

Rutland Retail, Leisure & Town Centres Study (2023 Full Update) — Volume 1: Main Report

Firstplan for Rutland County Council Final Report October 2023

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Section 1

Introduction & report structure

- 1.1 Firstplan have been instructed by **Rutland County Council** ('RCC', 'the Council') to provide advice on the future retail and commercial leisure needs for the County, and an updated assessment of the performance of its two principle town centres of Oakham and Uppingham. **This Retail, Leisure and Town Centres Study** ('the study') will form part of the evidence base of the Council's new Local Plan, which is at initial stages of preparation and which will, upon adoption, guide development in the County over at least the next 15 years.
- 1.2 Specifically, the study will update the findings of the Council's existing retail and town centres evidence base study, the Rutland Retail Capacity Assessment (2016 Update) ('the 2016 Study') which was prepared by GVA (as was) and published in April 2016. This study seeks to update the findings of the 2016 study in full, including being supported by new empirical evidence.
- 1.3 The study focusses on the quantitative 'need' for new retail floorspace in the County over the period to 2041, together with an assessment of spending growth and the qualitative 'need' for new commercial leisure floorspace and, as noted above, an analysis of the current performance of the town centres of Oakham and Uppingham. As well as capturing the future retail and commercial needs which the Council will need to plan for, this study also has regard to the significant changes which have come about since — or have been significantly heightened by — the Covid-19 pandemic. These changes have had the potential to influence the quantum of retail needs which the Council may be required to plan for. For example, the Covid-19 pandemic brought about a significant upturn in online shopping (which was already increasing prior to the Covid-19 pandemic), but has also changed how people live and work, with potential opportunities for local high streets and town centres arising from increased levels of homeworking in some locations.
- 1.4 At the local level, whilst there have been no major new retail or commercial leisure developments within either Oakham or Uppingham town centres since the 2016 Study, Oakham has been the subject of considerable interest from foodstore operators and new Aldi and Lidl stores have commenced trading in the town, which can be expected to have an impact on how residents of the County undertake their food shopping. These changes will be fully captured by this study. Surrounding the County, Leicester, Peterborough, Corby and Stamford have historically provide competition for spending, particularly in respect of non-food ('comparison') goods, and commercial leisure and this continues to remain the case.
- 1.5 In order to accurately capture the impact of the above changes and gain a clear understanding of where residents of Rutland and its surrounding catchment are visiting for their shopping and leisure trips, a new household telephone survey has been undertaken in support of the study. The survey captures patterns of shopping for comparison goods, convenience (food) goods, different types of commercial leisure activity (such as dining out, visiting cinemas, entertainment venues and so on), as well as identifying how residents use the town centres in the County. The new survey also captures the amount of local residents' spend which is spent online, and how their shopping patterns have changed both as a consequence of the Covid-19 pandemic. The survey was developed in collaboration with the Council and undertaken by a specialist market research consultancy, NEMS Market Research.
- 1.6 In addition to the matters set out above, the study also seeks to integrate and sense check the findings of a separate evidence base report ('Oakham and Uppingham Town Centres – Local Plan Retail Policy

Advice (June 2021)) which was undertaken by Firstplan on behalf of the Council ('the 2021 Study'), as part of the overall development of strategic recommendations in the study.

- 1.7 The 2021 Study provided retail policy advice to the Council in respect of recent changes which have taken place in terms of planning legislation associated with the introduction of Use Class E, changes to permitted development rights, and undertook a review of defined Primary Shopping Areas in Oakham and Uppingham town centres. The report also provided a sense check review of the robustness of the retail and town centre policies in the Council's adopted Local Plan in light of the review of the aforementioned matters.
- 1.8 The integration of the findings of the 2021 Study within the strategic recommendations of this report provides the Council with a single evidence base point of reference for key recommendations in respect of retail and main town centre uses to inform the preparation of the Council's new Local Plan. However, it is important to note that in this study we only extract the key recommendations from the 2021 Study and it is important for interested parties to consider the findings of both documents alongside one another.
- 1.9 Our report is structured as follows:
- **Section 2** sets out the policy and legislative context within which the study has been prepared.
 - **Section 3** provides an assessment of the market context within which the study has been prepared (updating the equivalent analysis which was undertaken in the 2021 Study).
 - **Section 4** provides a brief overview of key changes which have taken place in the network of centres surrounding Rutland since the 2016 Study, which is an important consideration as many residents in the County look towards these destinations for an element of their shopping and leisure visits.
 - **Section 5** provides an assessment of the vitality and viability of Oakham town centre, and **Section 6** provides an equivalent assessment for Uppingham town centre.
 - **Section 7** provides an overview of the new household telephone survey which has been undertaken in support of this study – the survey area used and the approach undertaken by the survey in asking respondents' patterns of shopping and leisure visits.
 - **Section 8** presents an assessment of the quantitative need for comparison goods floorspace which the Council will need to plan for over its new Local Plan period, and Section 9 repeats this exercise for convenience goods floorspace.
 - **Section 10** sets out an assessment of commercial leisure provision and the growth in commercial leisure spending which is expected to come forward over the new Local Plan period.
 - Informed by the findings of the previous sections of the report, **Section 11** sets out strategic recommendations for the Council to consider taking forward in the preparation of its new Local Plan.
 - **Section 12** sets out conclusions.

1.10 Our report is supported by the following appendices:

- **Appendix 1** – Comparison goods retail need tabulations
- **Appendix 2** – Convenience goods retail need tabulations
- **Appendix 3** – Leisure spend tabulations
- **Appendix 4** – Overview of household telephone survey questions
- **Appendix 5** – Strategic recommendations – comparative analysis with 2016 Study recommendations.

- 2.1 In this section we summarise the key features of national and local planning policy guidance which provides the context and framework under which this study has been prepared.

NATIONAL POLICY CONTEXT

National Planning Policy Framework (NPPF, as revised 2023)

- 2.2 The most up-to-date iteration of the National Planning Policy Framework (NPPF) was published on 5th September 2023 and sets out the Government's planning policies for England and how these should be applied (paragraph 1). The NPPF must be taken into account in preparing the development plan, and is a material consideration in planning decisions (paragraph 2). At the heart of the Framework is a presumption in favour of sustainable development (paragraph 10). The NPPF is a material consideration in planning decisions.
- 2.3 The NPPF is clear that Local Plans, incorporating neighbourhood plans where relevant, are the starting point for the determination of any planning application (paragraph 12). Thus, in terms of decision-making, applications for planning permission must be determined in accordance with the development plan unless material considerations indicate otherwise (paragraph 47).
- 2.4 LPAs should ensure that the preparation and review of all policies is underpinned by relevant and up-to-date evidence. This should be adequate and proportionate, focused tightly on supporting and justifying the policies concerned, and consider relevant market signals. (paragraph 31). Local plans and spatial development strategies are examined by an independent planning inspector to assess whether they have been prepared in accordance with legal and procedural requirements, and whether they are sound. Plans are 'sound' if they are (paragraph 35):
- a) **Positively prepared** – providing a strategy which, as a minimum, seeks to meet the area's objectively assessed needs; and is informed by agreements with other authorities, so that unmet need from neighbouring areas is accommodated where it is practical to do so and is consistent with achieving sustainable development;
 - b) **Justified** – an appropriate strategy, taking into account the reasonable alternatives, and based on proportionate evidence;
 - c) **Effective** – deliverable over the plan period, and based on effective joint working on cross-boundary strategic matters that have been dealt with rather than deferred, as evidenced by the statement of common ground; and
 - d) **Consistent with national policy** – enabling the delivery of sustainable development in accordance with the policies in this Framework and other statements of national planning policy, where relevant.

