again.
- 5.25 For convenience goods, Experian forecasts very limited per capita expenditure growth across the entire period to 2040. The position is even more pessimistic when account is taken of future growth in special forms of trading, with Experian's forecasts suggesting that the growth in convenience goods expenditure available to actual stores will not exceed 0.1% per annum across the entire period 2022 to 2041. Experian's Retail Planner Briefing Note 20 explains that the reasons for the limited growth across the comparison sector are diverse and include: high inflation leading to a fall in the volume of goods sold, high energy costs and supply chain disruptions as a result of events like the Covid-19 pandemic and Ukraine-Russia conflict, unfavourable demographic trends and weak labour force growth compared to historic averages, and the cost-of-living squeeze. Overall, it is evident that per capita convenience goods expenditure is not forecast to increase in the period to 2041.
- 5.26 The position in respect of comparison goods expenditure is more positive. Experian forecasts that per capita comparison goods expenditure growth will decline somewhat in 2023 and 2024, before increasing again. Experian's forecast suggests that there will be relatively healthy growth in comparison goods even after accounting for expenditure lost to special forms of trading.

Table 5.3: Experian Retail Planner Briefing Note 20 Convenience and Comparison Goods Annual Per Capita Growth Rates

Year	Convenience Goods	Convenience Goods 'Adjusted SFT'	Comparison Goods	Comparison Goods 'Adjusted SFT'
2023	-2.4	-2.2	-1.6	-1.0
2024	-0.4	-0.7	0.3	-0.8
2025	0.0	-0.3	1.3	0.3
2026	0.1	-0.2	2.5	1.6
2027	0.1	-0.1	3.0	2.2
2028	0.1	-0.1	3.0	2.4
2029	0.1	0	3.0	2.5
2030	0.1	0	3.0	2.6
2031	0.1	0	3.0	2.6
2032	0.1	0	3.0	2.7
2033	0.2	0.1	3.0	2.7
2034	0.2	0.1	3.1	2.7
2035	0.2	0.1	3.0	2.8
2036	0.2	0.1	3.0	2.8
2037	0.2	0.1	3.0	2.8
2038	0.2	0.1	3.0	2.8
2039	0.2	0.1	3.0	2.8
2040	0.2	0.1	3.0	2.8

Source: Figure 7 of Appendix 3, Experian Retail Planner Briefing Note 20 (January 2023)

- 5.27 Growth in expenditure forecasts in the longer term (beyond the next ten years) should be treated with caution given the inherent uncertainties associated with predicting the performance of the economy over time

(particularly in the current economic, health and political climates). As such, assessments of this nature should be reviewed on a regular basis in order to ensure that forecasts over the medium and longer term reflect changing circumstances.

- 5.28 In this regard, we also note that paragraph 85 of the revised NPPF requires local planning authorities to allocate sites to meet likely needs ‘...looking at least ten years ahead’, which differs from the previous requirement to meet needs across the entire plan period. We believe that this change directly reflects current economic conditions and changes in the retail sector in recent years. By applying Experian’s recommendations in respect of special forms of trading and expenditure growth, we are able to produce expenditure estimates for each survey zone and the Study Area as a whole at 2023, 2026, 2028, 2031, 2036 and 2041.

Convenience Goods Expenditure

- 5.29 Taking into account the Study Area resident population and the available per capita convenience goods expenditure, we estimate that £960.4m²⁷ of convenience goods expenditure originates within the Study Area at 2023. The below Table 5.4 indicates that available Study Area convenience goods expenditure is forecast to increase to £1,093.9m at 2041.

Table 5.4: Total Available Study Area Convenience Goods Expenditure

2023 (£m)	2026 (£m)	2028 (£m)	2031 (£m)	2036 (£m)	2041 (£m)
960.4	975.5	989.6	1,012.1	1,052.1	1,093.9

Note: In 2021 Prices

- 5.30 Table 5.5 indicates that this represents an increase of £133.5m (or 13.9%) across the Study Area between 2023 and 2041. Given the static growth in per capita expenditure, this increase can be attributed to growth in the Study Area’s population.

Table 5.5: Growth in Available Study Area Convenience Goods Expenditure

Growth 2023-26 (£m)	Growth 2023-28 (£m)	Growth 2023-31 (£m)	Growth 2023-36 (£m)	Growth 2023-41 (£m)
15.1	29.2	51.7	91.7	133.5

Note: In 2021 Prices

- 5.31 We have assumed that around 75% of available convenience goods expenditure would take the form of main food shopping and that around 25% would take the form of top-up shopping (which relates to smaller purchases, often including staple items such as milk and bread)²⁸.
- 5.32 By applying this ratio, we estimate that main food shopping trips account for £720.3m of Study Area convenience goods expenditure at 2023, and top-up shopping trips account for £240.1m.

Comparison Goods Expenditure

- 5.33 For comparison goods, Table 5.6 sets out our estimate that the resident population of the Study Area will generate £1,162.6m of comparison goods expenditure at 2023. Available comparison goods expenditure is then forecast to grow to £1,996.6m at 2041.

Table 5.6: Total Available Study Area Comparison Goods Expenditure

2023 (£m)	2026 (£m)	2028 (£m)	2031 (£m)	2036 (£m)	2041 (£m)
1,162.6	1,208.2	1,285.3	1,418.3	1,681.0	1,996.6

Note: In 2021 Prices

²⁷ In 2021 prices, as is every subsequent monetary reference.

²⁸ This is a fairly standard split applied in undertaking this exercise.

- 5.34 The identified increase in comparison goods expenditure growth is substantial, but it represents a level of annual growth that is more circumspect than that which has been achieved in the past. This is due to both a reduction in the overall level of growth when compared to that achieved in the early part of this millennium and as a consequence of further forecast increases in expenditure committed via special forms of trading (most obviously, internet shopping). As the below Table 5.7 identifies, our assessment estimates that there will be an increase of £834.0m in respect of Study Area comparison goods expenditure between 2023 and 2041.

Table 5.7: Growth in Available Study Area Comparison Goods Expenditure

Growth 2023-2026 (£m)	Growth 2023-2028 (£m)	Growth 2023-2031 (£m)	Growth 2023-2036 (£m)	Growth 2023-2041 (£m)
45.6	122.7	255.7	518.4	834.0

Note: In 2021 Prices

- 5.35 We sub-divide comparison goods expenditure into eight categories, these being: 'DIY', 'Electrical' and 'Furniture' (collectively referred to as bulky goods); and, 'Clothing and Footwear', 'CDs, DVDs and Books', 'Health, Beauty and Chemist Goods', 'Small Household Goods', and 'Toys, Games, Bicycles and Recreational Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis. Experian's estimates are reflected in the detailed expenditure tables set out at Table 7b of Appendix C of this report.
- 5.36 In considering expenditure growth, it should be noted that not all growth arising within the Study Area will be to support additional floorspace. Instead, account needs to be taken of: the market share of expenditure secured by retailers within the authority area; the claim made by existing retailers on expenditure growth (the future efficiency of retail floorspace); and, the expenditure that will be claimed by committed retail developments.

6. Shopping Patterns and Retail Capacity Assessment

Convenience Goods Findings

Market Shares

- 6.1 Before considering the capacity for new convenience goods floorspace, we firstly examine the overall convenience goods spending by residents of the Study Area. Table 6.1 shows where Study Area residents are spending their money.

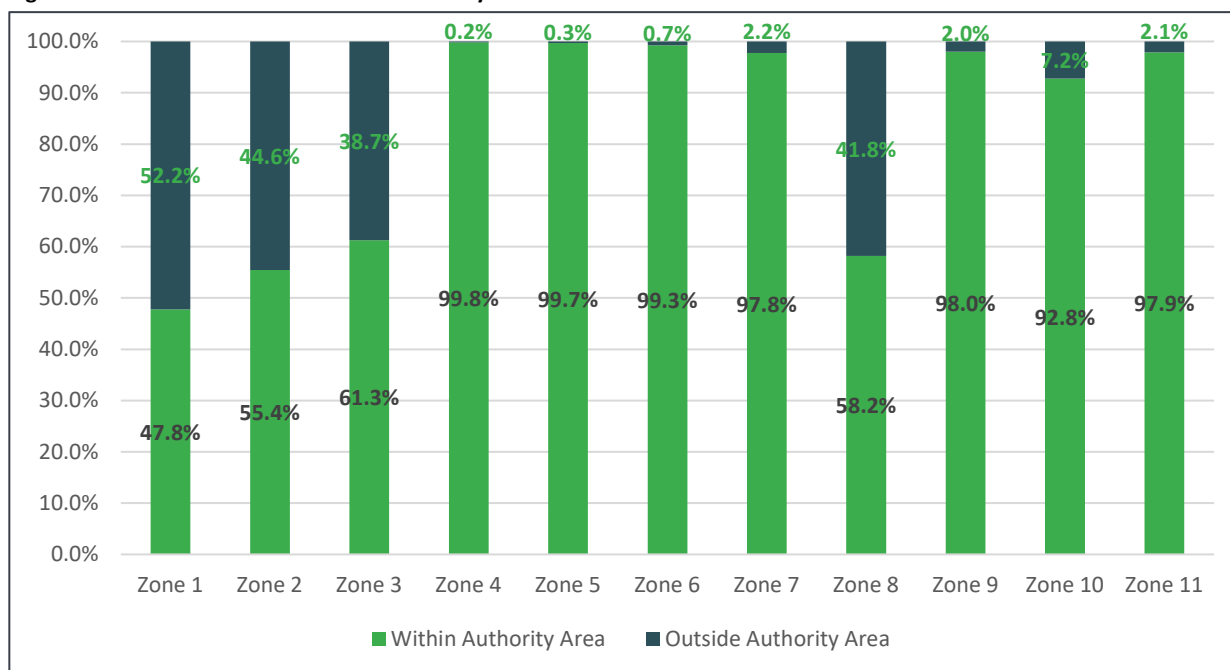
Table 6.1: Convenience Goods Market Share at 2023

Destination	Total convenience (%)	Total convenience (£m)
<i>Within Study Area</i>	<i>90.2%</i>	<i>£866.6</i>
Within Authority Area	86.8%	£833.7
Outside Authority Area	3.4%	£32.9
<i>Outside Study Area</i>	<i>9.8%</i>	<i>£93.8</i>
Total	100.0%	£960.4

Source: Appendix C

- 6.2 The results show that of a total available convenience spending of £960.4m, 90.2% (£866.6m) is spent within the Study Area. Of this, £833.7m is spent within the authority area.
- 6.3 The remaining 9.8% (£93.8m) of convenience spending carried out by residents of the Study Area takes place at destinations outside of the Study Area.
- 6.4 The market share assessment indicates that the authority area provides well for its own residential population in terms of convenience goods spending, as a retention figure of 86.8% is a healthy indicator.
- 6.5 Importantly, we can also examine the destination of convenience goods spend within each Zone of the Study Area. 0 assesses the amount of convenience goods spending carried out in the Council area by residents of each Zone. As seen, there are very healthy levels of retention across Zones 4, 5, 6, 7, 9, 10 and 11, where retention in all cases is above 90%. Retention levels in Zones 1, 2, 3 and 8 are, however, notably lower. This is likely due to the geographical positions of these zones, wherein large areas lie outside of the local authority area. It is also likely that the towns of Peterborough and Northampton are particular draws of expenditure.

Figure 6.1: Convenience Goods Market Share by Zone



Source: Appendix C

- 6.6 Turning to individual retail destinations, where national company averages are available for benchmarking purposes, we are able to compare local turnover to the turnover of an average store of that size in order to identify where facilities may be trading above or below business expectations. This is summarised in the table below.

Table 6.2: Convenience Benchmarking within Authority Area at 2023

Zone	Benchmark Turnover (£m)	Survey Turnover	Trading Position against Benchmark (£m)	Trading Position against Benchmark (%)
1	1.2	1.0	-0.2	-18.9%
2	26.6	31.5	4.9	18.5%
3	19.0	11.0	-8.1	-42.4%
4	79.4	91.5	12.0	15.1%
5	14.9	15.4	0.5	3.2%
6	68.9	74.0	5.1	7.3%
7	11.3	9.4	-1.9	-16.7%
8	15.9	17.1	1.2	7.3%
9	175.5	201.1	25.7	14.6%
10	165.8	118.4	-47.5	-28.6%
11	7.1	5.2	-1.9	-26.3%
Total	585.7	575.5	-10.3	-1.8%

Source: Appendix C

- 6.7 The results show that the convenience floorspace in the authority area is, on average, performing slightly below benchmark when considered cumulatively. Facilities in the authority area are trading at an average of 1.8% below benchmark. There is considerable variance when considering performance across the different Zones. Performance is strongest in Zone 2, where survey turnover is 18.5% higher than benchmark. Performance is weakest in Zone 3, where survey turnover is 42.4% lower than benchmark.
- 6.8 The table below sets out the best and worst-performing standalone stores.

Table 6.3: Best and Worst Performance Benchmarking – Convenience Goods

Store	Benchmark Turnover (£m)	Survey Turnover (£m)	Trading Position against Benchmark (£m)
Best Performing			
Tesco Extra, Carina Road, Kettering	45.5	64.4	+18.9
Aldi, Attley Way, Irthlingborough	10.5	29.1	+18.6
Aldi, Victoria Road, Wellingborough	7.8	20.7	+13.0
Sainsbury's Superstore, Rockingham Road, Kettering	29.2	41.8	+12.6
Tesco Superstore, Tunnells Mill Lane, Wellingborough	44.3	56.9	+12.6
Worst Performing			
Waitrose, Crown Park, Rushden	56.0	15.9	-40.0
Morrisons, Lower Street, Kettering	39.7	19.5	-20.2
Morrisons, Oakley Road, Great Oakley, Corby	27.8	15.7	-12.1
Morrisons, Oxford Street, Wellingborough	41.5	30.4	-11.1
Co-op, Brook Street, Raunds	10.7	1.5	-9.2

Source: Appendix C

Convenience Goods Capacity

- 6.9 One of the key aims of this Study is to provide recommendations on the capacity for new retail floorspace over the plan period to 2041. The use of long-term projections should be treated with caution and reviewed regularly in order to test the accuracy of the forecasts against emerging datasets. External, national and international factors can influence the wider performance of the economy, which can have trickle-down effects on local shopping patterns. As discussed in Section 4, one such example has been the economic implications of the United Kingdom leaving the European Union and the social distancing and lockdown measures necessitated by the Covid-19 pandemic, as well as the ongoing cost of living crisis.
- 6.10 Importantly, we also note that any quantitative retail capacity that we may identify across the Study Area does not necessarily equate to justification for new retail floorspace in itself (especially in out-of-centre locations), and any such development would be required to be assessed in line with NPPF policy in terms of impacts on the vitality and viability of Town Centres, the potential to prejudice emerging Town Centre developments, and the 'Town Centre first' sequential approach to site selection. Equally, the converse also applies and a lack of identified capacity should not specifically rule out retail developments, where other material factors support such development. Supporting material factors could include the retail need generated by increases in population, such as in the planned Sustainable Urban Extensions within the local authority area (as explained in Section 7), or potential benefits such as the ability for new retail development to 'clawback' expenditure that currently leaks outside the locality or result in enhanced local consumer choice where this is significantly lacking.
- 6.11 Detailed quantitative retail capacity tables are enclosed at Appendix C.
- 6.12 Retail capacity modelling follows a consistent, robust methodology which incorporates a number of datasets and informed assumptions which we describe further below, but broadly speaking:
- $$\text{Available Expenditure (£m)} - \text{Turnover of Existing \& Proposed (£m)} = \text{Surplus or Deficit (£m)}$$
- 6.13 Experian Micromarketer software is used to provide localised expenditure per capita per annum for various forms of retail spending. These figures are then projected forwards based on population growth, changes in expenditure over time and Special Forms of Trading (SFT), such as internet shopping.
- 6.14 The turnover of existing retailers across the Study Area is calculated based on average sales densities, or turnover, per square metre. Various retail planning sources provide average (or benchmark) sales densities for all national multiple retailers.