- 2.5 The NPPF further advocates a ‘town centres first’ approach and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. In planning for town centres LPAs should (paragraph 86):
- a) 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;
 - b) 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;
 - c) retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
 - d) 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;
 - e) 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
 - f) recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.
- 2.6 The NPPF requires local planning authorities to apply a sequential test to planning applications for main town centre uses which are neither in an existing centre nor in accordance with an up-to-date plan. Paragraph 87 explains that main town centre uses should be located in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered.
- 2.7 The NPPF also requires applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date plan, to prepare an impact assessment. Local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold. This should include assessment of the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment. Rutland has, since the adoption of the Core Strategy in 2011, had a locally-set impact assessment threshold of 500 sq.m in place for retail proposals outside of defined town centres.

Proposed changes to the NPPF

- 2.8 In January 2023, the Government undertook consultation on the proposed Levelling-up and Regeneration Bill, setting out how the Government intends to reform national planning policy over

the medium to longer-term, but also proposing a number of more immediate changes to the National Planning Policy Framework (NPPF). The proposed reforms to national planning policy predominantly concern housing, namely the five-year land supply and the significance of local strategic planning in setting housing targets. Further changes proposed relate to the life-extension of existing renewable sites, notably to promote onshore wind development, and to give policy protection to agricultural land for food production. No changes are proposed at the time of preparation of this study to the NPPF's approach in respect of the 'town centres first' approach or the requirement for the application of the sequential and retail impact policy tests for developments which are outside defined 'town centre' locations.

Planning Policy Guidance (PPG) 'Town Centres & Retail' (2014 and updated)

- 2.9 In March 2014 the then Department for Communities and Local Government (DCLG) launched the online planning practice guidance, which cancelled a number of previous planning practice guidance documents, including the Practice Guidance on Need, Impact and the Sequential Approach (2009). The document is a 'live' web-based resource that is updated as necessary, and indeed most of the guidance was subject to a comprehensive update in 2019.
- 2.10 Although it does not constitute a statement of Government policy, it provides technical guidance on how to prepare a robust evidence base, how to monitor the vitality and viability of town centres, and how to assess the impact of proposals for main town centre uses which fall outside of town centres. The web-based resource also provides guidance on how to assess and plan to meet the needs of main town centre uses in full through production of a positive vision or strategy for town centres.
- 2.11 The PPG identifies that the following indicators, and their changes over time, may be relevant in assessing the health of town centres, and planning for their future. The range of indicators used for assessing town centre vitality and viability was broadened following an update to this section of the PPG in 2019¹ to include factors such as opening hours, and evidence of whether there are considered to be any identifiable barriers in place which may prevent the expansion of existing businesses/ opening of new ones.
- a) diversity of uses;
 - b) proportion of vacant street level property;
 - c) commercial yields on non-domestic property;
 - d) customers' experience and behaviour;
 - e) retailer representation and intentions to change representation;
 - f) commercial rents;
 - g) pedestrian flows;
 - h) accessibility – this includes transport accessibility and accessibility for people with different impairments or health conditions, as well as older people with mobility requirements;
 - i) perception of safety and occurrence of crime;
 - j) state of town centre environmental quality;
 - k) balance between independent and multiple stores;
 - l) extent to which there is evidence of barriers to new businesses opening and existing businesses expanding; and
 - m) opening hours/availability/extent to which there is an evening and night time economy offer.

¹ Paragraph 006 of PPG Town Centres & Retail (revised 22/07/19). Reference 2b-006-20190722

DEVELOPMENT PLAN

- 2.12 At the local level, there has been no change to the development plan position since the 2016 Study was published, with the Rutland Core Strategy (adopted 2011) and the Site Allocations and Policies DPD (adopted 2014) together forming the development plan for the County. The new Local Plan will, once adopted, replace the contents of these two documents in full.
- 2.13 Prior to the commencement of work on the current emerging Local Plan, the Council was previously at an advanced stage of preparation of a new Local Plan, the 'Rutland Local Plan 2018-2036', which had been submitted to the Secretary of State for Examination. However, this submission Local Plan was formally withdrawn by the Council in February 2020. The reasons for withdrawal of the Local Plan were related to viability consideration in relation to proposals set out in the submission Local Plan for development at the site of St George's Barracks, near the village of Edith Weston.
- 2.14 Given the development plan position remains the same as at the time of previous retail & town centre evidence base studies, we do not seek to discuss these in detail, but provide a salient overview below to assist with context.

Rutland Core Strategy (2011)

- 2.15 Policy CS17 ('Town Centres and Retailing') of the Core Strategy sets out a hierarchy of centres identifying Oakham as the 'main town centre' serving the whole of Rutland, and Uppingham as a 'town centre', serving the surrounding rural catchment. Policy CS17 directs 'main town centre uses' to these defined centres, and where developments cannot be accommodated within defined town centres a sequential approach will be followed.
- 2.16 The Core Strategy sets out the amount of comparison and convenience goods floorspace which should be accommodated in Rutland over the course of the Core Strategy period, with the figures identified based on the findings of the previous version of the Council's retail needs assessment which dated from 2011 (meaning they are therefore significantly out of date). The Core Strategy also identifies initiatives for the regeneration of the West End area in Oakham town centre over the course of the Plan period.
- 2.17 The Core Strategy also makes provision for a reassessment of the areas defined as primary and secondary shopping frontages, which was subsequently undertaken as part of the Site Allocations and Policies Development Plan Document.

Rutland Site Allocations and Policies (2014)

- 2.18 The Site Allocations and Policies DPD was adopted by the Council in October 2014, and allocates sites for development and sets out policies for determining planning applications. The DPD reflects the approach of the Core Strategy in directing additional retail floorspace to Oakham, and provides a revised set of retail capacity forecasts to reflect the publication of more up to date evidence in respect of quantitative retail need.
- 2.19 Policy SP3 of the Site Allocations and Policies DPD allocates two sites in Oakham for retail development: Site R1 – Tim Norton site, Long Row (0.69ha) and Site R2 – Land to the rear of the White Lion, Melton Road (0.29ha). Site R2 is located within the boundary of Oakham town centre, whilst Site R1 is located on the edge of the town centre. Neither of these allocations have subsequently come forward for development. Policy SP3 states both sites are only suitable for

comparison goods retail development (with other appropriate town centre uses or residential uses on upper floors). Policy SP3 also states that where a site incorporates existing 'public services' such as a car park, proposals will be expected to include 'appropriate arrangements' for the replacement or reconfiguration of this. Policy SP3 also states that applications for retail development on unallocated sites will need to demonstrate compliance with the sequential test, in line with Core Strategy policy CS17.

- 2.20 The Site Allocations and Policies DPD, as noted above, also considered revisions to the defined town centre boundary and primary and secondary shopping frontages in Oakham and Uppingham town centres. The most significant change proposed by the DPD in this respect was the extension of the boundary of Oakham town centre to include the Tesco store on the western side of the town centre on South Street, as well as Gaol Street, which acts as the main pedestrian link between the Tesco store and the primary shopping area. The boundary was also extended to include an area of land to the south and east of the Tesco store, which at time of preparation of the DPD was expected to come forward as an extension to the Tesco store, for which planning permission has been granted; the permission was ultimately not implemented by Tesco and is understood to have now lapsed.
- 2.21 Policy SP12 of the Site Allocations and Policies DPD sets out what types of uses are permissible in the areas of Oakham and Uppingham town centre defined as primary and secondary shopping frontage.

EMERGING POLICY

Withdrawn Local Plan (2021)

- 2.22 Following the adoption of the Core Strategy, RCC commenced work on a new Local Plan for the County. This was subject to statutory consultation and subsequently approved by Councillors in February 2020, before being submitted for Examination in February 2021. However, the new Local Plan was subsequently withdrawn in September 2021 as the result of Councillors confirming that they were not willing to accept a Housing Infrastructure Fund grant from Homes England, which would be used to take forward the residential-led redevelopment of the former St George's military barracks at North Luffenham. The new Local Plan had intended this to come forward as a 'Garden Community', however without the Homes England funding the proposed allocation was no longer viable, which in turn undermined the viability and soundness of the wider Local Plan, leading to its withdrawal.

New Local Plan (2022-)

- 2.23 Since the previous new Local Plan was withdrawn, development of a new emerging plan for Rutland County Council commenced in February 2022 with a call for sites, in which 149 sites were submitted to the council. The first stage of the public consultation consisted of the Issues and Options Consultation that was held between May and June 2022, in which key issues were established to form the basis of for a new local plan for Rutland. As set out in the Issues and Options Consultation Document (2022), a range issues were identified; of relevance in the context of this study is Issue 5 'Supporting vibrant town centres and a network of local centres', which is discussed in further detail below.

- 2.24 It is proposed the new Local Plan will cover the period 2021-41, and accordingly this study seeks to project retail and commercial leisure needs over the period to 2041 in order to demonstrate consistency with the emerging Plan.
- 2.25 The Issues and Options consultation sets out that, regarding retail and town centre development, the NPPF includes a set of principles, including a ‘town centre first’ principle which recognises centres as being at the heart of communities. In order to protect the vibrancy of centre locations, the NPPF stipulates that retail and other town centre uses should be directed town centres. In regard to developments of such uses outside of the defined town centres, sequential and impact tests are required to demonstrate that there are no sequentially preferable sites available or that proposed development would have an adverse impact upon existing centres. We have provided a summary of the requirements of the NPPF in this respect in full above².
- 2.26 As previously identified, Rutland contains two defined town centres; Oakham and Uppingham where main town centres uses are deemed acceptable including restaurants, drinking establishments and tourist facilities. The withdrawn Local Plan defined Primary Shopping Frontages for the two centres, which is no longer a requirement under the NPPF (as revised, 2021), although the accompanying PPG sets out that authorities can retain them if there is a robust case for doing so³.
- 2.27 The Issues and Options consultation confirms that the NPPF sets out a threshold of 2,500 sq.m gross for developments which require an impact assessment. However, Local Plans can set out a lower threshold where deemed appropriate, with the adopted Core Strategy utilising a lower threshold of 500 sq.m (gross) for town centre uses outside of the defined town centres. This requires proposals above the threshold to undertake an Impact Assessment which allows the Council to consider the impacts of larger developments on the town centres.
- 2.28 Rutland County Council’s previous approach focused on retaining existing main town centre uses for purpose of maintain the vibrancy of the town centre. Whilst this approach is still deemed necessary, updated planning legislation, specifically the new Class E use class provides greater flexibility for establishments operating under E use classes to change use without permission. As a consequence, the council now has lost some of the previous controls to retain retail shops.
- 2.29 Additional updates to planning policy in August 2021 enabled premises falling within Class E to be changed to residential without planning permission. An important caveat is that prior approval is needed for a site or change of use over 1,500 sqm of floorspace, enabling the council to potentially insert a new policy that will strongly resist change of use or redevelopment proposals of 1,500 sqm where it would affect the vibrancy of its town centres.
- 2.30 The Issues and Options consultation confirms that the Council will need to update the Retail Capacity Assessment (2016) to consider whether there is a need to provide any retail allocations and whether the town centre strategy for Oakham and Uppingham remains up to date, and this report responds to this requirement and will update the findings of the 2016 Retail Capacity Assessment in full. It also notes that further work may be required to update the Oakham and Uppingham Town Centres – Local Plan Retail Policy Advice Report (2021) to assess the impact of Covid-19 on Oakham and Uppingham in the long term to consider how Rutland’s town centres will develop over the plan period. Again, this study seeks to act as an update to the 2021 Study, but it

² See paragraphs 2.6 & 2.7

³ It should be noted that there is an error in the text of para 3.7.4 of the Issues and Options consultation, which states that there is no longer a requirement under the NPPF for local plans to identify Primary Shopping Areas; in fact there is no longer a requirement to demonstrate Primary Shopping Frontages, however the Town Centres and Retail PPG notes that these can be retained if desired.

remains the case that future policy and/or legislative changes may necessitate further updates/revisions to the findings and recommendations which this study sets out.

- 2.31 In accordance with the latest Local Development Scheme (January 2023), below is the timetable for the remaining key milestones pertaining to the development of the new Local Plan.

Local Plan Stage	Timetable
Preferred Options	Autumn 2023
Preparation of proposed submission plan (Regulation 19)	Autumn 2024
Submission to Secretary of State (Regulation 22)	January 2025
Independent examination (Regulation 24)	To be advised
Adoption and publication	To be advised

Source: RCC website (March 2023)

NEIGHBOURHOOD PLANNING

- 2.32 The Council has a number of 'made' Neighbourhood Plans in place, which seek to guide development at the local level. Neighbourhood Plans are community-led, with support given from RCC on legislative and procedural aspects. The schedule of Neighbourhood Plans which are 'made' or under preparation in the County is as follows:

- Barrowden and Wakerley - 'made' August 2019
- Cottesmore - 'made' May 2016
- Edith Weston - under review
- Greetham - 'made' October 2017
- Ketton & Tinwell - at referendum stage
- Langham - 'made' April 2016
- Market Overton - 'made' February 2023
- North Luffenham - at examination
- Oakham & Barleythorpe - 'made' June 2022
- Uppingham - 'made' January 2016 and currently under review
- Whissendine - at consultation stage
- Wing - at consultation stage

- 2.33 The Neighbourhood Plans for Oakham & Barleythorpe and Uppingham each set out policies in respect of the respective town centres, supporting vitality and viability and identifying the appropriateness of individual uses within different parts of the centre.

CHANGES TO PLANNING LEGISLATION

- 2.34 In this section we provide a brief review of key legislative changes which have come into force in the past two years, specifically in respect of changes to the Use Classes Order, and changes to permitted development rights for town centres.

Changes to the Use Classes Order

- 2.35 On 1st September 2020 the Government introduced a number of significant changes to the Use Classes Order 1987 (as amended), which have implications for local planning authorities in planning for their town centres. An overview of these is set out below.

Use Class E

- 2.36 The most significant change put forward in the September 2020 legislation was the introduction of a new Use Class E. The change combines all former Use Classes of A1 (shops), A2 (financial and professional), A3 (restaurants and cafes), class B1 (offices), together with parts of class D1 (non-residential institutions) and class D2 (assembly and leisure) into a single Use Class E 'Commercial, Business and Service'. The extent of operations covered under Use Class E are shown in Figure 2.2. The intention of the introduction of class E is to allow a greater degree of flexibility in the range of uses which can be accommodated in town centres in light of wider changes in shopping patterns and consumer behaviour (discussed further in **Section 3** of this report).

Figure 2.2 Use Class E

In 11 parts, Class E more broadly covers uses previously defined in the revoked Classes A1/2/3, B1, D1(a-b) and 'indoor sport' from D2(e):

- **E(a)** Display or retail sale of goods, other than hot food
- **E(b)** Sale of food and drink for consumption (mostly) on the premises
- **E(c)** Provision of:
 - **E(c)(i)** Financial services,
 - **E(c)(ii)** Professional services (other than health or medical services), or
 - **E(c)(iii)** Other appropriate services in a commercial, business or service locality
- **E(d)** Indoor sport, recreation or fitness (not involving motorised vehicles or firearms or use as a swimming pool or skating rink,)
- **E(e)** Provision of medical or health services (except the use of premises attached to the residence of the consultant or practitioner)
- **E(f)** Creche, day nursery or day centre (not including a residential use)
- **E(g)** Uses which can be carried out in a residential area without detriment to its amenity:
 - **E(g)(i)** Offices to carry out any operational or administrative functions,
 - **E(g)(ii)** Research and development of products or processes
 - **E(g)(iii)** Industrial processes

Source: Planning Portal

- 2.37 As Figure 2.2 shows, Use Class E extends beyond traditional commercial activities to also include medical and health services and creche/nursery facilities. It also incorporates a wide range of leisure uses ('indoor sport, recreation or fitness') and business uses, with part (g) of Class E effectively replacing Class B1(a) to (c).
- 2.38 It is important to note that Use Class E does not directly correspond to the definition of 'main town centre uses' as defined by the NPPF. Of particular note is that former Use Classes A4 (drinking establishments) and A5 (hot food takeaways), which are considered by the NPPF as 'main town centre uses', are not included within Use Class E and instead fall within Sui Generis.