- 6.15 The surplus or deficit equates to the difference between the available retail expenditure across the Study Area and the turnover of existing facilities within the Study Area. If the total turnover is greater than the available expenditure, then the model would identify an oversupply of existing retail floorspace, whilst a surplus of expenditure would suggest capacity for additional retail floorspace.
- 6.16 Once the surplus or deficit of expenditure is calculated, it is then presented in floorspace figures (using average sales density assumptions) in order to demonstrate the findings within a 'real world' context. Often, surplus figures are presented under a number of different scenarios representing various retailers. For example, discount retailers (such as Aldi and Lidl amongst others) continue to operate at a lower sales density than the 'big 4' (Sainsbury's, Tesco, Asda, and Morrisons). Given the same available 'pot of expenditure', a higher sales density would result in a lower floorspace capacity than a lower sales density, which would result in a higher floorspace capacity.
- 6.17 Turning now to our detailed findings for the authority area, the household survey results show that facilities within the authority area have a 59.9% convenience goods market share of all spending carried out by residents of the Study Area.
- 6.18 In keeping with standard retail study methodology, when assessing the capacity for new convenience retail floorspace, we adopt a constant market share, in line with findings of the latest household survey (i.e. that stores within the authority area will continue to draw 59.9% of all convenience goods spending from the Study Area). We consider that maintaining a constant market share provides a sensible basis for analysis given the relative lack of planned developments across the Study Area. In coming to this view, we have analysed the level of commitments identified through correspondence with Council officers in the authority area. Convenience commitments can be seen at Table 6c of Appendix C.
- 6.19 Based on a constant market share, we then allow for growth in retail expenditure over the period to 2041, as well as utilising data provided within the latest Experian Retail Planner Briefing Note 20, in order to take account of forecast growth in retail efficiencies (for example, through the adoption of new technologies and more efficient use of available floorspace). Floorspace efficiencies are estimated to have a greater impact on comparison retailers than convenience retailers over the plan period as the rise of food discounting and disruptions to logistics – for example the supply chain disruptions caused by the continued impacts of Brexit, Covid-19 pandemic-related shutdowns and the Ukraine-Russia conflict – continue to subdue projected efficiencies in turnover of existing convenience retail floorspace.
- 6.20 We go on to make a number of statistical assumptions through the quantitative capacity exercise in order to account for the following variables. These are contained at Tables 5a-5c of Appendix C and can be summarised as:
- Utilising a 'goods based' approach, we strip out expenditure for non-food comparison goods such as clothing, household goods, CDs, DVDs and other media that are now commonly sold at major foodstores so that only the convenience goods floorspace is being considered (i.e. on a like-for-like basis with available convenience expenditure). These deductions are made in line with floorspace figures sourced from publicly available databases or, where data is not available, Nexus' professional judgement based on site visits.
 - We also make assumptions as to the gross to net convenience goods sales floorspace of each store, again utilising online planning records where available, national rates databases or Nexus' professional judgement.
 - Finally, we consider whether foodstores are likely to attract any additional 'inflow' from outside of the Study Area. However, given the presence of larger destinations at the periphery of the Study Area, it was determined that there was unlikely to be any significant inflow into the Study Area, and as such inflow was not accounted for in this exercise.

- 6.21 We then go on to calculate the anticipated turnover of all major convenience goods operators based on the published company sales data, referred to as 'benchmark' turnover. 'Benchmark' turnover is calculated from national average 'sales densities' (turnover per square metre). By comparing the turnover estimates derived from the findings of the household survey (total available expenditure distributed on the basis of each destinations market share) to the benchmark turnovers, we are able to establish where stores are trading above (overtrading) or below (under-trading) company averages.
- 6.22 Based on the household survey, the authority area's convenience retailers' turnover is estimated to be £575.5m at 2023. This is projected to increase to £584.5m in 2026, £593.0m in 2028, £606.5m in 2031, £630.4m in 2036 and £655.5m in 2041 (see Table 6a of Appendix C).
- 6.23 Set against these expenditure forecasts, we deduct for extant convenience goods commitments. These are set out at Table 6c of Appendix C. This includes any developments that have not been built, are currently under construction, or have opened or would not have been operating at the time of the household survey. We do not take into account proposed allocations for retail floorspace but consider development proposals for which a formal planning application has been approved. In total, these committed developments equate to a net 2,600 sqm of convenience goods floorspace and an estimated turnover of £24.8m at 2023 (see Table 6c at Appendix C). The commitments are then projected forwards and deducted from the gross surplus expenditure.
- 6.24 Having deducted for extant commitments, we then contrast the pots of available convenience goods expenditure with the benchmark performance of existing facilities at each date. The table below sets out the resultant available convenience goods expenditure at each assessment date.

Table 6.4: Gross Convenience Goods Surplus Expenditure in the Authority Area

Year	Survey Derived Turnover (£m)	Total Forecast "Benchmark" Turnover (£m)	(Gross) Available Expenditure before commitments	Turnover of all committed floorspace (£m)	(Net) Surplus Expenditure (£m)
2023	575.5	585.7	-10.3	24.8	-35.1
2026	584.5	587.5	-3.0	24.9	-27.8
2028	593.0	588.7	4.3	24.9	-20.6
2031	606.5	588.7	17.8	24.9	-7.1
2036	630.4	588.7	41.8	24.9	16.8
2041	655.5	588.7	66.8	24.9	41.9

Source: Appendix C

- 6.25 Using average sales densities to calculate a minimum floorspace scenario (a large supermarket operator) and a maximum floorspace scenario (a combination of discount foodstores operators), we go on to calculate the net additional convenience goods capacity for the authority area – see Table 6.5 below.
- 6.26 Overall, there is negative capacity for convenience floorspace up to 2031, although by 2041 the quantitative capacity for the authority area as a whole is calculated to be between 3,100 sqm and 5,200 sqm net in 2041.

Table 6.5: Net Quantitative 'Capacity' for New Convenience Goods in the Authority Area

Year	Surplus Expenditure (£m)	Minimum Total Capacity in the Authority Area (sq.m net)		Maximum Total Capacity in the Authority Area (sq.m net)
2023	-35.1	-2,600	to	-4,400
2026	-27.8	-2,100	to	-3,500
2028	-20.6	-1,500	to	-2,600
2031	-7.1	-500	to	-900
2036	16.8	1,200	to	2,100
2041	41.9	3,100	to	5,200

Source: Appendix C

Comparison Goods Findings

Market Shares

- 6.27 Turning to consider comparison goods, we examine market shares across the range of categories defined by Experian. These eight categories cover all ranges of bulky and non-bulky items. The full results of our market shares analysis are set out in Tables 7-18 of Appendix C.

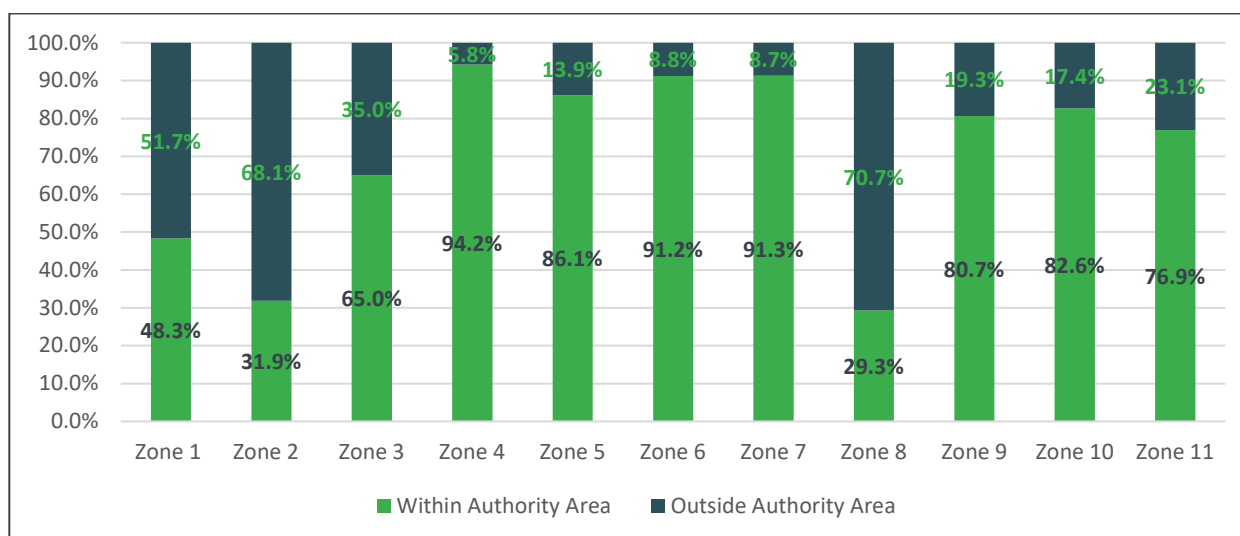
Table 6.6: Comparison Goods Market Share

Destination	Total comparison (%)	Total comparison (£m)
<i>Within Study Area</i>	75.7%	880.7
Within Authority Area	74.7%	868.0
Outside Authority Area	1.1%	12.7
<i>Outside Study Area</i>	24.3%	281.9
Total	100.0%	1,162.6

Source: Appendix C

- 6.28 We are also able to examine the location of comparison goods spending within each Zone. The figure below details the amount of comparison goods spending carried out inside and outside of the authority area. As with convenience spending patterns, retention rates are highest in Zones 4, 5, 6, 7, 9, 10 and 11, whereas leakage is highest in Zones 1, 2, 3 and 8.

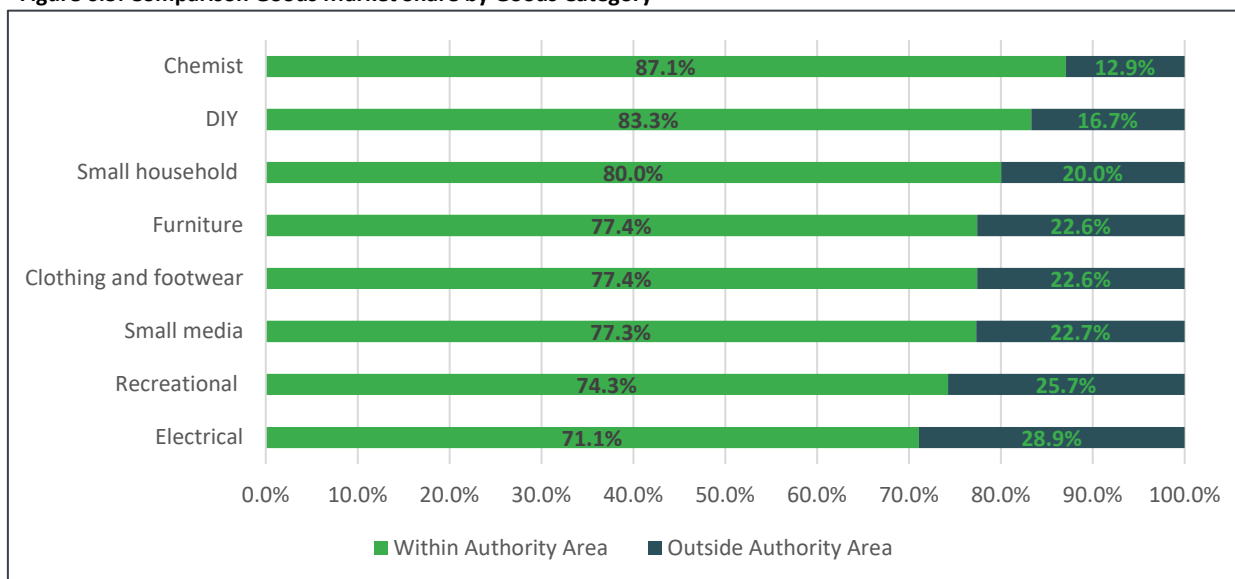
Figure 6.2: Comparison Goods Market Share by Zone



Source: Appendix C

- 6.29 In the graph below, we analyse the market share of different types of comparison goods, considering which items are purchased from stores and centres within the authority area, and what the propensity is to travel further afield for certain items.

Figure 6.3: Comparison Goods Market Share by Goods Category



Source: Appendix C

- 6.30 The survey results show that there is some variance between spending on different goods categories within and outside of the authority area. Spending within the authority area varies from 87.1% for chemist goods, to only 71.1% for electrical goods. Generally speaking, however, there is still a high level of retention for the authority area across all comparison goods categories.

Comparison Goods Capacity

- 6.31 The methodology for calculating capacity for comparison goods floorspace differs from that used to model capacity for convenience goods floorspace. The principal reason for this is that there are no robust, industry standard, benchmark sales densities for calculating the turnover of smaller independent retailers that typically make up the majority of the comparison provision of Town Centres (although it is noted that sales densities are published for national multiple comparison retailers). Moreover, the trading levels of comparison retailers can fluctuate significantly depending on a number of localised variables, most notably the location of the retailer relative to similar providers (as customers are more likely to link multiple comparison goods trips to retailers in close proximity to each other).
- 6.32 As such, we adopt the approach that comparison goods retailers across the Study Area are trading 'at equilibrium' at 2023, meaning we adopt the survey derived turnover of each facility and examine capacity by measuring the growth in available expenditure to 2041. For the purposes of our assessment, we have assumed that the authority area's attraction to Study Area residents will remain constant at 75.8% of all spending proportionate to population growth (Table 27a of Appendix C). Based on the limited scale of planned developments inside and nearby the authority area, we consider this a robust basis for analysis. For the majority of Zones, we have assumed no inflow of comparison spendings. However, for Zones 4, 6, 9 and 10, we have assumed an inflow of 5% spend. These Zones broadly align with the centres of Corby, Kettering, Wellingborough and Rushden Lakes. These centres were judged to have a larger draw from outside of the Study Area either due to their size, their geographic location or the strength of their comparison offer. The difference between the survey derived turnover figure and the benchmark turnover is the gross comparison goods available expenditure.
- 6.33 We then consider committed and extant planning permissions for new comparison retail floorspace across the Study Area that are likely to come forward over the plan period, again informed by our discussions with Council officers. This includes any developments that are currently under construction, or would not have been operating at the time of the household survey. In total, these committed developments equate to a net 1,527 sqm of

comparison goods floorspace and an estimated turnover of £6.9m at 2023 (see Table 27c at Appendix C). The commitments are then projected forwards and deducted from the gross surplus expenditure. The figure below sets out the resultant net comparison goods capacity forecasts over time, whereby by 2041 there will be £205.8 of comparison goods expenditure capacity.

Table 6.7: Gross Comparison Goods Surplus

Year	Survey Derived Turnover (£m):	Benchmark Turnover (£m)	(Gross) Available Expenditure before commitments (£m)	Turnover of all committed floorspace (£m)	(Net) Surplus Expenditure (£m)
2023	880.7	922.2	0.0	6.9	-6.9
2026	915.2	955.6	2.6	7.1	-4.5
2028	973.6	994.2	24.1	7.4	16.7
2031	1,074.4	1,030.0	90.7	7.7	83.0
2036	1,273.4	1,182.5	144.0	8.8	135.2
2041	1,512.4	1,357.6	215.9	10.1	205.8

Source: Appendix C

- 6.34 We are then able to calculate the net comparison goods capacity floorspace for the authority area, as shown in the figure below. By 2041 we estimate there will be between 25,400 sqm net and 39,900 sqm net of comparison floorspace capacity across the authority area.