2.39 The introduction of Use Class E thus provides greater flexibility, allowing seamless change between any of the different components (a) to (g) within Use Class E without the need for planning permission, as movement from one primary use to another would not constitute 'development'. It also allows different types of Class E use to be accommodated within a single unit without requiring planning permission; meaning that, for example, a retail unit or a yoga studio can introduce a customer café without a requirement for planning permission for change of use.

2.40 It is important to note that Use Class E is not specifically related to town centres, but covers any site currently in operation in one or more of the above uses; in other words, an out of centre supermarket, retail warehouse unit or restaurant would also be considered as a Class E use and would be afforded the same level of flexibility in changing between different components of the use class, unless planning conditions are in place to restrict the range of goods which can be sold.

Use Class F

2.41 A series of more protected 'community uses' were moved into a new Class F 'Local Community and Learning' use class. Class F.1 includes schools, galleries, museums, halls, libraries and places of worship. Class F.2 includes 'essential isolated shops', as well as community halls, outdoor sports facilities and swimming pools/skating rinks.

Sui Generis Uses

2.42 The former A4 Drinking establishments and A5 Hot food takeaway use classes have been removed and will be considered 'Sui Generis' uses, as will cinemas, concert, dance, and bingo halls which fell within the former D2 use class. This will mean that changes to and from these uses will be subject to full local consideration through the planning application process.

Permitted Development Rights

2.43 Following consultation in December 2020, the Government confirmed on 31st March 2021 that a new permitted development (PD) right to allow the change of use in England from any use, or mix of uses, from the Commercial, Business and Service use class (Class E) to residential use (Class C3) will be introduced under Class MA of the Town and Country Planning (General Permitted Development etc.) (England) Order 2021.

2.44 The new PD rights subsequently came into effect on 1st August 2021 and allow unused commercial buildings to be granted permission for residential use via a fast-track prior approval process. Councils will only be able to assess prior approval applications on specific considerations including flooding, noise from commercial premises and adequate light to habitable rooms. Other site-specific issues that Councils can take into consideration include: the impact of the loss of a health service and in conservation areas the impact of the loss of a ground floor Class E use. The PD rights will apply in Conservation Area but not on other protected land designated as Article 2(3) such as Listed Buildings, National Parks, or Areas of Outstanding Natural Beauty.

2.45 The PD rights include a vacancy requirement that will ensure the building changing use has been vacant for three months before the date of the application to protect successful businesses in existing use. The building must also have been in a commercial, business, or service use for at least two continuous years previously. A size limit of 1,500 square metres of floorspace also applies, to avoid the loss of larger units such as anchor/ department stores, although these

considerations will be less applicable in Rutland's town centres where the majority of the floorspace stock is below this size. .

- 2.46 The PD rights apply to all uses within Class E. As set out above, Class E covers a range of uses including retail, restaurants, professional services, offices, gyms, surgeries, nurseries, and a host of other high street uses. This could greatly expand the range of premises granted a right to convert to residential, as compared with the existing limited office to residential PD rights.

OTHER EVIDENCE BASE & RELEVANT DOCUMENTS

'Much In Little' — Rutland Economic Strategy (July 2023)

- 2.47 RCC have recently finalised an Economic Strategy for the County which sets out the Council's approach towards securing a successful future for Rutland's economy. The strategy offers both early and long term actions and objectives, with the intention being that these will be supplemented through additional commitments and actions to be developed with partners over coming months.

- 2.48 The Economic Strategy has been developed with the following vision for the County:

"we will harness the characteristics of the county to build the modern rural economy, with a productive, sustainable, and diverse business base. This is a prosperous county. People are attracted here to work, live and visit, drawn by the great quality of life, higher value jobs and excellent connectivity."

- 2.49 To achieve this vision, the Council have identified four objectives which are the basis of the strategy:

- New technologies and market industries
- Productive local businesses
- Skilled workers in quality local jobs
- Thriving places and communities.

- 2.50 Under each objective we have defined a number of priorities and a set of outcomes that we will pursue as part of delivering our economic vision. The final of these objectives, 'thriving places and communities', is of particular importance as it contains measures in respect of the performance of the County's town centres. Specifically, the objective seeks to, inter alia, "support vibrant town and local centres", with a key related outcome being to "increase town centre footfall, business density and consumer satisfaction with amenities."

Discover Rutland Tourism Strategy 2020-25

- 2.51 This report by RCC and Discover Rutland highlights the significance of the visitor economy to Rutland. It notes that "

"Rutland's visitor economy has continued to thrive in recent years. Growth in economic impact, sector employment and visitor numbers have seen continued steady growth, with 2018 STEAM data showing the value of tourism in Rutland being £135.6 million (up 9.5%

on 2017), supporting 1,754 full time equivalent jobs (up 6% on 2017) and visitor numbers rise to 1.89 million (up 2.1% on 2017)."

- 2.52 Notwithstanding this performance, the Strategy notes that many events in Rutland continue to predominantly attract visitors from the local area, and the Strategy recommends shifting towards investing in more national, and ultimately global, exposure. The Strategy also notes that "In order to attract visitors to the county, there need to be things to entice them, such as quality accommodation, attractions, place to eat and things to do." Although the Strategy does not seek to directly enhance linkages with the County's town centres, as these locations contain the broadest range of assets in respect of these matters, there is inherently scope for the County's town centres to support this tourism role.

Rutland Employment Needs & Economic Development Evidence (August 2023)

- 2.53 RCC have commissioned Iceni to undertake a study of the need for employment land in the County. In common with this study, this will form part of the evidence base of the Council's new Local Plan. The study assesses the need for additional employment provision in the County over the Local Plan period and considers sites which could potentially accommodate these needs, although the majority of these sites are not located within town centres.
- 2.54 In terms of broader economic development evidence, the study draws attention to the significance of the visitor economy to the County, and highlights the need to support sustainable tourism and to "plan for appropriate local infrastructure for the visitor economy (linking to Oakham and Uppingham town centres in particular, but also recognising the significance of heritage attractions)".
- 2.55 The study also notes the significance of retail to the County's economy; at 11.6% it is the third largest employer behind education (12.2%) and public admin and defence (12%).

Section 3 Market context

- 3.1 In this section we set out a review of the context within which the findings of this study are being prepared, discussing the market and economic trends which affect retail and leisure spending growth and consumer demand.
- 3.2 It should be noted from the outset that the analysis set out in this section is a 'snapshot' of the economic and market conditions which are prevalent at the time of preparation of this study (September 2023). Retail and town centres can rapidly evolve, whilst economic circumstances at the time of preparation of this study are in a somewhat volatile and fluctuating position, with high levels of inflation and associated cost of living concerns likely to impact on consumer confidence in the short to medium term, in turn impacting on footfall and spend in town centres.
- 3.3 To inform our analysis, we draw reference to a number of up to date published third party evidence reports from organisations such as ONS, Springboard and Experian, whose Retail Planner Briefing Notes provide insight on consumer spending forecasts over the short, medium and long term. We also draw on the findings of the household telephone survey which has been undertaken in support of this study, which asked questions on patterns of online shopping usage across the County (and wider study area), and the extent to which these have altered as a consequence of the Covid-19 pandemic. Further details of the household telephone survey are set out in **Section 7** of this report.
- 3.4 The most recent Retail Planner Briefing Note ('RPBN') published by Experian was RPBN 20, published in February 2023, which is referred to as 'RP20' in the analysis below and in the remainder of this report.

SECTORAL CHANGES SINCE THE 2016 STUDY

- 3.5 The retail and leisure sector is dynamic and fast-moving, and heavily influenced by external economic factors, particularly prevailing economic conditions which can cause consumers to limit spending and developers and retailers to be more cautious in taking space. There have been a number of significant changes in the sector since the 2016 which seek to briefly summarise below. The impact of Covid-19 on shopping patterns is also clearly a significant consideration and is considered by way of separate analysis later in this section.

The convenience sector

- 3.6 In the convenience sector, the main trend in recent years has been the continued rise in popularity of the discount retail sector, headed by Aldi and Lidl. The success of these stores has increased significantly over the course of the last decade, with their popularity initially having been boosted during the 2008 financial crisis, but has become particularly amplified in recent years as both companies step up store expansion programmes and claim greater levels of 'market share' at a time when much of the population is becoming increasingly cost-conscious and switching to the use of these stores for at least an element of their shopping. Since the publication of the 2016 Study, both Aldi and Lidl have commenced trading on the outskirts of Oakham, whilst Aldi also have a published operator requirement for a new foodstore to serve Uppingham.

- 3.7 Significantly, Aldi has recently overtaken Morrisons to be the UK's fourth largest supermarket in terms of market share, a significant moment given it has broken the long-standing 'big four' dominance of Tesco, Asda, Sainsbury's and Morrisons. Lidl and Aldi combined now have over 16% of the market share in the grocery sector. In addition to securing additional sites for new stores, both companies are also in some cases seeking to enlarge or redevelop existing facilities to provide larger sales area to accommodate the additional numbers of customers which their stores now attract.
- 3.8 Elsewhere within the sector, the traditional 'big four' retailers are not expanding their physical store estates to any significant extent, although do continue to open new stores where opportunities present themselves, for example aligned to residential urban extensions with new district centres, or major city centre regeneration schemes. Newer stores tend to be smaller in scale than those which were being constructed up until the late 2000s. Sainsbury's, for example, are trialling a new format of store called a 'Neighbourhood Hub', which sits between its larger superstores and small convenience stores in terms of size and have recently opened one of these stores in Desborough, Northamptonshire.
- 3.9 For the most part however, these retailers are focussing on improving the efficiency and offer of their existing stores, introducing enhanced in-store food/dining options (for example, Sainsbury's is continuing to roll out in-store Starbucks concessions, and a number of Greggs outlets have opened inside Tesco stores), and/or expanding their non-food offer; for example Waitrose have introduced a limited range of John Lewis products into a number of their stores. Stores have also sought to increase facilities for online delivery and click & collect, in response to increased demand for this during and after the Covid-19 pandemic.

The comparison sector

- 3.10 In terms of comparison goods shopping, the changes affecting town centres have arguably been more pronounced in the past five years than at any time previously. The loss of BHS department stores from town centres at the end of 2016 has been followed by the closure of Debenhams stores, following the company entering administration in both April 2019 and April 2020 and undergoing a number of rounds of store closures between 2018 and the closure of the final round of 118 stores in May 2021. The Arcadia Group, which owned long-established high street retailers such as Topshop, Topman, Dorothy Perkins, Evans and Burton, entered administration in November, with the brands sold to online-only operators such as ASOS and Boohoo Group. This meant that Arcadia's entire portfolio of high street stores were closed. At the time of preparation of this study, the household goods store Wilko (which has a branch in Oakham town centre) entered administration, with the majority of its store estate likely to cease operations. Closures of Wilko stores will leave voids of large retail units in town centres of varying sizes, but in particularly market towns and smaller town and district centre where Wilko stores often performed a significant 'anchor' role.
- 3.11 Other retailers such as House of Fraser and, to a lesser extent John Lewis, have also reduced their physical store estate, with John Lewis' store in Peterborough city centre being closed as part of a recent review of the company's store estate. The company's store in Highcross, Leicester continues to trade. Marks & Spencer are continuing with a programme to reprofile their store estate, which has in some cases meant moving out of older units in town and city centres where their stores are less able to trade profitably. In some cases the store has replaced this representation with an out-of-town offer, usually focusing primarily on food sales.

- 3.12 Whilst many comparison goods retailers have been downsizing their store portfolios for a number of years, as online shopping has meant there is less of a need for an extensive network of physical retail stores, the closure/downsizing of the operators mentioned in the paragraph above has arguably had the most 'visible' impact on affected towns and city centres, as the units occupied are large-format retail spaces, often anchoring a shopping centre or high street, and therefore their vacancy can often be highly prominent. The challenge for town centres is, owing to the changes in shopping patterns and continued uptake of online shopping, means in many cases there is a lack of demand from operators wishing to take some or all of the space, and therefore the units are in some locations — even in high profile locations such as London's Oxford Street, which currently has one of the highest levels of retail vacancy in the country — difficult to let.
- 3.13 In such instances, landlords and/or shopping centre owners are increasingly looking to ways to diversify the offer in order to let the space, including subdividing the unit into a parcel of smaller units; introducing additional food & beverage, leisure or complementary facilities; or in some cases converting upper levels to offices or even residential uses. It is important to emphasise that these changes were well underway before the Covid-19 pandemic; indeed the 2016 Study discussed (paras 3.5 to 3.8 and 3.11 to 3.13) the changing role of town centres and how commercial operator requirements were evolving. This transformation has therefore continued to take place since the 2016 Study but in the case of some larger centres, has arguably taken on a greater degree of urgency.
- 3.14 Both Oakham and Uppingham town centres are relatively small and compact, with the majority of retail floorspace being smaller, traditional retail units which are more suited to local / independent retailers and a relatively limited number of national multiple retailers. Whilst this has not made either centre entirely immune from changes in shopping patterns or wider economic circumstances, it does mean that both centres have not been subject to some of the sectoral changes in the comparison goods sector with operators downsizing store estates, exiting large flagship vacant units, or moving entirely online, as many of these retailers were not present in the County in the first place. Leicester and Peterborough have historically acted as the 'higher order' centres to which residents of the County travel for their comparison goods centres, and both of these locations can be considered to be more vulnerable to the wider sectoral changes than centres within the County.
- 3.15 The attractive, historic nature of both Oakham and Uppingham may also act to both centres' advantage for some of the retailers which are more actively expanding at the moment, although Uppingham's limited size and catchment will not be sufficient for many operators to consider. Operators such as Oliver Bonas, Waterstones and Gail's are selectively growing their store estate but tend to focus on smaller stores in historic, attractive, affluent locations, and Oakham in particular may present an attractive opportunity for more specialist / boutique retailers seeking to expand their store estate. The same attributes do, of course, make these locations attractive to specialist independent retailers as well.

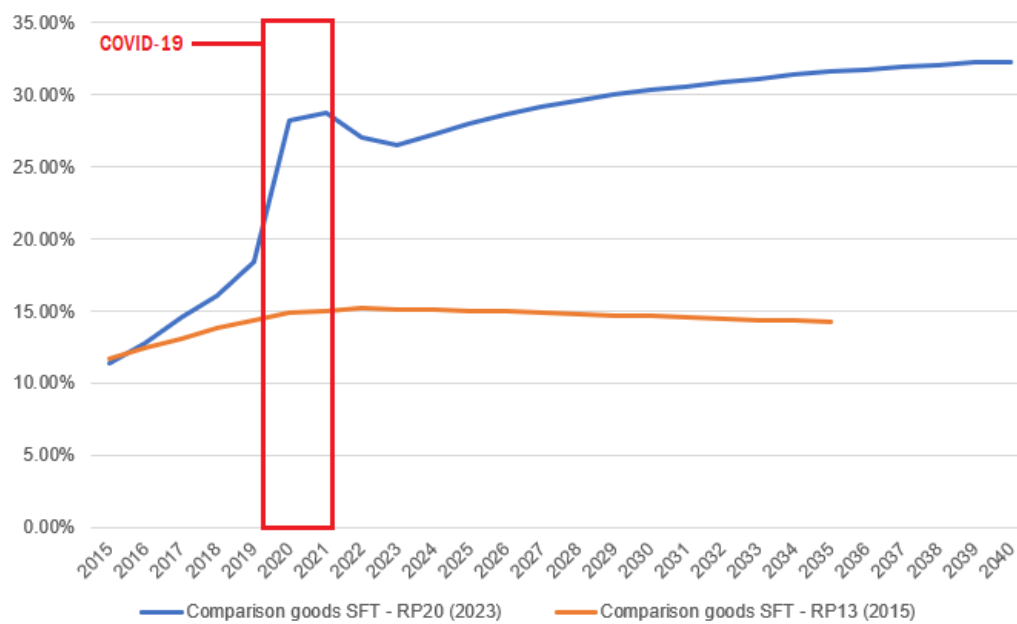
ONLINE SHOPPING & 'SPECIAL FORMS OF TRADING'