Table 6.8: Net Quantitative 'Capacity' for New Comparison Goods in the Authority Area

Year	Surplus Expenditure (£m)	Minimum Total Capacity in the Authority Area (sqm net)		Maximum Total Capacity in the Authority Area (sqm net)
2023	-6.9	-1,200	to	-2,000
2026	-4.5	-800	to	-1,200
2028	16.7	2,800	to	4,400
2031	83.0	14,000	to	22,000
2036	135.2	19,200	to	30,100
2041	205.8	25,400	to	39,900

Source: Appendix C

Leisure Goods Findings

- 6.35 The results of the NEMS Household Telephone Survey offer an indication of locations/facilities where residents of the Study Area satisfy their leisure (namely Indoor Health & Fitness, Cinema, Restaurant, Pubs/Bars/Nightclubs, ten pin bowling, Casino, bingo and family oriented activities) and cultural needs. As such, the survey enables us to analyse patterns of travel and potential deficiencies (those that are qualitative in nature) within the Council area.
- 6.36 The modelling of future commercial leisure needs cannot necessarily be based upon the same quantitative model used to estimate retail need. This is because leisure spending is not undertaken regularly and is often influenced by cultural shifts and technological advances.
- 6.37 Nevertheless, we appraise the existing provision of leisure facilities across the Council area and compare this against recognised sector 'standards' or 'benchmarks'. The completion of this 'benchmarking exercise' allows us to establish deficits and where gaps in the provision of existing facilities may be.

Existing Market Shares

- 6.38 The NEMS Household Survey asked respondents to describe their leisure and cultural activities and habits. The responses to these questions (Questions 32-42) inform our understanding of leisure trends and needs. The breakdown of the answers to these questions is set out in full at Appendix B and we extrapolate the key results here.

- 6.39 In the first instance, it is important to have an understanding of the participation rates and general popularity of leisure activities across the Study Area. In Question 32 of the Household Survey, NEMS asked respondents to identify all of the leisure activities in which they participated (respondents were allowed to identify as many options as they wished). We summarise the results in Table 6.9, which also shows the average participation rates across the UK (as derived from a sample of similar surveys undertaken by NEMS on behalf of Nexus Planning).

Table 6.9: Participation in Leisure Activities (%)

Leisure Activity	Participation in North Northamptonshire Study Area	Average Participation in the UK (derived from a sample of similar surveys)
Indoor Health & Fitness	20.9%	25.5%
Restaurants	66.0%	69.4%
Pub/bars/nightclubs/social clubs	47.7%	45.9%
Cultural activities (theatres/concert halls/museums/art galleries and others)	41.0%	42.5%
Cinema	50.1%	44.1%
Ten pin bowling	24.1%	14.3%
Bingo	5.6%	5.4%
Casino	3.0%	1.6%
Family oriented activities (soft play centres/laser quest/trampoline centres/escape rooms and others)	23.6%	N/A

Source: Appendix B

- 6.40 As evident in the figure above, the most popular leisure activity across the authority area is to go to a restaurant, which 66.0% of residents indicated they do on at least an occasional basis. The second most popular activity is going to the cinema (50.1%), followed by visits to pubs, bars, nightclubs and social clubs (47.7%). Visiting casinos (3.0%) is the least often undertaken activity, followed by bingo (5.6%).
- 6.41 Generally speaking, leisure participation rates are slightly lower when compared to our studies across the UK as a whole. However, visits to cinemas, ten pin bowling, casinos and bingo are slightly above average.
- 6.42 Leisure participation rates are broadly similar across each of the zones, although there are some slight variances. Participation rates are highest in Zones 5 and 10, but lowest in Zones 1 and 8.
- 6.43 NEMS also asked a series of questions to understand where residents usually undertake their chosen leisure activity. We examine the most popular destinations for residents of the authority area in the table below.

Table 6.10: Most Popular Leisure Destinations (%)

Leisure Activity	First Choice	Second Choice	Third Choice
Indoor Health & Fitness	Corby Town Centre (13.1%)	Wellingborough Town Centre (9.3%)	Rushden Town Centre (5.6%)
Cinema	Cineworld Rushden Lakes (36.6%)	Savoy Cinema, Corby (29.3%)	Odeon, Kettering (1.3%)
Restaurant	Rushden Lakes Shopping Centre (20.3%)	Kettering Town Centre (11.9%)	Corby Town Centre (9.8%)
Pubs/Bars/Nightclubs	Kettering Town Centre (10.9%)	Corby Town Centre (10.2%)	Wellingborough Town Centre (8.7%)
Ten pin bowling	Thunderbowl, Kettering (45.0%)	Hollywood Bowl, Wellingborough (42.5%)	Hollywood Bowl, Peterborough (4.9%)
Bingo	Castle Bingo, Corby (52.5%)	Beacon Bingo, Northampton (12.8%)	Flutters Bingo, Rushden (9.1%)
Casino	Aspers Casino, Northampton (66.7%)	Birmingham City Centre (11.1%)	Admiral Casino, Northampton (9.2%)
Cultural Activities	Central London/West End (34.1%)	Northampton Town Centre (16.3%)	Wellingborough Town Centre (8.9%)

Source: Appendix B

- 6.44 Corby, Kettering and Wellingborough are the preferred destinations for a variety of leisure activities. For bingo, casinos and cultural activities, however, there is considerable leakage outside of the authority area.

Need for Additional Leisure Facilities

- 6.45 Question 42 of the Household Survey found that nearly half of all respondents across the authority area (46.9%) did not identify any leisure facilities which they wished to see more. Such a response is slightly above our survey average across the UK (45.7%). Satisfaction with existing leisure provision was highest in Zones 11, 7 and 8, and lowest across Zones 4 and 6.
- 6.46 The top three suggestions made by respondents were more leisure facilities and activity for young children (7.1%), a swimming pool (5.3%) and a bowling alley (4.4%). This suggests there is a desire for more activities aimed towards families and children.
- 6.47 Both quantitative and qualitative improvements may therefore be welcome in the authority area. The following section examines the scale of capacity which might arise by the end of the Plan period in 2041.

Capacity for Additional Leisure Facilities

- 6.48 Having identified existing market shares and examined the demand for new facilities from the authority area residents, we consider here the potential supply-side issues for the provision of new leisure facilities. The purpose of this assessment is to examine the realism and viability of actually providing for new facilities through the Plan process in particular.
- 6.49 The findings of the NEMS Household Survey allow us to assess market shares within the authority area for a variety of leisure sectors. As such, we have undertaken a 'benchmarking' exercise by referencing the estimated increases in the authority area population. The results of the 'benchmarking' exercise have been used to inform our conclusions with regards to the prospective future need for additional commercial leisure facilities.

Health and Fitness Capacity

- 6.50 The Leisure Database Company²⁹ (May 2019) identify that the level of health and fitness clubs in the UK is higher than it has ever been before, with more clubs and more members. In terms of membership rates across the whole of the UK, the Leisure Data Base Company outlines that 15.6% of the UK's population are registered members at private health and fitness clubs meaning that 1 in every 7 people is a member of a gym. In 2019, there were in the region of 7,239 health and fitness clubs operating across the UK (up from 7,038 in 2018). The biggest area of growth has come from low-cost gyms, which account for over 35% of memberships in the private sector.
- 6.51 In 2022, Statista reported that the average size of mainstream gym, health-club and leisure centre membership in the UK was approximately 2,846 members per club. Building on this, our household survey results showed that approximately 20.9% of residents in the authority area participate in health and fitness activities. Of those, 79.9% of residents visit health and fitness facilities within the authority area. We term this the 'Authority Area retention rate' and use it as a benchmark (assumed to be constant) to underpin our assessment of the number of additional facilities that can be supported in the authority area over time.
- 6.52 In the table below we identify that the Study Area has a population of 416,024 at 2023, which is set to increase to 476,258 at 2041. Based on the current participation rates, attraction rates, and average club size membership identified above, we calculate that the authority area's residents would support around 28 large indoor health and fitness centres over the Plan period.

Table 6.11: Health and Fitness Centre Capacity

Year	Study Area Population	Regular Participants @ 20.9%	Authority Area Retention Rate @ 79.9%	Average Membership	No. of Clubs Supported in the Authority Area
2023	416,024	86,949	69,472	2,846	24.4
2026	427,683	89,386	71,419	2,846	25.1
2028	434,737	90,860	72,597	2,846	25.5
2031	444,617	92,925	74,247	2,846	26.1
2036	460,342	96,211	76,873	2,846	27.0
2041	476,258	99,538	79,531	2,846	27.9

- 6.53 Comparing capacity to supply, the results to Question 33 of the household survey showed that there are actually already as many as 28 recognised indoor health and fitness facilities within the authority area. Whilst some of those will be smaller entities, a significant number are either nationally recognised chains or Council-operated leisure centres. Therefore, this supply of indoor health and fitness facilities is observed to be plentiful choice for the residents of the authority area.

Cinema Capacity

- 6.54 The authority area has three mainstream cinemas, providing a total of 28 screens. This comprises the Savoy Cinema in Corby (six screens), the Odeon in Kettering (eight screens) and the Cineworld in Rushden Lakes (14 screens).
- 6.55 The NEMS Household Survey outlines that these three cinemas attract 86.3% of all cinema trips made by residents in the Study Area (Question 37).
- 6.56 In 2019 (before the impact of Covid-19 on the cinema industry), the UK Cinema Association identified that total UK cinema admissions were 176.1 million, equating to 2.7 trips per person. They also identified 840 cinema facilities

²⁹ State of the UK Fitness Industry 2019, Leisure Database Company, May 2019

with 4,564 screens in the UK, equating to 937,161 cinema seats in the UK. Based on this data, the UK yearly average was 38,585 cinema trips per screen.

- 6.57 As shown in the table below, in order to gauge the number of cinema screens that can be supported in the authority area over the Plan period, we have calculated the anticipated cinema attendance (based on the national average of 2.7 trips per person). We also account for the authority area's current cinema trip attraction rate and assume that this will persist over the Plan period.

Table 6.12: Cinema Screen Capacity

Year	Study Area Population	Cinema Visits per Person	Total Cinema Attendance	Authority Area Retention Rate of 86.3%	Trips per Screen	Cinema Screens Supported
2023	416,024	2.7	1,123,265	969,378	38,585	25.1
2026	427,683	2.7	1,154,744	996,544	38,585	25.8
2028	434,737	2.7	1,173,790	1,012,981	38,585	26.3
2031	444,617	2.7	1,200,466	1,036,002	38,585	26.8
2036	460,342	2.7	1,242,923	1,072,643	38,585	27.8
2041	476,258	2.7	1,285,897	1,109,729	38,585	28.8

- 6.58 Our benchmarking exercise suggests that the current provision of 28 screens is adequate for current needs, but may be lacking by the end of the plan period in 2041, as we project that the Study Area population will support a need of just under 29 screens.
- 6.59 From the responses recorded from the survey, relatively few respondents (1.6%) suggested that they would like to see more cinemas.

Ten-Pin Bowling Capacity

- 6.60 Ten-pin bowling has generally experienced a decline over the last decade, with a gradual reduction in the number of facilities. In 2014, Mintel identified that there were 5,617 bowling lanes³⁰, a decrease since 2011 where 5,773 bowling lanes were identified³¹. More recent data from 2021 suggests that this number has declined further to around 3,700 lanes across the UK³².
- 6.61 Taking into account the UK population at the time this latest data was produced (67.1 million³³), this equates to one lane for every 18,135 persons.
- 6.62 There are two dedicated ten-pin bowling facilities in the authority area: Thunderbowl in Kettering (16 lanes) and Hollywood Bowl in Wellingborough (24 lanes).
- 6.63 Thunderbowl attracts 45.0% of all trips made by residents of the Study Area, with 42.5% of trips being made to Hollywood Bowl.

³⁰ Ten-pin Bowling – UK' Mintel, May 2014

³¹ 'Ten-pin Bowling – UK', Mintel, November 2011

³² www.gotenpin.co.uk/about

³³ As identified by the Office for National Statistics' Population Estimates for the UK

Table 6.13: Bowling Lane Capacity

Year	Study Area Population	Population per Bowling Lane	Lanes Supported
2023	416,024	18,135	22.9
2026	427,683	18,135	23.6
2028	434,737	18,135	24.0
2031	444,617	18,135	24.5
2036	460,342	18,135	25.4
2041	476,258	18,135	26.3

- 6.64 The table above indicates that, based on the assumed benchmark, the Study Area's population supports around 26 lanes over the Plan period. On this basis, the current supply of 36 lanes is considered to be ample.

Restaurants, Pubs, Bars and Café Capacity

- 6.65 We have undertaken an assessment of the potential capacity for additional food and beverage floorspace across the authority area, utilising current market shares as identified through the Household Survey, population and spending growth rates and benchmarking against current levels of provision.
- 6.66 This exercise identifies the future spending available to support additional food and beverage floorspace (in the form of restaurants, pubs, bars, café etc.) over the Plan period to 2041. This approach is not prescriptive, but instead provides an indication of the scope for future development to be supported, in addition to the findings of the assessments of the key centres.
- 6.67 Experian provides localised data on spending on restaurants and cafés per capita, which includes spending on alcoholic drinks (away from home) and take-away meals. This spending was shown to be £862 per person per annum for residents in the Study Area (2021 prices).
- 6.68 Taking into account the population growth, and anticipated leisure spending growth rates (Experian Retail Planner Briefing Note 20, Figure 1a), we calculate in Table 6.14 below a total spend across the authority area of £418.7m, rising to £573.4m in 2041.
- 6.69 This spending is then attributed to the restaurant, café and bar facilities across the authority area. The household survey results (Q34 and Q35) showed that restaurants, cafés, bars and pubs within the authority area 'retained' 74.3% of their own residents spending.
- 6.70 Growing the 'benchmark' turnover of facilities from current levels on the basis of 1% per annum to account for growth through extensions and trading efficiencies over the Plan period, we find a total food and beverage spending surplus across the authority area of £17.9 m in 2026, rising to £109.1m in 2041.

Table 6.14: Restaurant, Pubs, Bars and Café Spending

Year	Authority Area Population	Spend Per Capita	Total Spend	Authority Area Retention Rate @ 74.3%	Growth in Spending	Benchmark Growth	Residual Spending
2023	416,024	£1,006.50	£418.7m	£311.1m	-	-	-
2026	427,683	£1,037.00	£443.5m	£329.5m	£18.4m	£0.6m	£17.9m
2028	434,737	£1,057.90	£459.9m	£341.7m	£30.6m	£0.6m	£30.0m
2031	444,617	£1,089.90	£484.6m	£360.0m	£48.9m	£1.5m	£47.5m
2036	460,342	£1,145.50	£527.3m	£391.8m	£80.7m	£4.1m	£76.6m
2041	476,258	£1,204.00	£573.4m	£426.0m	£114.9m	£5.9m	£109.1m

- 6.71 Adopting an average sales density of £5,000 per sq.m at 2023 (again, projected to grow in line with a 1% sales efficiency) we calculate the typical restaurant, pub, bar and café floorspace that could be supported by the

identified surplus expenditure. This is shown as being up to 3,465 sq.m at 2026, increasing to 18,236 sq.m by 2041. This should be treated only as a rough guide.

- 6.72 We are highly cognisant of the fact that the recent pandemic will have resulted in the closure of a large amount of restaurant, bar and café floorspace across the authority area. In addition to the pandemic, there has also been significant increases to business costs including energy and transport. Whilst our figures show that there is likely to be a substantial pent-up consumer demand for additional spending in this area, this does not mean that all of that demand should be met through new floorspace. The potential re-occupation of vacant floorspace should be accounted for in the first instance. The Council should also account for any existing committed leisure developments in this respect.

Table 6.15: Restaurant, Pubs, Bars and Café Capacity

Year	Residual Spending	Sales Density	Floorspace (sqm)
2026	£17.9m	£5,152	3,465
2028	£30.0m	£5,255	5,705
2031	£47.5m	£5,414	8,765
2036	£76.6m	£5,690	13,457
2041	£109.1m	£5,981	18,236

Other Leisure Uses

- 6.73 In the survey results, 41.0% of respondents participate in cultural uses (theatre/museum/art galleries), which is an average rate in comparison to our other studies. However, relatively few visits occurred within the Study Area (27.2%). A small number of respondents mentioned visiting the Castle Theatre in Wellingborough (1.4%), the Lighthouse Theatre in Kettering (0.9%) and the Corby Cube (0.7%). 34.0% of visits were made to Central London and a further 16.3% were made to Northampton Town Centre. This suggests there may be a need for more cultural facilities within the authority area.
- 6.74 The study area has a relatively high proportion of respondents who participate in bingo (5.6%). 72.3% of visits made were to bingo halls and venues within the authority area, which suggests that the authority area provides well for its residents.
- 6.75 The study area also has a relatively high level of participation in casinos (3.0%). However, no casinos are found within the authority area, with all visits to casinos taking place outside of the authority area. Accounting for 66.7% of visits, the most popular venue is Aspers Casino in Northampton.
- 6.76 68.2% of visits to family-oriented activities took place within the authority area. However, as highlighted in the survey responses at Q42, there is a desire to see more facilities aimed towards families and children.

Leisure – Summary

- 6.77 The above findings present the quantitative and qualitative capacity for new leisure development in the North Northamptonshire authority area. As we noted earlier in this Study, leisure spending is undertaken regularly and residents will often visit a variety of different facilities depending on a number of factors.
- 6.78 Responses to the household survey indicate that there is a desire to see more facilities for families and children. From a quantitative perspective, however, we have not identified any obvious gaps in leisure provision. For health and fitness facilities and bowling alleys in particular, there is ample provision.

7. Sustainable Urban Extensions and Strategic Sites

- 7.1 Aside from the area-wide assessment of capacity, the Brief also asks us to provide advice on the scale of provision which might be required to support district or local centres in each of the various Sustainable Urban Extensions (SUEs) and Strategic Sites without impacting unduly on the vitality and viability of existing town centres.
- 7.2 In undertaking this exercise, we are mindful of the ‘sustainable’ element of an SUE i.e. that the proposals should offer sustainable retail and service provision, minimising the need for extensive travel outside the SUE and maximising self-sufficiency wherever possible. This is usually taken to mean that SUEs should principally cater for the large proportion of their own ‘top-up’ food shopping and service provision (especially retail and leisure services such as cafes, hairdressers and beauty salons). It is expected that residents in most cases would still travel farther afield to higher order town centres for the majority of their comparison goods shopping. Whether an SUE would cater for main food shopping or not will be dependent on the scale of the SUE and the availability of other foodstores in the vicinity. We anticipate that similar principles will apply to the proposed Strategic Sites.
- 7.3 There are eleven proposed SUEs and Strategic Sites in the authority area of different scales. The larger SUEs are also referred to as ‘Garden Communities’ and range in scale up to 5,500 dwellings, as set out in Table 7.2 overleaf. These are at varying stages in the planning process. In keeping with the wider capacity assessment for the area as a whole, we have focussed on their delivery to the end of the Plan period at 2041. Whilst the developments (and associated population changes) are anticipated to come forward at different times, based on our knowledge of the various SUE and Strategic Sites proposals, it is assumed that each will have been completed by that point.

Population

- 7.4 In order to identify the likely future population of each proposed SUE, it is first necessary to consider the average household size of the North Northamptonshire area. Whilst housing mix will differ marginally between different SUEs, it is assumed for the purpose of our assessment that on average they will follow the North Northamptonshire average. Lower household sizes are more commonly found in town centres where apartment blocks are more commonplace. This is less the case with the proposed SUEs.
- 7.5 We derive the average household size from the 2021 mid-year North Northamptonshire household size estimates (ONS, 2021). Figure 7.1 highlights that the ONS data suggests that there is an average household size of 2.42 persons per household at 2021. We assume that this will persist to 2041.

Table 7.1: Average Household Size

Area	Population Estimate @ 2021	Households Estimate @ 2021	Average Persons Per Household
North Northamptonshire	360,381	148,900	2.42

Source: ONS, Mid-year 2021 estimates

- 7.6 By applying the appropriate average household size to the number of proposed dwellings to be accommodated in each of the SUEs and Strategic Sites, we are able to estimate the likely population of each extension. This is provided below at Table 7.2.

Table 7.2: Potential Population of each SUE/Strategic Site

SUE/Strategic Site	Proposed Dwellings @ 2041	Proposed Population @ 2041
Priors Hall	5,235	12,670
Little Stanion Village	970	2,348
Weldon Park	1,000	2,420
West Corby	4,000	9,681
Rushden East	2,500	6,051
Tresham Garden Village	1,500	3,630
Hanwood Park (Kettering East)	5,500	13,312
Desborough North	700	1,694
Rothwell North	700	1,694
Stanton Cross (Wellingborough East)	3,200	7,745
Glenvale Park (Wellingborough North)	3,000	7,261
Total	28,305	68,506

Source: Developer and Council websites.

Proposed Population @ 2041 is Average Person per Household (Table 7.1) x Proposed Dwellings @ 2041

- 7.7 It is therefore assumed that the SUEs and Strategic Sites will have a total population of around 68,500 people by 2041.
- 7.8 We recognise that the projected population increase within the planned SUEs and Strategic Sites is higher than that set out in the retail and leisure capacity exercise in chapter 6 of this report (60,234 additional persons across the Study Area by 2041).
- 7.9 However, we consider that, for the purposes of this 'broad brush' SUE and Strategic Sites capacity assessment, the higher population projection is acceptable and reflects the following factors:
- the SUE and Strategic Sites capacity assessment is indicative only and assumes that all of the proposed homes within the various SUEs and Strategic Sites will come forward and be fully occupied by 2041;
 - although it anticipates that population growth across the local authority area in the period up to 2041 will exceed past trends, the North Northamptonshire Housing and Economic Needs Assessment (HENA) of July 2023 does not take account of the planned SUEs and Strategic Sites specifically; instead it assumes that local housing need will be met over the Plan period with the SUEs and Strategic Sites being significant sources of supply³⁴; and
 - it is assumed within the assessment that the SUEs and Strategic Sites will principally cater for the large proportion of their own shopping and service provision (albeit that we would expect the remainder of that need to be met by the surrounding, principally higher order, centres).

Convenience Goods Capacity

- 7.10 Per capita convenience goods expenditure at the more recent reporting year of 2021 has then been sourced from Experian for the Zone within which each proposed SUE and Strategic Site will be located. This links to Table 1 of the main study tables at Appendix C. For example, Priors Hall is located in Zone 4 and a per capita convenience goods expenditure figure of £2,270 is therefore applied. By multiplying the estimated convenience goods per capita expenditure by the number of persons who are expected to populate each SUE and Strategic Site, an estimate of the overall convenience goods expenditure originating within the extension can be generated.

³⁴ The assessment in this section identifies the total expenditure and population that is likely to arise from the planned SUEs and Strategic Sites even if delivery is slower than anticipated.

- 7.11 The base year for the Experian expenditure data is 2021 and per capita growth forecasts are derived from Figure 7 of Experian Retail Planner Briefing Note 20 (February 2022). These are the same figures described previously at Table 5.3. These figures are appropriately adjusted for special forms of trading.
- 7.12 Using the growth rate and special forms of trading allowances, Table 7.3 provides an estimate of the convenience goods expenditure which will be generated within each SUE and Strategic Site by 2041. We have disaggregated the identified expenditure in terms of the assumed 'main food' and 'top-up' shopping expenditure in accordance with our general observation from survey evidence. We assume that 75% of spending will be apportioned to 'main food' spending with the remaining 25% apportioned to 'top-up' spending.
- 7.13 In the main, we would consider it appropriate for main food shopping needs arising from the SUEs and Strategic Sites to be directed towards existing centres and food superstores (although there may be exceptions). Accordingly, we focus here on the 'top up' shopping spend which would most appropriately be directed towards district or local centres.

Table 7.3: Estimated Available Convenience Expenditure at each SUE and Strategic Site @ 2041

SUE/Strategic Site	Total Population	Per Capita Convenience Expenditure @ 2021 (£)	Per Capita Convenience Expenditure @ 2041 (£)	Estimated Available Convenience Expenditure @ 2041 (£m)	Estimated Available 'Top up' Goods Expenditure @ 2041 (£m)
Priors Hall	12,670	2,270	2,059	26.1	6.5
Little Stanion Village	2,348	2,270	2,059	4.8	1.2
Weldon Park	2,420	2,270	2,059	5.0	1.2
West Corby	9,681	2,270	2,059	19.9	5.0
Rushden East	6,051	2,512	2,278	13.8	3.4
Tresham Garden Village	3,630	2,512	2,278	8.3	2.1
Hanwood Park (Kettering East)	13,312	2,462	2,233	29.7	7.4
Desborough North	1,694	2,462	2,233	3.8	0.9
Rothwell North	1,694	2,462	2,233	3.8	0.9
Stanton Cross (Wellingborough East)	7,745	2,430	2,204	17.1	4.3
Glenvale Park (Wellingborough North)	7,261	2,430	2,204	16.0	4.0
Total	68,506			148.3	37.1

Notes:

Populations from Table 7.2.

Per capita convenience @ 2021 taken from Table 1 of Main Study tables: Corby SUEs (Zone 4), East Northants (Zone 10), Kettering (Zone 6) and Wellingborough (Zone 9).

Per capita Convenience @ 2041 is the 2021 figure projected forwards by the annual growth forecasts in ERPPB20, Figure 7. The split between main food and top is 75%/25% based on Nexus experience and professional judgment.

- 7.14 Table 7.3 shows that around £37.1m of 'top up' spend is likely to be generated by residents of the SUEs and Strategic Sites at 2041.
- 7.15 Not all of this spend will occur locally of course. Professional judgments need to be made in respect of the proportion of available 'top up' expenditure which could reasonably be expected to be directed to local facilities within the SUE or Strategic Site as part of individuals spend, as well as any expenditure which might be attracted from adjacent areas and from passing custom.
- 7.16 From our knowledge of how households shop and their natural inclination to use facilities close to home to undertake much of their 'top up' shopping, we consider that appropriately located convenience facilities accessible to all of the planned SUEs will generally have the potential to attract around 75% of all such expenditure.

7.17 We therefore consider that the majority of the turnover of these ‘top up’ convenience stores will originate within the SUEs and Strategic Sites. However, individuals residing outside the SUEs and Strategic Sites will clearly visit these developments for various reasons (visiting friends, school, work etc), and we have therefore assumed that an added 20% of the turnover of all ‘top up’ stores within the SUEs and Strategic Sites will be ‘inflow’ from outside the SUE or Strategic Site itself.

7.18 Based on these assumptions, we set out in Table 7.4 our estimation of the available ‘top up’ expenditure which might support the SUEs and Strategic Sites in the period to 2041.

Table 7.4: Estimated Total ‘Top-up’ Convenience Goods Expenditure at each SUE @ 2041

SUE/Strategic Site	Estimated Available ‘Top up’ Goods Expenditure @ 2041 (£m)	Estimated Retention of Expenditure @ 75% (£m)	Estimated Inflow of Trade @ 20% (£m)	Total ‘Top-up’ Expenditure Available (£m)
Priors Hall	6.5	4.9	1.0	5.9
Little Stanion Village	1.2	0.9	0.2	1.1
Weldon Park	1.2	0.9	0.2	1.1
West Corby	5.0	3.7	0.7	4.5
Rushden East	3.4	2.6	0.5	3.1
Tresham Garden Village	2.1	1.6	0.3	1.9
Hanwood Park (Kettering East)	7.4	5.6	1.1	6.7
Desborough North	0.9	0.7	0.1	0.9
Rothwell North	0.9	0.7	0.1	0.9
Stanton Cross (Wellingborough East)	4.3	3.2	0.6	3.8
Glenvale Park (Wellingborough North)	4.0	3.0	0.6	3.6
Total	37.1	27.8	5.6	33.4

Notes:

Estimated available ‘Top-up’ Expenditure taken from Table 7.3

Assumed retention rate of 75% of available SUE/SS convenience goods spend + Inflow of 20% of SUE/SS derived turnover from outside SUE/SS.

7.19 The final step in our methodology is to convert the identified ‘top up’ expenditure into a floorspace estimate. In undertaking this exercise, we deploy an average sales density which is more accented towards the known sales density of traders likely to occupy smaller convenience stores (e.g. Budgens Co-op, Londis etc), potentially discount foodstores (Lidl or Aldi), or one of the ‘main four’ foodstore operators who might open a smaller format store. Using this approach, we adopt a sales density average of £8,500/sq m at 2041. The results are set out in Table 7.5 below.

Table 7.5: Estimated Floorspace Capacity for 'Top-up' Convenience Goods at SUEs and Strategic Sites @ 2041

SUE/Strategic Site	Total 'Top-up' Expenditure Available (£m)	Estimated Average Sales Density (£/sq m)	Estimated 'Top up' Convenience Goods Floorspace Capacity by 2041 (sq m)
Priors Hall	5.9	£8,500	691
Little Stanion Village	1.1	£8,500	128
Weldon Park	1.1	£8,500	132
West Corby	4.5	£8,500	528
Rushden East	3.1	£8,500	365
Tresham Garden Village	1.9	£8,500	219
Hanwood Park (Kettering East)	6.7	£8,500	787
Desborough North	0.9	£8,500	100
Rothwell North	0.9	£8,500	100
Stanton Cross (Wellingborough East)	3.8	£8,500	452
Glenvale Park (Wellingborough North)	3.6	£8,500	424
Total	33.4	£8,500	3,924

7.20 The results show that there will be an estimated £33.4m of 'top up' spend available at the SUEs and Strategic Sites by 2041 and that this will comprise around 3,900 sq m of net floorspace. This may theoretically convert to small to medium sized foodstores in the larger SUEs such as Hanwood Park or Priors Hall, though for the most part, this would be expected to provide for smaller local centre type shopping.

Comparison Goods Capacity

7.21 We carry out an almost identical assessment of SUE and Strategic Site capacity to support comparison goods in our Tables below. To highlight some of the key methodology:

- Table 7.6 lifts the comparison goods expenditure per Zone for 2021 and 2041 from Table 7b of the main study tables;
- Table 7.7 assumes that a much lower percentage of comparison goods spend generated by SUE/Strategic Site residents (5%) will be spent within the District or Local Centres. The vast majority of such spending would be expected to be carried out in higher order town centres. A similar assumption is made that an additional 10% of inflow would be generated from individuals visiting the SUE or Strategic Site from outside; and
- Table 7.8 adopts an average sales density of £5,000/sq m in line with our observed averages for comparison goods retailers in smaller local or district centres.