- 3.16 'Special forms of trading' is a term used to describe all shopping which does not take place within physical retail outlets. It can therefore include spend at markets and other specialist shopping destinations, but the majority of 'special forms of trading' (henceforth, SFT) is accounted for by online shopping. Guidance on how much of total available spend is forecast to be accounted by SFT is published annual by Experian in their Retail Planner Briefing Notes.

Comparison goods shopping

- 3.17 The 2016 Study forecast that SFT accounted for 11.7% of total available comparison goods spend in 2015 (the 'base year' of that study), and that comparison goods SFT would then increase to a peak of 15.0% in 2025, before declining back slightly to 14.3% of total available comparison goods spend by 2036. These forecasts were derived from Experian Retail Planner Note 13 ('RP 13'), which was the most up to date guidance at the time of preparation of the 2016 Study.
- 3.18 It has been widely reported that the Covid-19 pandemic accelerated the influence of online shopping over the shopping patterns of consumers in the UK, significantly amplifying the rates of online shopping which were already taking place, particularly in respect of comparison goods shopping. Such a trend is not surprising given the enforced lockdowns during the first year of the pandemic presented only limited opportunities for physical retail shopping, particularly for non-essential comparison goods shopping such as clothing, footwear and homewares.
- 3.19 The most recent guidance published by Experian (RP20, February 2023) has regard to this, plus the extent to which patterns of online shopping have 'settled down' after the changes in shopping patterns which the pandemic necessitated. RP20 identifies that SFT currently (2023) accounts for 26.5% of total available comparison goods spend as a UK average, and forecast that UK average this will increase to 30.3% by 2030, 31.6% by 2035 and 32.3% by 2040. In other words, therefore, SFT's claim on total available comparison goods spending is forecast to be at least double the amount it was in the 2016 Study, for the entire duration of the study period, as shown visually in **Figure 3.1**. This has important implications for levels of quantitative retail need which will need to be planned for.
- 3.20 The current UK average comparison goods SFT of 26.5% is a decline from the peak of 28.7% recorded during 2021, the second year which Covid-19 impacted on shopping patterns, with periods of closure of 'non-essential' comparison goods retail stores. This therefore indicates that some consumers have shifted their spending back to physical retail stores following stores reopening. However, in 2019, the final full year before the pandemic, comparison goods SFT was considerably lower, at 18.4%, and therefore crucially, much of the additional spend which transferred online during the pandemic has not returned to being spent in physical retail stores.
- 3.21 Evidence from the household telephone survey undertaken in support of this study indicates that levels of SFT for comparison goods within the survey area are on average significantly higher than the UK average identified in RP 20, and in some parts of the survey area account for over one-third of total comparison goods spending. This is discussed further in **Section 8** of this report.

Figure 3.1 SFT as a % of total available comparison goods spend – 2016 vs 2023



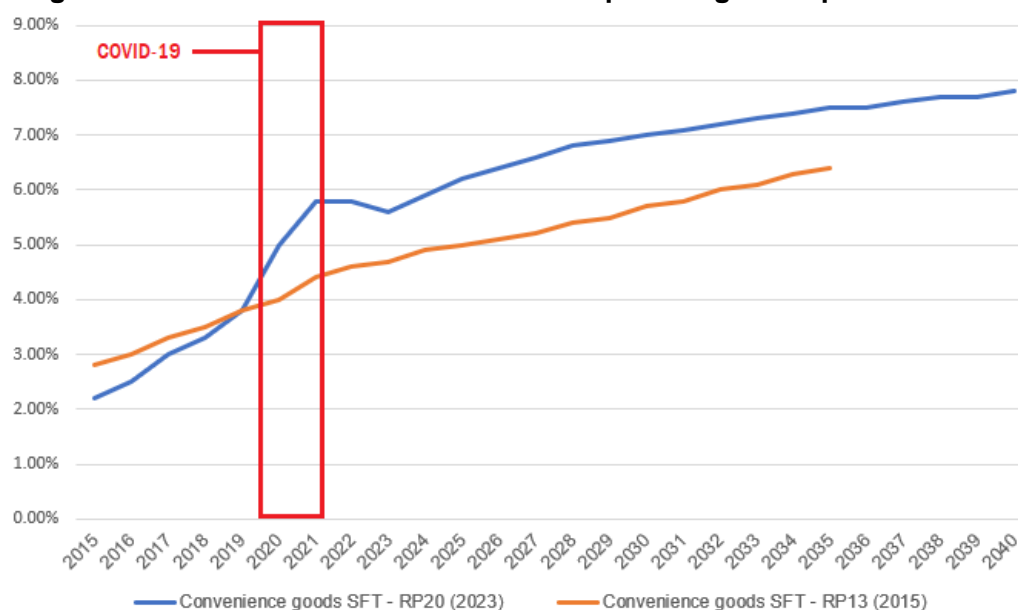
Source: Experian Retail Planner Briefing Note 20 (2023) and Experian Retail Planner Briefing Note 13 (2015), the forecasts of which were used in the 2016 Study. Note – RP 13 did not SFT provide forecasts beyond 2036.

Convenience goods

- 3.22 In respect of convenience goods shopping, there has also been an uptake in the amount of spend which is directed towards SFT. However, The sector continues to account for a significantly lower SFT claim than the comparison goods sector, with the majority of spend continuing to be accounted for by purchases in physical stores. At the time of the 2016 Study, Experian identified that 2.8% of total available convenience goods spend was accounted for by SFT (at the 2015 base year of that study), and this would increase to 6.4% by 2036.
- 3.23 The most recent guidance from Experian (RP20) identifies that convenience goods currently accounts for 5.7% of total convenience goods spend, and this will increase to 7.7% by 2040. The gap between the forecasts provided by Experian in the 2016 Study (RP 13) compared to those set out in RP20 is significantly less pronounced than is the case with comparison goods SFT discussed above (see **Figure 3.2⁴**). Overall it is forecast that convenience goods SFT will continue to account for a significantly lower 'claim' on spending than comparison goods. Even during the pandemic-affected year of 2021, only 6.3% of convenience goods spend was spent through SFT, indicating the majority of spend continued to take place through physical retail stores.

⁴ Attention is drawn to the fact that the scale on the X-axis is different between Figures 3.1 and 3.2.

Figure 3.2 SFT as a % of total available comparison goods spend – 2016 vs 2023



Source: Experian Retail Planner Briefing Note 20 (2023) and Experian Retail Planner Briefing Note 13 (2015), the forecasts of which were used in the 2016 Study. Note – RP 13 did not SFT provide forecasts beyond 2036.

- 3.24 The household survey results show there to be considerably higher rates of SFT for convenience goods shopping across the survey area than the current UK averages set out above, with convenience shopping SFT rates approximately 2.5 times higher as an average across the survey area. Further discussion of this point is provided at Section 9 of this report.
- 3.25 The SFT rates forecast by Experian are, for both comparison and convenience goods, an important consideration as the higher the proportion of spend which is diverted to SFT/online shopping, the lower the residual spend which is available to support new physical 'bricks and mortar' floorspace, although it is important to caveat that such forecasts need to carefully be considered 'in the round' alongside updated population projections, information on shopping patterns and so on.