Table 7.6: Estimated Available Comparison Expenditure at each SUE and Strategic Site @ 2041

SUE/Strategic Site	Total Population	Per Capita Comparison Expenditure @ 2021 (£)	Per Capita Comparison Expenditure @ 2041 (£)	Estimated Available Comparison Expenditure @ 2041 (£m)
Priors Hall	12,670	2,386	3,614	45.8
Little Stanion Village	2,348	2,386	3,614	8.5
Weldon Park	2,420	2,386	3,614	8.7
West Corby	9,681	2,386	3,614	35.0
Rushden East	6,051	2,778	4,208	25.5
Tresham Garden Village	3,630	2,778	4,208	15.3
Hanwood Park (Kettering East)	13,312	2,593	3,928	52.3
Desborough North	1,694	2,593	3,928	6.7
Rothwell North	1,694	2,593	3,928	6.7
Stanton Cross (Wellingborough East)	7,745	2,534	3,839	29.7
Glenvale Park (Wellingborough North)	7,261	2,534	3,839	27.9
Total	68,506			262.0

Notes:

Populations from Table 7.2.

Per capita comparison @ 2021 taken from Table 7b of Main Study tables: Corby SUEs (Zone 4), East Northants (Zone 10), Kettering (Zone 6) and Wellingborough (Zone 9).

Per capita Comparison @ 2041 is the 2021 figure projected forwards by the annual growth forecasts in ERPPB20, Figure 7.

Table 7.7: Estimated Total Comparison Goods Expenditure at each SUE and Strategic Site @ 2041

SUE/Strategic Site	Estimated Available Comparison Goods Expenditure @ 2041 (£m)	Estimated Retention of Expenditure @ 5% (£m)	Estimated Inflow of Trade @ 10% (£m)	Total Comparison Expenditure Available (£m)
Priors Hall	45.8	2.3	0.2	2.5
Little Stanion Village	8.5	0.4	0.0	0.5
Weldon Park	8.7	0.4	0.0	0.5
West Corby	35.0	1.7	0.2	1.9
Rushden East	25.5	1.3	0.1	1.4
Tresham Garden Village	15.3	0.8	0.1	0.8
Hanwood Park (Kettering East)	52.3	2.6	0.3	2.9
Desborough North	6.7	0.3	0.0	0.4
Rothwell North	6.7	0.3	0.0	0.4
Stanton Cross (Wellingborough East)	29.7	1.5	0.1	1.6
Glenvale Park (Wellingborough North)	27.9	1.4	0.1	1.5
Total	262.0	13.1	1.3	14.4

Notes:

Estimated available Comparison Expenditure taken from Table 7.6

Assumed retention rate of 5% of available SUE/SS comparison goods spend + Inflow of 10% of SUE derived turnover from outside SUE/SS.

Table 7.8: Estimated Floorspace Capacity for Comparison Goods at SUEs and Strategic Sites @ 2041

SUE/Strategic Site	Total Comparison Expenditure Available (£m)	Estimated Average Sales Density (£/sq m)	Estimated Comparison Goods Floorspace Capacity by 2041 (sq m)
Priors Hall	2.5	5,000	504
Little Stanion Village	0.5	5,000	93
Weldon Park	0.5	5,000	96
West Corby	1.9	5,000	385
Rushden East	1.4	5,000	280
Tresham Garden Village	0.8	5,000	168
Hanwood Park (Kettering East)	2.9	5,000	575
Desborough North	0.4	5,000	73
Rothwell North	0.4	5,000	73
Stanton Cross (Wellingborough East)	1.6	5,000	327
Glenvale Park (Wellingborough North)	1.5	5,000	307
Total	14.4		2,881

7.22 The result of this exercise suggests that the SUEs and Strategic Sites would collectively be able to support around 2,900 sq m net of new comparison goods floorspace by 2041.

SUE Summary

7.23 In light for the foregoing, we have identified theoretical capacity to support the levels of floorspaces in the various SUEs and Strategic Sites shown in Table 7.9 overleaf.

7.24 In addition to the top-up and comparison goods floorspace, it would also be normal to bring forward a number of units in service retail use. These are typically classified as being in retail services (e.g. hairdressers, nail bars, dry cleaners etc), leisure services (cafes and restaurants) and financial and business services (e.g. estate agents, banks etc). These services are less easy to estimate expenditure capacity for, though Experian Goad estimate that such uses account for 7.2%, 21.8% and 2.3% of the UK centres respectively. This totals 31.3% of all floorspace across the UK. We have factored in that the proposed Local and District Centres supporting the SUEs and Strategic Sites are likely to be smaller than the UK average surveyed by Goad and might be expected to have a slightly higher proportion of service goods. We have therefore upwards adjusted the UK figure to 40% of all floorspace in the centres.

7.25 At these approximate levels of provision, we consider that there is unlikely to be any harm to existing centres. However, our figures are acknowledged as indicative and would need testing for their appropriateness through the ordinary planning process in each instance.

Table 7.9: Indicative Floorspace Capacity at each SUE and Strategic Site @2041

SUE/Strategic Site	Estimated Convenience Goods Floorspace Capacity (sq m)	Estimated Comparison Goods Floorspace Capacity (sq m)	Estimated Service Goods Floorspace Capacity (sq m)	Total Floorspace (sq m)
Priors Hall	691	504	797	1,992
Little Stanion Village	128	93	147	368
Weldon Park	132	96	152	380
West Corby	528	385	609	1,522
Rushden East	365	280	430	1,075
Tresham Garden Village	219	168	258	645
Hanwood Park (Kettering East)	787	575	908	2,270
Desborough North	100	73	115	288
Rothwell North	100	73	115	288
Stanton Cross (Wellingborough East)	452	327	519	1,298
Glenvale Park (Wellingborough North)	424	307	487	1,218
Total	3,924	2,881	4,537	11,342

8. Property Market Report - AspinallVerdi

- 8.1 Alongside this report, AspinallVerdi has produced a Property Market Report (July 2023) and a Town Centre Strategy (October 2023). The three documents work together to provide a comprehensive review of the existing position and recommendations in respect of future strategy.
- 8.2 The Property Market Report considers the national and regional property markets before focusing on the individual town centres. The assessment considers the market for retail space and other town centre uses such as office and leisure within each town centre. It also considers the market for town-centre living.
- 8.3 Building on the findings of this Retail Capacity Update, the Market Report has been undertaken to determine what opportunities there are likely to be for new development throughout the plan period (up to 2041) within these town centres. This will ensure that planned uses reflect market demand and could realistically be delivered in this timeframe. These assessments also help to show what types of development are likely to be viable and deliverable. In doing so, AspinallVerdi has identified any market constraints or issues which could be addressed or engaged with to ensure the future success of the town centres.
- 8.4 Their property market assessments initially rely on a review of available evidence and analysis of property data. This provides an understanding of market trends as well as transactions which have occurred in each of the town centres. They also identify the types of space which are available for sale and leasing. AspinallVerdi has undertaken consultations with property agents to gain an understanding of what occupiers and purchasers are seeking in the local market and whether anything could be done to address any issues constraining the market.
- 8.5 Building on that work, the Town Centre Strategy provides a summary of the property market analysis for each town centre, before setting out a commercial strategy to ensure the future success of the town centres. Initially, this involves a SWOT analysis for each of the town centres. Considering the Strengths, Weaknesses, Opportunities and Threats ensures that the strengths of the centres can be built upon and efforts can be made to address any weaknesses and help inform the Town Centre Strategy.
- 8.6 Where available, AspinallVerdi also refer to existing policy and masterplanning documents produced in respect of the various centres. This ensures their approach and recommendations are supported by our market analysis, consultations and the available existing evidence base.
- 8.7 The findings from their research and recommendations also seek to address the key questions / areas of interest specified in the brief. Notably, they highlight the following:
- The changing trends in town centres, both at national and local level;
 - Demand characteristics in key centres, with particular focus on unit sizes;
 - Advice on whether an increased mix of uses can be accepted in town centre locations;
 - Whether the loss of large units in retail centres is likely to cause adverse effects in the long term;
 - Whether applications to sub-divide large units should be resisted; and
 - Identification of regeneration opportunities, including how to repurpose vacant stock.
- 8.8 In line with the above, they conclude the respective sections by making a series of recommendations both at a high town centre wide level and at a site-specific level. This ensures that their recommendations consider the

overarching changes which may need to occur to improve perceptions of the centres and / or change the direction some of the centres are heading in, in terms of vacancies etc.

8.9 Their key conclusions are extrapolated below. We draw on these findings in concluding on Section 9 of this report.

‘Trading conditions have been difficult over the last few years due to the aftermath of the pandemic and subsequent economic shocks. The town centres across North Northamptonshire have begun to undergo structural changes as a result, due to market shifts in terms of what space is popular and which types of occupiers are taking space. Our analysis identified high vacancy rates in several of the larger centres, particularly Kettering, Wellingborough and Rushden. Property market activity within the centres was generally subdued over the past 3 years, with both letting and sales data generally behind levels seen before the pandemic and the opening of Rushden Lakes.

Discussions with agents have helped to inform our understanding of occupier requirements and it is clear that attracting branded occupiers / national multiples will continue to be challenging in the majority of the centres. As such, a number of the strategies recommended focus on the creative repurposing and repositioning of vacant units to try and bring them back into use.

Rushden Lakes has had a profound effect on the larger centres in North Northamptonshire, particularly in respect of comparison retail. Rushden Lakes is dominated by larger national multiples and in line with this, we noted a decline in the presence of these retailers in other larger centres. In addition to this, there are also a number of leisure / F&B uses present at Rushden Lakes and our review identified very low vacancy levels.

The exception to this trend was Corby, which is located the furthest from Rushden Lakes. It was noted by agents that Corby had lost fewer national multiples to Rushden Lakes and had less of an impact on footfall compared to the other larger centres.

As such, our analysis indicates that rather than attempting to compete with Rushden Lakes, it is key that the other larger centres diversify their offer. An increased provision of independent occupiers would enable the other centres to provide a unique selling point and encourage a more diverse range of consumers, increasing footfall.

A key way in which the above can be achieved is through the repositioning / repurposing of large existing vacant units. One of the key strands of the strategies recommended for the majority of the larger centres is to consider how to bring these units back into use and enable them to be re-let. Our transactional data and consultations highlighted an increased preference for smaller units from occupiers. As such, we recommend the Council consider the opportunity to sub-divide / repurpose larger vacant units to give them the best chance of being absorbed by the market. Additionally, we have recommended the Council consider the potential to take on the headlease of larger units and offer small units / pop-up space to independent / small businesses, reducing the barriers to entry into the market. This will consequently help to improve perceptions of the centres and reduce vacancy levels, whilst providing a more diverse town centre commercial offer.

The smaller centres continue to meet the needs of local people, particularly in respect of their convenience offer. On the whole, the smaller centres appear to be healthy from a commercial market perspective, with lower vacancy rates than the larger centres. Where we have identified vacancies in the smaller centres, these have tended to be larger units which are unlikely to be let in their current form and needs repurposing in order to make them attractive to the market.

The town centre strategies that we have put forward focus on a range of projects and interventions, including the potential for development and public realm improvements to help improve the attractiveness of the centres. The aim of the strategies is to build on the existing strengths of the centre (e.g. previous public real improvements / heritage assets) and suggest improvements that will help to consolidate the offer but also help to attract niche / independent operators (retail and F&B) as well as specialised markets (e.g. crafts, farmers, food). The proposals put forward in the town centre strategies are focused on helping to diversify the town centre offer by creating the conditions that will help to attract investment, including the potential for town centre living.

The Council will have a key role to play in taking forward proposals in its capacity as planning authority and enabler of regeneration. We set below the key roles that the Council will need to consider:

- **Planning** – the Council will need to determine any planning applications within the town centres and therefore will need to make sure schemes that come forward help to consolidate or improve the town centre offer. Furthermore, as policy makers, the Council will need to take the lead in developing town centre policies that reflect the emerging strategies. In particular, where there is a recommendation to prepare a masterplan for Town Centre sites the Council may need to appoint a multi-disciplinary team to assist in this process.
- **Partnership** – given a number of proposals include public realm improvements, the Council is advised to work with landowners and operators to take forward a number of the schemes, particularly where changes are proposed to the existing roads (e.g. Rushden).
- **Funding** – given the nature of the proposed projects, it is unlikely that the private sector will take the lead in bringing the schemes forward. For example, the Council may need to consider developing pipeline projects to take advantage of public sector grant funding opportunities to help facilitate delivery; this may involve the need to utilise capital receipts or other public funding resources to help unlock development. For example, for the proposed relocation of the library/community centre in Burton Latimer.
- **Landowner** – the Council owns land in a number of the centres (e.g. Kettering and Wellingborough) and may consider these assets as part of Town Centre regeneration plans.'

9. Summary, Conclusions and Policy Recommendations

Context

- 9.1 The primary focus of this Study is to establish the current position in respect of the need for additional retail and leisure facilities in North Northamptonshire, and to consider the vitality and viability of the authority's principal defined centres. The principal purpose of the commission is to inform work on updating the Joint Core Strategy through a Plan which is currently referred to as the North Northamptonshire Local Plan, and to assist in the determination of future planning applications for retail and other main Town Centre uses.
- 9.2 As part of the Study, AspinallVerdi has undertaken a property market assessment to understand the current supply and demand characteristics of the centres in North Northamptonshire, including a review of retail, leisure, food and drink, employment, cultural, community (including education and health), and residential sectors. This report has identified the potential drivers of investment and the change required for centres to fulfil their potential.
- 9.3 Based on these findings, the Study seeks to provide advice on the strategic priorities for the local authority area in light of the challenges whilst considering relevant opportunities. .
- 9.4 As such, this concluding section of our report summarises the key findings of the Study and addresses planning policy requirements of relevance to retail, leisure, and town centres.

Key Findings: Principal Centres

- 9.5 The Study has reviewed the vitality and viability of defined town and district centres across the authority area. Our assessments have been undertaken with reference to the town centre healthcheck indicators set out at paragraph 006 of the Town Centres PPG.
- 9.6 At the outset, we recognise that the introduction of the out-of-centre Rushden Lakes development, the first phase of which opened in 2017, has had a significant impact on nearby centres including Wellingborough, Kettering and Rushden – particularly in terms of their comparison goods market shares. The consequences of this development are explored in more depth in our separate Rushden Lakes Shopping Centre Impact Assessment of April 2024.
- 9.7 We set out the overarching conclusions in respect of North Northamptonshire's principal centres below. In reading these conclusions, it should be noted that the retail and leisure sectors are dynamic and constantly evolving. Therefore the commentary below should be taken as a 'snapshot' in respect of current market conditions; it will be necessary to judge future development proposals for main Town Centre uses with reference to the prevailing conditions at the time of a proposal's determination.
- 9.8 **Corby Town Centre** is one of the larger centres within the authority area, and as such provides a diverse range of retail and service operators to provide for the day-to-day needs of the local community as well as having an offering that attracts people from across North Northamptonshire.
- 9.9 Although the centre has a large offering, it would benefit from some more independent operators that offer a slightly different service to what is already there. It was also noted that there was only one national multiple supermarket in the centre, being Iceland, with an out of centre Lidl, leaving a potential opening to attract a further foodstore.
- 9.10 Corby has a lower number of vacant units in comparison to other centres, but those premises which are vacant tend to be larger units.