CLICK & COLLECT

- 3.26 The 2016 Study highlighted the growing role of 'click & collect' in shopping patterns and this has continued to become a service widely adopted by retailers, often with enhanced delivery times and the option for next day deliveries to stores. Research published by Barclays in October 2022 identified the click & collect market to be worth over £42bn in 2022, equivalent to 8.4% of the UK's total retail spending. Click & collect is identified by Barclays as now accounting for 40% of sales for retailers who offer the service, an increase from 37% in 2021.
- 3.27 It also identifies that 41% of physical stores in the UK are used as click & collect locations, with the same amount also used to process returns. This reflects the expansion of the click & collect network in recent years — whereas historically click & collect was undertaken at the local branch of the retailer in question, the expansion by delivery companies and retailers to use partner locations has greatly expanded the store network of click & collect locations.
- 3.28 For example, the courier company Evri now offers click & collect from many branches of Tesco Express, whilst John Lewis and Amazon have partnered with Co-Op to enhance their click & collect

network. Other locations such as Post Offices, local convenience stores and dry cleaners have also taken on an important role as click & collect locations, offering more opportunities for consumers to be able to collect at a time and location convenient for them. Click & collect also presents potential benefits to wider town centres, as residents using click & collect facilities will assist in driving footfall and potentially linked spending trips, although we are not aware of any recent research which has explored the extent of this relationship. The expansion of click & collect facilities to local and neighbourhood retailers does mean however that there is scope for centres at all level of a retail hierarchy to potentially benefit from this trend.

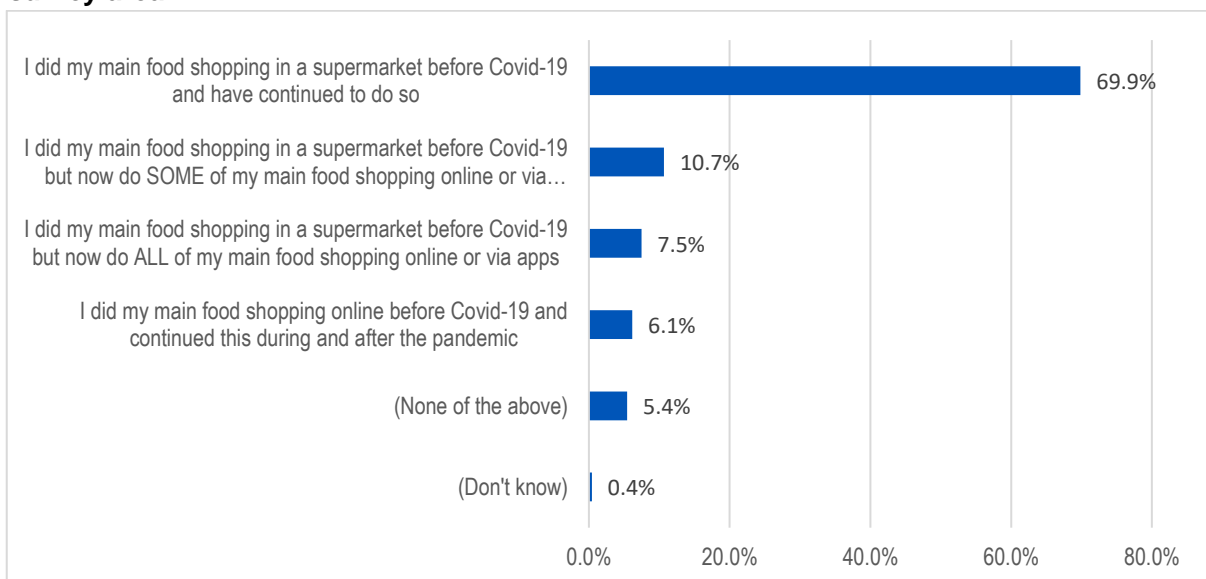
THE IMPACT OF COVID-19 ON SHOPPING PATTERNS

- 3.29 The household survey undertaken in support of this survey asked respondents the extent to which their shopping patterns had altered as a result of the Covid-19 pandemic, for main/weekly food shopping, top-up/basket shopping, and shopping for clothing & footwear (which historically has been one of the main footfall drivers in town centres in terms of comparison/non-food shopping). We summarise the key findings of the household survey in respect of these points below.

Convenience shopping

- 3.30 For main food shopping, the survey findings indicate that the majority of residents in the survey area continue to visit local supermarkets. Almost 70% of respondents stated that they undertook their main food shopping in a supermarket prior to Covid-19 and have continued to do so. 10.7% stated that they have now switched to undertaking some (but not all) of their main food shopping online, whilst just 7.5% stated that they undertook their main food shop in a supermarket prior to Covid-19 but have now entirely switched to online shopping.
- 3.31 For those respondents who did their last food shop online, the most popular retailer was Tesco (29.5%) followed by Asda (24.5%), Sainsbury's (15.0%), Ocado (11.0%) and Morrisons (10.9%).

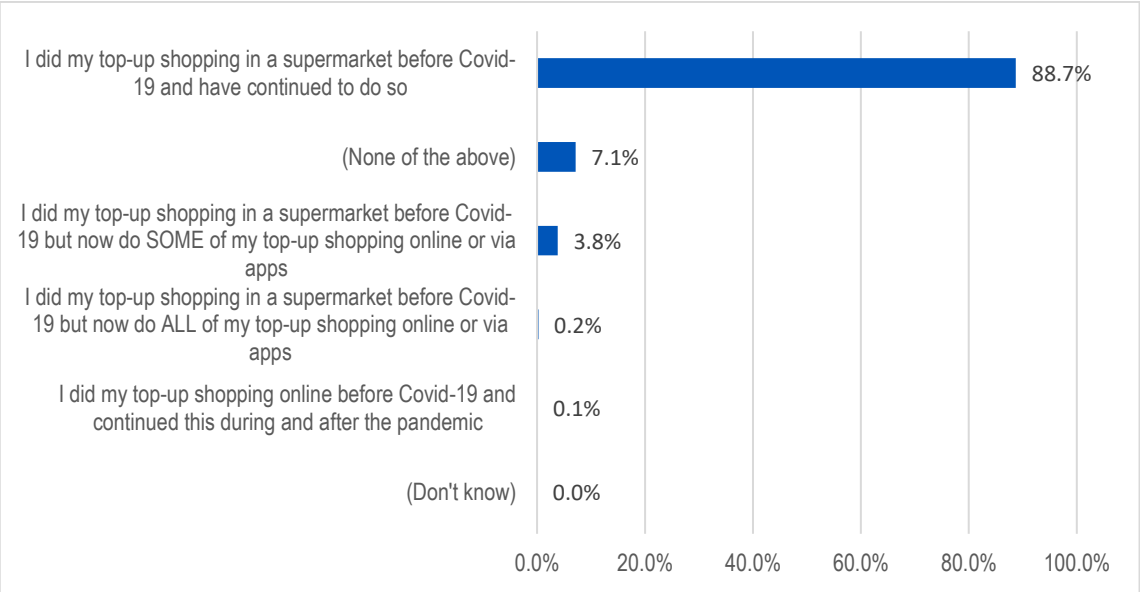
Figure 3.3 The impact of Covid-19 on main food shopping patterns for residents in the survey area



Source: household survey results

3.32 For top-up/basket shopping, there was less indication of any significant changes to shopping patterns relative to pre-Covid levels. This is perhaps to be expected given that top-up shopping is often more impulsive and/or aligned with other trips. However, the rise of the rapid delivery sector, where groceries can be ordered and delivered through apps such as Deliveroo and, Getir, does offer the opportunity for top-up shopping patterns to be altered. The household survey results indicate that 88.7% of respondents undertook their top-up shopping in a supermarket before the pandemic and have continued to do so, whilst 3.8% of respondents now do an element of their top-up shopping online but continue to also visit physical stores. Only 0.2% of respondents have undertaken a full shift to doing all of their top-up shopping online.