- 9.11 **Kettering Town Centre** is the largest centre in North Northamptonshire in respect of both unit numbers and floorspace. The Town Centre has a provision of purpose-built accommodation such as Newlands Shopping Centre, although the majority of the retail provision derives from ground floor conversions of historic buildings. The town accommodates a number of independent retailers along with a wide variety of traditional day-to-day retail and service operators.
- 9.12 Although Kettering benefits from a diverse range of retail operators, it also has a vacancy rate higher than the national average. Whilst these vacancies have been the result of wider market trends, the proportion of vacant units is such that efforts are required to diversify the offer in the centre to re-let vacant properties and also increase the footfall to ensure current and future businesses thrive.
- 9.13 Issues that were identified in the Study due to the built form and public realm in Kettering are likely to be rectified to an extent through the grant attached to the designation of the Kettering High Street Heritage Action Zone. It is unlikely this money will be the solution to all the identified issues, although it is a positive step forward.
- 9.14 The centre would appreciably benefit from improvements to the cycle infrastructure, both in terms of storage and safe cycling routes down key routes into the centre. The proximity to the local area provides an excellent base for improvements, followed by the need for secure, covered, storage for bikes at final destinations.
- 9.15 **Wellingborough Town Centre** is the second largest centre in North Northamptonshire, both in terms of number of units and floorspace. The purpose built retail accommodation in Swansgate Shopping Centre has proved attractive for national multiples in the centre, however vacancy rates are a concern. The town centre has the potential to improve on its attractiveness as a retail centre, through investment to the environmental quality and homogenisation of shop fronts to add some more interest and vibrancy to the street scene.
- 9.16 Initiatives need to be implemented to diversify the offer of units in the centre to both re-let current vacant properties, and hopefully improvements to the centre's attractiveness will drive additional footfall to support new businesses. The centre would also benefit from diversification in the offering of units, aiming to attract more national retail and food operators, along with providing space to encourage the improvement of the night time economy in Wellingborough.
- 9.17 Like with the rest of North Northamptonshire, improvements need to be made to promote active modes of transport to the centre, most notably cycling. Given the proximity of the centre to the surrounding built area, and there being very few barriers for movement, promoting cycling would have widespread positive effects.
- 9.18 **Rushden Town Centre** is a reasonably attractive retail destination, whose offer was dominated by independent retail, leisure and other service operators even before the development of Rushden Lakes, and which continues to provide for a range of predominantly non-multiples. Nexus' separate Rushden Lakes Shopping Centre Impact Assessment of April 2024 highlights that the failure of Rushden Town Centre to attract new national multiple operators since 2010, particularly in the comparison sector, partly reflects wider trends such as the impacts of Covid-19 and broader changes to the high street retail function of town centres seen over the past decade and beyond.
- 9.19 Nonetheless, it is clear that the centre has suffered as a result of the opening of Rushden Lakes, evident in the percentage of vacant units. It is unlikely the centre will attract national multiples in the future as operators look more towards Rushden Lakes, although improvements to the public realm and environmental quality in the centre could play a part in attracting new, and diverse independent retailers, ensuring the offering of unit uses does not conflict with what is on offer at Rushden Lakes.

- 9.20 **Desborough Town Centre**'s small size and local nature mean that it has the potential to offer a unique experience for visitors. However the current mix of units as well as vacancies in the centre identified at the time of our survey create a perception that it has little to offer visitors. The reoccupying of vacant units should be a priority, and initiatives should be implemented to attract more comparison units to the centre. In this regard, we note that comments made by Councillors during the preparation of this report suggest that the number of vacancies in Desborough has declined considerably since the time of our fieldwork, which is an encouraging sign.
- 9.21 Desborough would also hugely benefit from some additional crossing points, particularly to the north outside the Co-op to provide safe access for pedestrians into the centre. Whilst aiming to reoccupy units in the centre, it should be understood if the parking provisions in the centre are currently coping and if more needs to be done to enhance provisions. Unless there is adequate parking in the centre, new businesses are unlikely to survive without the footfall.
- 9.22 **Burton Latimer Town Centre** is a pleasant centre due to its general aesthetic, low vacancy rate, easy accessibility by car and low crime rates. Additionally, the centre has a proportionally large number of leisure uses.
- 9.23 However, we assume that the centre does depend on its proximity to Kettering and Wellingborough due to the low number of comparison goods units. Also, the range of leisure uses could be varied to provide a more comprehensive leisure offer.
- 9.24 **Higham Ferrers Town Centre** is one of the most characterful centres of the study, made possible by its high level of environmental quality. Given its proximity to Rushden Lakes, the centre provides an excellent example of the type of unit offerings that are needed to create a vibrant economy in the smaller centres. Parking provision likely requires improvement. However this could only be confirmed by assessing if there are any issues at peak times.
- 9.25 **Irthlingborough Town Centre** is of a size that leaves the potential for it to attract a better range of shops, ensuring the offering is entirely different to what can be found at Rushden Lakes. However, initiatives need to be brought into place to make this possible. The large vacant units on High Street would benefit from improvements, such as sub-division to make for more appropriately sized units and potentially renting them at lower rates for a while to initially attract new businesses. Reducing the vacancy rate in the centre will also play a part in creating more active frontages, in turn reducing crime.
- 9.26 Of all the centres, Irthlingborough has a very high amount of managed public green space, with provisions that should set a precedent for other centres as a use for brownfield sites to improve their overall environmental quality.
- 9.27 **Oundle Town Centre** is a particularly attractive centre in North Northamptonshire, with a high level of architectural merit that has made for a distinctly characterised centre. The centre has a lower than average vacancy rate, with a majority of units occupied by independent retailers, with very few repetitions of business classes. Although it is attractive in character, it does not present an attractive provision of public transport meaning that accessibility is limited to private vehicles. Although, at the time of our visit, this did not appear to be a problem.
- 9.28 **Raunds Town Centre** is a small centre serving a reasonably large local community. Nonetheless, the centre is lacking a diverse offering of businesses, with high concentrations of hairdressers, beauty salons and restaurants/take aways. With a number of vacant units, initiatives to improve the offer of comparison stores would play a part in creating a more vibrant centre.

- 9.29 Raunds is also highly dispersed as centres go, with irregular clusters of units, making for limited homogenisation in façade design. This is something that would benefit from improvement, so as visitors move between units, they still experience a sense of place, feeling as if they are in Raunds.
- 9.30 **Rothwell Town Centre**, as a centre serving its immediate local population, carries out its function well. The centre has a range of convenient uses and is accessible by bus routes. Additionally, the active frontages and frequent markets give a community feel and sense of vibrancy in the centre. However, pedestrian infrastructure and measures to reduce the crime rate could be pursued.
- 9.31 **Thrapston Town Centre** has the best occupancy rates of all the centres in North Northamptonshire. There is overall a high level of vibrancy in the Town due to a diverse range of unit occupiers and distinct architectural style. This success appears to not have been impacted from the opening of Rushden Lakes, and it is one of the few centres of the study where this can be said. This is likely due to the distance from Rushden Lakes, meaning local residents still benefit from having a local centre to meet their day to day needs.
- 9.32 The levels of safety in Thrapston, along with the public realm in the centre both require improvements, although they do both only require quite simple initiatives for improvement.
- 9.33 **Rushden Lakes** is not a defined centre in North Northamptonshire, but we have conducted a healthcheck to understand its offering, and how its development has impacted the medium and large centres in the region. Rushden Lakes is dominated by comparison and leisure services. Of these units, a vast majority are popular national multiples, and the development has a low vacancy rate. Although Rushden Lakes itself is thriving, there is no doubt that its opening in 2017 has had a detrimental impact on the closest main town centres.

Key Findings: Retail

Quantitative and Qualitative Capacity

- 9.34 As identified at Section 6 and summarised in Table 9.1 below, once commitments are taken into account, we do not identify any quantitative capacity for additional convenience or comparison goods floorspace across the authority area in the short-term.

Table 9.1: Quantitative Capacity for Convenience Goods and Comparison Goods Floorspace in North Northamptonshire

Year	Minimum Convenience Goods Floorspace Requirement (sq.m)	Maximum Convenience Goods Floorspace Requirement (sq.m)	Minimum Comparison Goods Floorspace Requirement (sq.m)	Maximum Comparison Goods Floorspace Requirement (sq.m)
2023	-2,600	-4,400	-1,200	-2,000
2026	-2,100	-3,500	-800	-1,200
2028	-1,500	-2,600	2,800	4,400
2031	-500	-900	14,000	22,000
2036	1,200	2,100	19,200	30,100
2041	3,100	5,200	25,400	39,900

Source: Table 6d and 27d of Appendix C

Note: In 2021 prices

- 9.35 In terms of convenience goods, there is negative capacity for convenience floorspace up to 2031, although by the end of the plan period the quantitative capacity for the authority area as a whole is calculated to be between 3,100 sqm and 5,200 sqm net in 2041.
- 9.36 Turning to comparison goods, the commitments extinguish any quantitative need for additional comparison goods floorspace in the early part of the plan period. By 2041, however, we estimate there will be between 25,400 sqm net and 39,900 sqm net of comparison floorspace capacity across the authority area.

- 9.37 An identified quantitative retail capacity across the area does not necessarily justify the allocation of new retail floorspace in and of itself (especially in out-of-centre locations) where there may not also be a qualitative need. As we have highlighted previously, forecasting as far away as 2041 must be treated with some caution, as there will be economic, political and technological unknowns that will intervene over that period. Moreover, capacity modelling should not be seen as an absolute; it is a guide.
- 9.38 Any allocations for new retail floorspace should also take into account the assessment of the performance, vitality and viability of the qualitative health of a centre to ensure that any identified capacity meets both a quantitative and qualitative need.
- 9.39 Equally, in relation to decision taking, the lack of significant demonstrable quantitative capacity should not necessarily prevent the Councils from allowing new applications for retail development in existing designated centres, particularly where such developments would bolster the draw of such centres and encourage growth in line with the Council's aspirations and the centre's position within the retail hierarchy.
- 9.40 We would also stress that, in accordance with national planning policy and guidance, applications for retail developments above the locally set threshold (which we go on to consider below) and outside of the designated primary shopping area boundaries would need to be considered in accordance with the sequential approach and retail impact assessment methodology.

Key Findings: Commercial Leisure

- 9.41 The NEMS household survey that underpins this Study asked respondents to describe their leisure and cultural activities and habits. Based on the participation rates identified by the survey, we have undertaken a quantitative benchmarking exercise to identify general requirements in respect of large format leisure uses.
- 9.42 This has identified quantitative capacity which equates to a requirement across the North Northamptonshire authority area at 2041 for:
- 27.9 health and fitness centres, compared to a current supply of at least 28 facilities recognised by the survey;
 - 28.8 cinema screens, compared to a current supply of 28 screens; and
 - 26.3 ten pin bowling lanes, compared to a current supply of 36 lanes.
- 9.43 Thus, the Study finds that North Northamptonshire is generally well provided for in terms of the leisure facilities identified above, although there may be a need for an additional cinema screen by the end of the plan period in 2041.
- 9.44 There is potential for a cinema screen within the authority area as part of a flexible arts venue or as a single screen independent to secure the re-use of an existing building. We believe that any such opportunity would be operator or venue-led and we do not believe that it is necessary for the Council to proactively plan to accommodate any such use in practice.
- 9.45 In terms of food and beverage floorspace, we have undertaken a quantitative assessment which identifies available expenditure and takes account of the need for existing businesses to increase their turnover to remain viable.
- 9.46 As set out in Table 9.2, our assessment has identified that at 2041 there is a requirement for 18,236 sq.m of restaurant, pub, bar and café floorspace.

Table 9.2: Quantitative Capacity for Restaurant, Pubs, Bars and Café Floorspace in North Northamptonshire

Year	Restaurant, Pubs, Bars and Café Floorspace Requirement (sq.m)
2026	3,465
2028	5,705
2031	8,765
2036	13,457
2041	18,236

Note: Assumes constant market share (74.3%) of Study Area expenditure claimed by facilities in the North Northamptonshire authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 2 of Experian Retail Planner Briefing Note 20.

9.47 We anticipate that this floorspace will comprise of relatively small-scale cafés, restaurants and bars which would generally be accommodated within the principal centres in the authority area.

9.48 Turning to other leisure uses, the survey results identified that:

- relatively few visits to cultural facilities (theatres/museums/art galleries) were made within the Study Area, suggesting there may be a need for more of these uses within North Northamptonshire;
- a relatively high proportion of respondents participate in bingo, with the majority of visits to bingo halls and venues being made within the authority area, suggesting that the current provision is ample;
- the proportion of residents that participate in casinos is relatively high, but there are no casinos within the authority area and thus all visits are made outside North Northamptonshire (with the most popular venue being Aspers Casino in Northampton); and
- when residents were asked to identify the types of leisure facility which they wished to see more, the most popular answers were: more leisure facilities and activity for young children, a swimming pool and a bowling alley – suggesting that there is a desire for more activities aimed towards families and children.

9.49 Notwithstanding the findings set out above, it is important to recognise that the provision of such leisure facilities is generally subject to market forces dictating demand, in order to meet any perceived gaps in leisure provision. As such, we would recommend that the Council does not plan for (i.e. specifically allocate) additional large-scale facilities, but that any proposals in suitable and sustainable locations be assessed on their own merit, subject to relevant planning considerations.

Sustainable Urban Extensions and Strategic Sites

9.50 Aside from the area-wide assessment of capacity, the Study Brief asks us to provide advice on the scale of provision which might be required to support district or local centres in the planned Sustainable Urban Extensions (SUEs) and Strategic Sites within the authority area without impacting unduly on the vitality and viability of existing town centres.

9.51 Our ‘broad brush’ assessment assumes that:

- the SUEs and Strategic Sites will principally cater for the large proportion of their own ‘top-up’ food shopping and service provision (especially retail and leisure services such as cafes, hairdressers and beauty salons), albeit that residents in most cases would still travel farther afield to higher order town centres for the majority of their comparison goods shopping and main food shopping needs would be directed towards existing centres and food superstores (although there may be exceptions); and
- all of the proposed homes within the various SUEs and Strategic Sites will come forward and be fully occupied by 2041.

- 9.52 With regard to convenience goods, we estimate that the available 'top up' spend available at the SUEs and Strategic Sites by 2041 will result in a capacity of around 3,900 sq.m of net floorspace. This may theoretically convert to small to medium sized foodstores in the larger SUEs such as Hanwood Park or Priors Hall, though for the most part, this would be expected to provide for smaller local centre type shopping.
- 9.53 In terms of comparison goods, our assessment suggests that the SUEs and Strategic Sites would collectively be able to support around 2,900 sq.m net of new floorspace by 2041.
- 9.54 We anticipate that the SUEs and Strategic Sites will also provide for retail services (e.g. hairdressers, nail bars, dry cleaners etc), leisure services (cafes and restaurants) and financial and business services (e.g. estate agents, banks etc), with the estimated capacity amounting to approximately 4,500 sq.m by 2041.
- 9.55 At these approximate levels of provision, we consider it unlikely that there would be any harm to existing centres. However, our figures are acknowledged as indicative and would need testing for their appropriateness through the ordinary planning process in each instance.

Table 9.3: Quantitative Capacity for Convenience, Comparison, and Service Goods Floorspace in the Planned SUEs and Strategic Sites at 2041

SUE/Strategic Site	Estimated Convenience Goods Floorspace Capacity (sq m)	Estimated Comparison Goods Floorspace Capacity (sq m)	Estimated Service Goods Floorspace Capacity (sq m)	Total Floorspace (sq m)
Priors Hall	691	504	797	1,992
Little Stanion Village	128	93	147	368
Weldon Park	132	96	152	380
West Corby	528	385	609	1,522
Rushden East	365	280	430	1,075
Tresham Garden Village	219	168	258	645
Hanwood Park (Kettering East)	787	575	908	2,270
Desborough North	100	73	115	288
Rothwell North	100	73	115	288
Stanton Cross (Wellingborough East)	452	327	519	1,298
Glenvale Park (Wellingborough North)	424	307	487	1,218
Total	3,924	2,881	4,537	11,342

Policy Recommendations/Strategy

- 9.56 Alongside this report, AspinallVerdi has produced a Property Market Report (July 2023) and a Town Centre Strategy (April 2024). The three documents work together to provide a comprehensive review of the existing position and recommendations in respect of future strategy. We draw on AspinallVerdi's findings in making the following recommendations in respect of town centre policy and strategy.

Meeting North Northamptonshire's Needs

- 9.57 In addition to the capacity exercise focused around retail and leisure uses, summarised above, we have utilised the household survey and the work undertaken in respect of the Town Centre Strategies to establish where there is scope to introduce alternative town centre uses.
- 9.58 AspinallVerdi's and our own analysis has recorded relatively high vacancy rates in the larger centres of Kettering, Wellingborough and Rushden. Given the difficulties in attracting branded occupiers/national multiples in the majority of North Northamptonshire's centres, particularly those comparison retailers and food and beverage

operators that have a presence at Rushden Lakes, a number of the strategies recommended by AspinallVerdi focus on creative repurposing and repositioning of vacant units to try and bring them back into use.

- 9.59 The exception to this trend is Corby, where comparison retail has fared better than in other centres, due primarily to its location further away from Rushden Lakes.
- 9.60 Rather than trying to compete with Rushden Lakes, the recommended strategy focusses on diversifying the offers of North Northamptonshire's centres, promoting increased provision of independent occupiers which will provide a unique selling point, encourage a more diverse range of consumers and increase footfall.
- 9.61 A key way to achieve this goal in the majority of the larger centres is through the repositioning and repurposing of existing vacant units to bring them back into use and enable them to be re-let. Given that occupiers generally prefer smaller units, we recommend the Council consider the opportunity to sub-divide/repurpose larger vacant units to give them the best chance of being absorbed by the market.
- 9.62 Additionally, we recommend that the Council consider the potential to take on the headlease of larger units and offer small units/pop-up space to independent/small businesses, reducing the barriers to entry into the market. This will consequently help to improve perceptions of the centres and reduce vacancy levels, whilst providing a more diverse town centre commercial offer.
- 9.63 The smaller centres continue to meet the needs of local people, particularly in respect of their convenience offer. On the whole, the smaller centres appear to be healthy from a commercial market perspective, with lower vacancy rates than the larger centres. Where we have identified vacancies in the smaller centres, these have tended to be larger units which are unlikely to be let in their current form and need repurposing in order to make them attractive to the market.
- 9.64 The town centre strategies put forward by AspinallVerdi focus on a range of projects and interventions, including the potential for development and public realm improvements to help improve the attractiveness of the centres. The aim of the strategies is to build on the existing strengths of the centre and suggest improvements that will help to consolidate the offer but also help to attract niche/independent operators (retail and food/beverage) as well as specialised markets. The proposals put forward in the town centre strategies are focused on helping to diversify the town centre offer by creating the conditions that will help to attract investment, including the potential for town centre living.
- 9.65 The Council will have a key role to play in taking forward proposals in its capacity as planning authority but also as a landowner in certain towns (e.g. Kettering and Wellingborough). We set below the key roles that the Council will need to undertake:
- **Planning** – the Council will need to determine any planning applications within the town centres and therefore will need to make sure schemes that come forward help to consolidate or improve the town centre offer. Furthermore, as policy makers, the Council will need to take the lead in developing town centre policies that reflect the emerging strategies. In particular, where there is a recommendation to prepare a masterplan for Town Centre sites the Council may need to appoint a multi-disciplinary team to assist in this process.
 - **Partnership** – given a number of proposals include public realm improvements, the Council is advised to work with landowners and operators to take forward a number of the schemes, particularly where changes are proposed to the existing roads (e.g. Rushden).
 - **Funding** – given the nature of the proposed projects, it is unlikely that the private sector will take the lead in bringing the schemes forward. For example, the Council may need to consider developing pipeline projects to

take advantage of public sector grant funding opportunities to help facilitate delivery; this may involve the need to utilise capital receipts or other public funding resources to help unlock development. For example, for the proposed relocation of the library/community centre in Burton Latimer.

- **Landowner** – the Council owns land in a number of the centres (e.g. Kettering and Wellingborough) and may consider these assets as part of Town Centre regeneration plans.

Town Centre Boundaries

- 9.66 Paragraph 90 of the NPPF requires local plans to **‘define the extent of town centres and primary shopping areas’**.
- 9.67 National planning policy no longer explicitly prescribes the designation of primary and secondary frontages. The Government has confirmed that the removal of this requirement reflects the general need to be flexible in planning for the future of town centres due to the rapid changes taking place in the retail and leisure industries. Whilst the removal of the requirement does not preclude local planning authorities from identifying primary and secondary shopping frontages where supported by local circumstances, we do not believe that this is merited in this instance. There is a clear need to repurpose and reoccupy centres across both authority areas in the manner that Use Class E generally provides for. In this context, the separate designation of both primary and secondary frontages would serve no useful purpose. Instead, where appropriate, we recommend a single defined ‘primary shopping area’.
- 9.68 Annex 2 of the NPPF indicates that a primary shopping area is the **‘Defined area where retail development is concentrated’**.
- 9.69 Annex 2 also identifies that a town centre is the:
- ‘Area defined on the local authority’s policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in the development plan, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.’**
- 9.70 Annex 2 further defines main town centres uses as:
- ‘Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).’**
- 9.71 In this context, it is important to note that, although there is the opportunity to define separate primary shopping areas and town centre boundaries, there is no general requirement to do so unless the specific characteristics of the subject centre support such an approach. Government policy specifically encourages the diversification of centres. Whilst retail will (in most cases) be a key element of a town centre, the majority of lower-order centres are diverse and uses are typically distributed throughout the centre. Such centres may not have a particular concentration of retail uses at their core.
- 9.72 Furthermore, it is also important to recognise the purpose of defining both a primary shopping area and town centre boundary. In planning policy terms, distinguishing between the primary shopping area and town centre boundary is of principal merit in terms of identifying the area of relevance in applying the sequential and impact tests to retail development. The particular relevance of the primary shopping area to retail planning proposals is confirmed by Annex 2 of the NPPF.

- 9.73 We have reviewed the current and proposed boundaries of the defined growth and market town centres and provide our commentary on a centre-by-centre basis at Table 9.4 below.
- 9.74 As identified above, we believe that any existing primary and secondary frontages should not be maintained going forward given the provisions of Class E of the Use Classes Order and the Government's general objective that there should be greater flexibility on the high street.

Table 9.4: Summary of Boundary Recommendations for Defined Centres

Centre	Recommendations
Wellingborough	We suggest omitting an area south of St John's Street to the north of the centre. Once you pass High Street Congregational Church, businesses become far more dispersed in between housing at the top of High Street and especially along the southern parts of St John's Street.
Irthlingborough	Once you are just past Spinney Road in Irthlingborough, any remaining units with town centre uses become largely dispersed between housing, and are not in high concentration, and therefore we recommend that the boundary is reduced to concentrate the town centre.

- 9.75 These proposed boundary amendments are illustrated at **Appendix F**.

Impact Threshold

- 9.76 Paragraph 90 of the NPPF indicates that it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail and leisure development which should be the subject of impact assessment. Any such threshold policy applies to the impact test only (all planning applications for main town centre uses which are not in an existing centre and not in accordance with an up-to-date development plan should be the subject of the sequential test).³⁵
- 9.77 The purpose of applying an impact threshold within the development plan which deviates from the national threshold of 2,500 sq.m is to allow the Council to retain appropriate control in respect of the potential for development to impact on the future health of defined centres within the authority area. By applying a lower threshold, applications for developments which could potentially have a harmful effect on the overall vitality and viability of a defined centre, will need to be supported by a proportionate impact assessment which sets out the potential trade diversion impact assumptions.
- 9.78 Paragraph 16 of the Town Centres PPG provides specific guidance in relation to floorspace thresholds and states:
- 'The impact test only applies to proposals exceeding 2,500 square metres gross of floorspace unless a different locally appropriate threshold is set by the local planning authority. In setting a locally appropriate threshold it will be important to consider the:**
- **scale of proposals relative to town centres**
 - **the existing viability and vitality of town centres**
 - **cumulative effects of recent developments**
 - **whether local town centres are vulnerable**
 - **likely effects of development on any town centre strategy**
 - **impact on any other planned investment.'**

³⁵ With the exception (in accordance with paragraph 89 of the NPPF) of small-scale rural office proposals and other small scale rural development.

- 9.79 Using the above guidance, we set out the justification to support our view that a lower threshold should be applied across the hierarchy of centres within the authority area.
- 9.80 In considering the setting of a local impact threshold, it is important to give consideration to the type of development (relating to convenience and comparison goods retail uses, and leisure uses) which would, in practice, provide space for key operators who could act to 'anchor' a centre. Should one of these anchor units or operators leave a centre, there will likely be the potential for a significant adverse impact to arise.
- 9.81 As such, where there is genuine potential for an application proposal to divert a material level of expenditure away from a defined centre, or potentially remove a key tenant from that centre, there will likely be a requirement to consider the impacts arising from the proposal in detail.
- 9.82 In respect of North Northamptonshire's town centres, the introduction of even a small convenience store nearby (of the type operated by Sainsbury's Local or Tesco Express) may have the potential to impact on the ongoing viability of key operators. Small convenience stores operated by national multiple grocers can generate a relatively substantial turnover. If this is diverted from existing retailers in defined centres, the impact on the overall vitality and viability through the loss of spend and footfall, could be of a significant adverse magnitude.
- 9.83 Therefore, in implementing a local threshold policy, it is considered more appropriate to apply a range of thresholds in accordance with the type of centre to which the proposed development is proximate. The thresholds should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate or trade in practice.
- 9.84 We note that the current adopted local policies set out a range of impact thresholds for the various centres across the different parts of North Northamptonshire, as set out at paragraph 3.27 and summarised in Table 9.5 overleaf.

Table 9.5: Locally Set Impact Thresholds in Adopted Planning Policy

Town Centre	Relevant Adopted Policy	Type of Development Outside a Centre to which Threshold Applies	Local Impact Threshold (sq.m gross)
Growth Towns			
Wellingborough	Policy R3, Wellingborough Local Plan (Part 2)	Retail, leisure and office	1,000
Kettering	Policy TCE5, Kettering Site Specific Part 2 Local Plan	Retail, leisure and office	750
Corby	Policy 19, Part 2 Local Plan for Corby	Retail and leisure	400
Rushden	Policy EN19, East Northamptonshire Part 2 Local Plan	Retail	280
Market Towns			
Rothwell	Policy TCE5, Kettering Site Specific Part 2 Local Plan	Retail, leisure and office	500
Burton Latimer	Policy TCE5, Kettering Site Specific Part 2 Local Plan	Retail, leisure and office	400
Desborough	Policy TCE5, Kettering Site Specific Part 2 Local Plan	Retail, leisure and office	300
Higham Ferrers	Policy EN19, East Northamptonshire Part 2 Local Plan	Retail	100
Irthlingborough	Policy EN19, East Northamptonshire Part 2 Local Plan	Retail	100
Oundle	Policy EN19, East Northamptonshire Part 2 Local Plan	Retail	100
Raunds	Policy EN19, East Northamptonshire Part 2 Local Plan	Retail	100
Thrapston	Policy EN19, East Northamptonshire Part 2 Local Plan	Retail	100

- 9.85 The appropriateness of locally set impact thresholds in the local plan-making context was most recently considered in relation to the Examination of the East Northamptonshire Part 2 Local Plan (ENLPP2) adopted on 7th December 2023. The ENLPP2 is a legacy document covering that part of the North Northamptonshire district that was previously administered by the now abolished East Northamptonshire Council, which contains the Growth Town of Rushden and the Market Towns of Higham Ferrers, Irthlingborough, Oundle, Raunds and Thrapston.

- 9.86 The ENLPP2 sets retail impact thresholds of 280 sq.m for developments outside the town centre boundaries of Rushden, and 100 sq.m for developments outside the town centre boundaries of the relevant Market Towns. The rationale and justification for these thresholds was set out in Background Paper 7, which was produced by the Council's Principal Planning Policy Officer in January 2021 as part of the plan-making process.³⁶
- 9.87 Background Paper 7 reports the key findings of a detailed survey of Raunds town centre undertaken by Raunds Town Council as part of the evidence-gathering process for its Neighbourhood Plan. It also considers the implications of changes made to the Use Classes Order in September 2020 in response to the Covid-19 pandemic. The Background Paper found that:
- Raunds town centre is particularly sensitive to the loss of retail uses from the town centre, due to the large number of small units (with the majority of retail properties within the town being less than 150 sq.m in size); and that
 - at this time, all of the retail developments recently consented and/or constructed outside of town centre boundaries in the East Northamptonshire district measured less than the Government's default impact threshold of 2,500 sq.m.
- 9.88 Thus, the proposed (and subsequently adopted) threshold of 100 sq.m for the Market Towns recognised the acute concerns expressed by the Town Council in the Raunds case study regarding the loss of smaller retail units.
- 9.89 The 280 sq.m threshold for Rushden acknowledged its Growth Town status and reflected the statutory Sunday trading threshold. The Background Paper explained that:
- 'The example of the Sainsbury's convenience store (out of centre) at 100 High Street South... was considered. This 372m² gross floorspace development is restricted by the "Sunday trading law" (maximum 280m² floorspace); whereby Sunday opening times are restricted to 7 hours. The 280m² threshold provides a defensible (legal) distinction between purely local retail premises (i.e. small shops) and those with wider economic effects.'**
- 9.90 In her July 2023 Report on the Examination of the ENLPP2³⁷, the Local Plan Inspector considered the evidence presented in Background Paper 7 and the suitability of thresholds proposed. She concluded at paragraph 190 that:
- 'The thresholds have been set on the basis of analysis in the Retail Impact Assessments Threshold Background Paper (BP7) which concluded that lower thresholds would be appropriate in the market towns due to the sensitivity of these locations to the cumulative loss of smaller units. The slightly higher Rushden threshold of 280 sqm reflects its status as a growth town and the Sunday trading threshold. Whilst Rushden is the largest traditional town centre it is, nevertheless, vulnerable to national retail trends and must also compete with Rushden Lakes. Consequently, I consider that the thresholds are appropriate.'**
- 9.91 More up-to-date evidence gathered for this Retail Capacity Update report demonstrates that a number of the conclusions that applied to the Raunds and Rushden case studies apply across North Northamptonshire.
- 9.92 The 'Market Towns' of Burton Latimer, Desborough, Higham Ferrers, Irthlingborough, Oundle, Raunds, Rothwell and Thrapston are generally anchored by one or two national multiple convenience stores (usually a Co-op). These operators underpin the function of these centres, drawing in custom and encouraging linked trips to the other parts of the centre. Should the viability of such stores be impacted, there is a real risk of the role of the wider centre being undermined.
- 9.93 Experian/Goad has published floorspace data for the Market Towns of Oundle, Raunds and Thrapston, which are considered to be a representative sample. The data (as updated by our own healthcheck surveys) show that the

³⁶ Available here: https://www.east-northamptonshire.gov.uk/downloads/file/12108/background_paper_7_-_retail_impact_assessment_thresholds [accessed 2 February 2024].

³⁷ Available here: https://www.east-northamptonshire.gov.uk/downloads/file/12699/inspectors_final_report [accessed 2 February 2024].

majority (83%) of units within these centres measure 150 sq.m or less, and that overall the level of retail floorspace is considerably less than within the Growth Towns.

9.94 Table 9.6 sets out the average unit size in various categories in the Growth Towns and the Market Towns. The table shows that the average unit size within the Market Towns is 130 sq.m.

9.95 Convenience units have the largest average size, of 274 sq.m. However, this higher average reflects the dominance of the three Co-op stores in Oundle (1,130 sq.m), Thrapston (1,050 sq.m), and Raunds (930 sq.m). These foodstores are the largest units in all three town centres and, when they are removed from the calculation, the average size of a convenience unit within the Market Towns falls to 127 sq.m. Accordingly, in the local context, 100 sq.m constitutes a significant unit for the Market Towns.

Table 9.6: Average Unit Sizes in North Northamptonshire's Growth Towns and Market Towns (Source: Experian/Goad)

Category	Growth Towns (Sq.m)	Market Towns (Sq.m)
Convenience	377	274
Comparison	314	115
Retail Services	96	78
Leisure Services	244	128
Financial & Business Services	154	83
Vacant	230	102
Average	236	130

9.96 In the Growth Towns of Corby, Kettering, Wellingborough and Rushden, a similar majority of units (84%) measure 280 sq.m or less. Units that exceed this threshold include a number of larger format leisure units, as well as retail units which accommodate national retailers (particularly 'Big 4' supermarkets like the Morrisons superstores in Wellingborough, and Kettering and the Sainsbury's and Asda supermarkets in Kettering and Rushden respectively).

9.97 Thus, the average size of a convenience unit with the Growth Towns is 377 sq.m and the average overall commercial unit size is 236 sq.m.

9.98 Tables 6c and 27c in Appendix C to this report set out our understanding of the extant convenience and comparison goods commitments in the North Northamptonshire area, which are summarised in Table 9.7.

9.99 Table 9.7 shows that all of the recent retail planning permissions within North Northamptonshire relate to developments with a gross floorspace below the default NPPF impact threshold of 2,500 sq.m. Moreover, a number of the committed proposals are similar in scale to the size of units available in the town centres (particularly the Growth Towns). These findings lend weight to our conclusion that a lower impact threshold should be sought.

Table 9.7: Floorspace of Extant Convenience and Comparison Goods Commitments

Location	Reference	Proposal	Gross Floorspace (sq.m)	Net Sales floorspace (sq.m)	Net Convenience Goods floorspace (sq.m)
Priors Hall	19/00071/REM	Construction of; a food store (A1), 10 commercial units (A1-A5, D1, B1), a gymnasium (D2)	764	649	584
Magnetic Park	NK/2021/0967	Erection of a new foodstore (Use Class E)	1,647	1,038	674
West Corby SUE	17/00180/OUT	Outline application for a sustainable urban extension (1,150sqm convenience and 1,000sqm comparison).	1,150	748	673
Priors Hall Zones 2 and 3	19/00351/OUT	Application for outline planning permission for the development of a mixed use urban extension (up to 1,000m2 of A1-A5, D1 and D2 uses within two local centres)	700	595	536
Little Stanion	17/00702/DPA	Full Planning Application for the erection of 66 two bedroomed apartments, 598sqm of retail falling within use classes A1,A2,A3,A4 and A5.	299	150	135
			4,560	3,179	2,601

Location	Reference	Proposal	Gross Floorspace (sq.m)	Net Sales floorspace (sq.m)	Net Comparison Goods floorspace (sq.m)
Priors Hall	19/00071/REM	Construction of; a food store (A1), 10 commercial units (A1-A5, D1, B1), a gymnasium (D2)	346	294	294
West Corby SUE	17/00180/OUT	Outline application for a sustainable urban extension (1,150sqm convenience and 1,000sqm comparison).	1,150	978	978
Priors Hall Zones 2 and 3	19/00351/OUT	Application for outline planning permission for the development of a mixed use urban extension (up to 1,000m2 of A1-A5, D1 and D2 uses within two local centres)	300	255	255
Little Stanion	17/00702/DPA	Full Planning Application for the erection of 66 two bedroomed apartments, 598sqm of retail falling within use classes A1,A2,A3,A4 and A5.	299	254	254
Total			2,095	1,781	1,527

9.100 Moreover, the healthcheck findings set out in Section 4 of this report list the stated requirements of national multiple retail or leisure businesses for new units in each town centre, as derived from www.therequirementlist.com. Whilst this list can only be indicative, and does not indicate concrete demand, it is though helpful in understanding the range of operators who might wish to open new premises in the North Northamptonshire area in the near future.

9.101 As can be seen from Table 9.8, the majority of the retail and leisure operators with requirements in the district are seeking floorspace which would otherwise not qualify for retail impact assessment at the national threshold if it were to be brought forward outside one of the town centres. Several of the operators seek sites/premises of a size that is similar to the average unit within the existing centres; the average minimum site size for comparison retailers who seek sites in the Growth Towns is 236 sq.m and, on average, leisure occupiers seek units with a minimum size of 270 sq.m in the Growth Towns.

Table 9.8: Operator Requirement List for Town Centres Across North Northamptonshire

Town Centre	Occupier	Description	Category	Size (min) sq.m	Size (max) sq.m
Growth Towns					
Corby	City Electrical Factors	Electrical Wholesaler	Comparison Retail	255	557
Kettering	Age UK	Charity	Comparison Retail	130	743
Kettering	Aldi	Supermarket	Convenience Retail	1,672	2,044
Kettering	Angling Direct	Fishing store	Comparison Retail	325	465
Kettering	Dunkin'	Donut and Coffee Company	Leisure	19	186
Kettering	Just for Pets	Pet Retailer	Comparison Retail	232	604
Kettering	Kaspas	Gelato and Dessert House	Leisure	232	465
Kettering	KFC	Fast Food Restaurant	Leisure	167	325
Kettering	Lidl	Supermarket	Convenience Retail	1,672	2,415
Kettering	M&S Food	British Multinational Retailer	Convenience Retail	1,161	2,323
Kettering	Machine Mart	Tools & Machinery Equipment	Comparison Retail	139	743
Kettering	MaxiSaver	Discount retailer	Comparison Retail	232	557
Kettering	Nolte Kitchen	Kitchen Retailer	Comparison Retail	93	232
Wellingborough	Aldi	Supermarket	Convenience Retail	1,672	2,044
Wellingborough	KFC	Fast Food Restaurant	Leisure	167	325
Wellingborough	Just for Pets	Pet Retailer	Comparison Retail	232	604
Wellingborough	Poundstretcher	Retail Value Store	Comparison Retail	557	2,787
Wellingborough	Savers	Discount Health & Beauty Retailer	Comparison Retail	186	325
Wellingborough	Travelodge (Midlands)	Hotel	Leisure	929	3,716
Rushden	Afrikana	African Inspired Restaurant	Leisure	186	279
Rushden	Aldi	Supermarket	Convenience Retail	1,672	2,044
Rushden	German Donor Kebab	Donor Kebabs, Sandwiches and Burger Restaurant	Leisure	121	232
Rushden	Lidl	Supermarket	Convenience Retail	1,672	2,415
Rushden	MaxiSaver	Discount retailer	Comparison Retail	232	557
Rushden	Pizza Hut Delivery	Pizza Delivery	Leisure	60	195
Rushden	Sense	Charity	Comparison Retail	111	557
Market Towns					
Desborough	Aldi	Supermarket	Convenience Retail	1,672	2,044
Desborough	Lidl	Supermarket	Convenience Retail	1,672	2,415

Burton Latimer	Aldi	Supermarket	Convenience Retail	1,672	2,044
Irthlingborough	Domino's Pizza	American Pizza Restaurant Chain	Leisure	88	139
Oundle	Toolstation	Tools & Building Supplier	Comparison Retail	255	557
Raunds	Aldi	Supermarket	Convenience Retail	1,672	2,044
Rothwell	Aldi	Supermarket	Convenience Retail	1,672	2,044
Rothwell	Lidl	Supermarket	Convenience Retail	1,672	2,415
Thrapston	Aldi	Supermarket	Convenience Retail	1,672	2,044

- 9.102 With regard to the existing viability and vitality of the town centres and whether they are vulnerable, the healthcheck findings in Section 4 make a range of conclusions with regard to the health of North Northamptonshire's principal centres. A frequent theme has been the impact of competition from Rushden Lakes on nearby centres, particularly on comparison retail provision.
- 9.103 We note that vacancy rates in the Market Towns average 11.6%, which is below the UK average of 13.8%. However, in practice, there is significant variation between centres, with the percentage of vacant units within each centre ranging from 1.8% in Thrapston and 20.8% in Irthlingborough.
- 9.104 As a consequence of market influences and the prevalence of small-scale units within them, we consider that the Market Towns across North Northamptonshire are particularly vulnerable to the loss of smaller units. In this context, our recommended impact threshold for retail and leisure proposals of relevance to the Market Towns is **100 sq.m.**
- 9.105 With regard to the Growth Towns, the vacancy rate averages 16.6% compared to a national average of 13.8%. We also note the potential for out of centre retail developments, particularly Rushden Lakes, to become even stronger in the future at the expense of these centres' vitality and viability. The existing out of centre commercial destinations all offer a range of comparison goods, which traditionally would have been sold from town centres. As such, the recommendation is reflective of the need to safeguard against the out of centre retail destinations becoming even stronger at the expense of the health of defined centres.
- 9.106 In this context, our initial recommendation is that the impact threshold of relevance to the Growth Towns is set at **280 sq.m** for both retail and leisure proposals. This threshold would effectively be the default to be applied authority-wide.
- 9.107 In terms of policy recommendations relating to the impact policy threshold, this relates to the defined centre, which for the purposes of retail development comprises the primary shopping area, and for all other main town centre uses comprises the town centre boundary.
- 9.108 It is important to emphasise that, whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the thresholds, national guidance states that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with planning Officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.
- 9.109 For the purpose of drafting future planning policy, it is important to qualify the area to which each local impact threshold will apply. We recommend that the thresholds would be applicable within 800 metres of the boundary of

the relevant centre. The distance of 800 metres is broadly commensurate with the potential walk-in catchments of smaller centres and is identified by Guidelines for Providing for Journeys on Foot (The Institution of Highways & Transportation, 2000) as being the 'preferred maximum' acceptable walking distance to a centre. We consider it to be appropriate for the higher threshold of 280 sq.m to apply authority- wide (i.e., beyond 800 metres of these centres), due to the lesser likelihood of significant adverse impacts arising from retail and leisure development.

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

- the proposal provides a gross floorspace in excess of 280 sq.m gross; or
- the proposal is located within 800 metres of a Growth Town Centre Boundary and is in excess of 280 sq.m gross; or
- the proposal is located within 800 metres of a Market Town Centre Boundary and is in excess of 100 sq.m gross.

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

9.112 The setting of a 'tiered' threshold is consistently accepted by Inspector's at Local Plan Examination and, in our view, acts to appropriately ensure that only those proposals which could genuinely result in an unacceptable impact are the subject of an impact assessment.

Hierarchy

9.113 Paragraph 90 of the NPPF identifies that local planning authorities should define a network and hierarchy of town centres. However, very little detail is provided in this regard and, notably, neither the NPPF nor the Town Centres PPG differentiates between different types of town centre and the role each serves.

9.114 The most recent definitions provided by the Government were provided by Planning Policy Statement 4: Planning for Sustainable Economic Growth ('PPS4'), which was published in December 2009 (and was superseded by publication of the original iteration of the NPPF in March 2012). Whilst PPS4 should be considered on this basis (i.e., it is not up to date practice guidance), in the absence of any other definitions, it is of some relevance to the consideration of a retail centres hierarchy.

9.115 Annex B of PPS4 identified that:

'City centres are the highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions. Planning for the future of such areas can be achieved successfully through the use of area action plans, with masterplans or development briefs for particular sites. In London the 'international' and 'metropolitan' centres identified in the Mayor's Spatial Development Strategy typically perform the role of city centres.

Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. In London the 'major' and many of the 'district' centres identified in the Mayor's Spatial Development Strategy typically perform the role of town centres.

District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.

Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.

Small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement.'

- 9.116 JCS Policy 11 sets out the network of centres in North Northamptonshire through the spatial strategy, and at Table 1 identifies Corby, Kettering, Wellingborough and Rushden as 'Growth Towns'. These are defined as being the focus for infrastructure investment and higher order facilities to support major employment, housing, retail and leisure development. The second position in the hierarchy is occupied by the eight 'Market Towns', which include Burton Latimer, Desborough, Higham Ferrers, Irthlingborough, Oundle, Raunds, Rothwell and Thrapston. The focus of the 'Market Towns' will be to provide a strong service role for their local communities and surrounding rural areas with growth in homes and jobs to support regeneration and local services, at a scale appropriate to the character and infrastructure of the town.
- 9.117 Having visited all of the principal centres, and analysed the market shares deriving from the household telephone survey findings in detail, we are satisfied that each of these centres continues to perform a role and function commensurate with their position in the two-tier retail hierarchy and do not recommend any changes in respect of these centres' positions.

Development Management Policies

- 9.118 The adopted Joint Core Strategy development plan promotes a 'town centre first' policy approach which is broadly consistent with the general requirements of paragraphs 90 to 95 of the NPPF).
- 9.119 It is evident that fundamental changes in the retail sector – largely resulting from the shift to online retail, which has been accelerated by the Covid-19 pandemic – have had a permanent impact on land use on the high street. As such it is critical that defined centres continue to diversify in order to provide (where possible) access to jobs, leisure, culture, services, open space and social connection.
- 9.120 The Study identifies that the proportion of vacant floorspace in some centres is either in excess of, or approaching, the national average, and that there is a clear need to direct additional main town centre uses to these centres in particular. Whilst the majority of these centres are considered to be reasonably healthy, there will be a clear benefit in reducing the level of vacancies to improve centres' offer and visual attractiveness, and to support additional activity. Accordingly, it will be important to accommodate additional development within centres (or, failing that, in sustainable locations which are able to support linked trips to defined town centres).
- 9.121 In this regard, we note that paragraph 017 of the Town Centres PPG indicates that proposals for edge and out of centre retail and leisure developments should be considered with reference to the health of centres that would be impacted by development. Paragraph 017 states that:

'A judgement as to whether the likely adverse impacts are significant can only be reached in light of local circumstances. For example, in areas where there are high levels of vacancy and limited retailer demand, even very modest trade diversion from a new development may lead to a significant adverse impact.'

- 9.122 In the context of the current vacancy rates in the principal centres and national planning policy requirements, we recommend that emerging plan policies are sufficiently flexible so as to allow for an appropriate range of town centre uses beyond retail, and reflect the need to repurpose historic, sometimes outdated retail stock in order to

accommodate new residential, leisure and community uses. To this end, we note that paragraph 90 of the NPPF states that planning policies should:

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

- 9.123 On this basis, it will be important for the emerging plan to clearly set out the importance of the sequential and impact tests and explain the local circumstances which frame how they will be applied in practice. The sequential and impact tests will need to be applied in a robust manner so as to reduce the vacancy rate across the principal centres (and in other defined centres) and support centres that are fit for purpose going forward. Whilst non-retail uses will be an important component of the mix of land uses in principal centres moving forward, there is still a requirement to accommodate new retailers and additional retail floorspace within defined centres wherever possible.
- 9.124 The emerging development plan should also consider the effects of the expanded Use Class E, and the unintended consequences of providing additional flexibility across Class E outside of town centres. Therefore, the Council may wish to consider applying restrictive conditions to certain forms of development in order to limit the authorised use to that which has been justified in the application submission. This will help to ensure that unacceptable impacts do not arise from future Class E development.

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