Figure 3.4 The impact of Covid-19 on main food shopping patterns for residents in the survey area



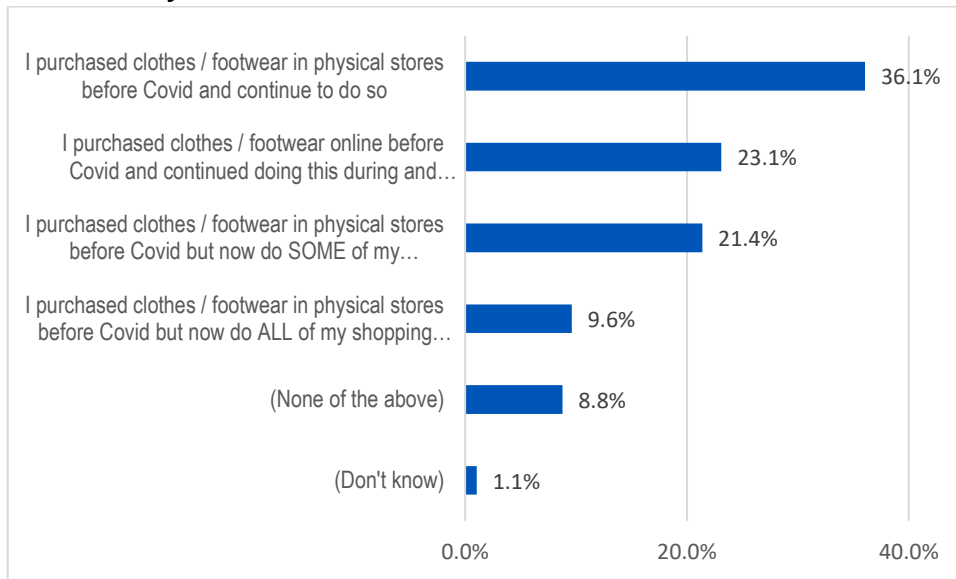
Source: household survey results

Comparison shopping (clothing & footwear)

3.33 For clothing & footwear, the household survey results provide indication of more significant changes in behaviour for residents in the survey area. 36.1% of respondents stated that they previously purchased clothing and footwear online in physical retail stores, and have subsequently continued to do so. However, almost one-quarter of residents (23.1%) were already shopping for clothing & footwear items online prior to the pandemic and have subsequently continued to do so. A further 21.4% have migrated some of their physical store spending online, whilst 9.6% of respondents now undertake all of their clothes shopping online having previously done this entirely in physical retail stores prior to the pandemic.

3.34 It should be noted that this question was not asked for other types of comparison goods shopping activity in order to keep the length of the household survey to a satisfactory level.

Figure 3.5 The impact of Covid-19 on clothing & footwear shopping patterns for residents in the survey area



Source: household survey results

Broader trends

- 3.35 More broadly, the main beneficiaries of the pandemic in respect of shopping patterns have been local town centres and locations such as market towns, district and local centres, as — aligned with an increased usage of online shopping channels (as discussed above) — people reduced travelling to ‘high order’ centres for shopping and directed their spend towards more local shopping facilities. For example, at the outset of the pandemic in spring 2020, district centres saw a decline in footfall of only 34.5%, compared to 75.9% for city centres. This was due to residents not travelling into city centres for work and/or shopping, but instead working from home — and therefore centres more local to their place of residence benefited from increased footfall as a result.
- 3.36 There has, of course, been a degree of rebalancing of the shifts to home-working seen at the outset of the pandemic and many office-based companies now seek to offer a ‘hybrid’ model for employees. Nevertheless, this continues to offer scope for town, district and local centres close to an employees’ place of residence to benefit from additional footfall and spend relative to the case prior to the pandemic. Local town centres will potentially need to cater for the needs of significantly larger daytime catchment populations than was the case previously, if increasing numbers of people work from home, even for only some of the week. Town centres which are able to provide a comprehensive range of day-to-day shopping and local services — possibly along workspace / co-working facilities where local residents are able to work away from home or undertake meetings — are likely to continue to retain positive levels of vitality and viability in the medium to long term therefore.

WIDER ECONOMIC CONSIDERATIONS

- 3.37 Experian’s Retail Planner Briefing Note provides an overview of the wider economic considerations which need to be taken into account when considering growth in retail and leisure spending. RP20 comments that:

‘The UK economy — like much of the rest of the world — continues to face significant headwinds in the form of surging inflation, high energy costs and supply chain disruptions. Even as the impact of the Covid-19 pandemic eases, the economic consequences of the Ukraine-Russia conflict continue to impact the outlook’ (pg2).

- 3.38 In terms of the near-term economic outlook Experian advise that growth in the UK economy stalled in the final quarter of 2022, and that any return to growth will be ‘hampered by stubborn inflation, tight fiscal policy and heightened uncertainty. Consumer sentiment is already at a low ebb and the squeeze in household incomes is set to continue’ (pg4). Whilst Experian forecast a ‘fragile return to growth’ in the short term, risks remain given the uncertain global economic backdrop.
- 3.39 The high levels of inflation, together with associated rising interest rates as the Bank of England tries to cool down the economy, is underpinning a continued weakness in consumer which will impact consumer spending in the short term. This appears most likely to influence comparison goods spending, which is forecast to decline, with customers postponing major purchases such as the replacement of white goods. These factors are, of course, also affecting business confidence, and Experian forecast that cost pressures and uncertainly dent hiring intentions, meaning that the current very low levels of unemployment may increase.
- 3.40 Over the medium term, Experian anticipate that fiscal policy is likely to act as a constraint on growth levels, as spending cuts or tax rises may be required to offset measures put in place to support consumers during the cost of living crisis. The extent to which a recovery takes place will ultimately be shaped by the continued after-shocks from the Covid-19 pandemic, and how successful government measures are in mitigating its economic impacts, alongside the impacts arising from the cost of living crisis on households and businesses. The wider global backdrop and ongoing conflict in Ukraine also has scope to impact trade and supply chains through to the medium term. Interestingly, Experian also highlight that the extent to which hybrid / flexible working models remain in place in the medium term could also impact the medium-term economic outlook.
- 3.41 The long-term outlook is more difficult to forecast, and Experian identify that ‘the longer term growth potential of the UK economy will be driven largely by supply side factors such as the size of the population and labour force, structural employment and productivity, as well as the how the economic relationship between the EU and UK ultimately transpires. The above factors influence Experian’s ‘central case’ economic forecast which we adopt for the purposes of this study; however it is important to note that Experian only attach a 40% probability to this scenario, and accordingly we recommend that the Council’s retail capacity forecasts continue to be reviewed throughout its new Local Plan period to ensure that any changes to longer-term expenditure growth projections are captured. The fact that Experian are only able to attach a 40% probability to the forecasts is evidence of the volatility of the current economic situation.

Section 4

The surrounding network of centres

- 4.1 The 2016 Study identified that centres in Rutland compete for spending, particularly in relation to shopping for comparison goods, with destinations in Leicester, Peterborough, Stamford, and to a lesser extent Corby and Melton Mowbray. The updated household survey undertaken in support of this study confirms this to remain the case, although there have been some changes in the popularity of certain competing destinations vis-a-vis others (Corby, for example, has a greater influence over comparison goods spending now compared to Peterborough, relative to the position in the 2016 Study).
- 4.2 Whilst a full discussion of comparison goods shopping patterns is set out in **Section 7** of this report, to assist with contextualising the findings of this, in this section we present a brief recap of the offer in the network of competing centres, highlighting any key changes in provision which have taken place since the 2016 Study.

LEICESTER

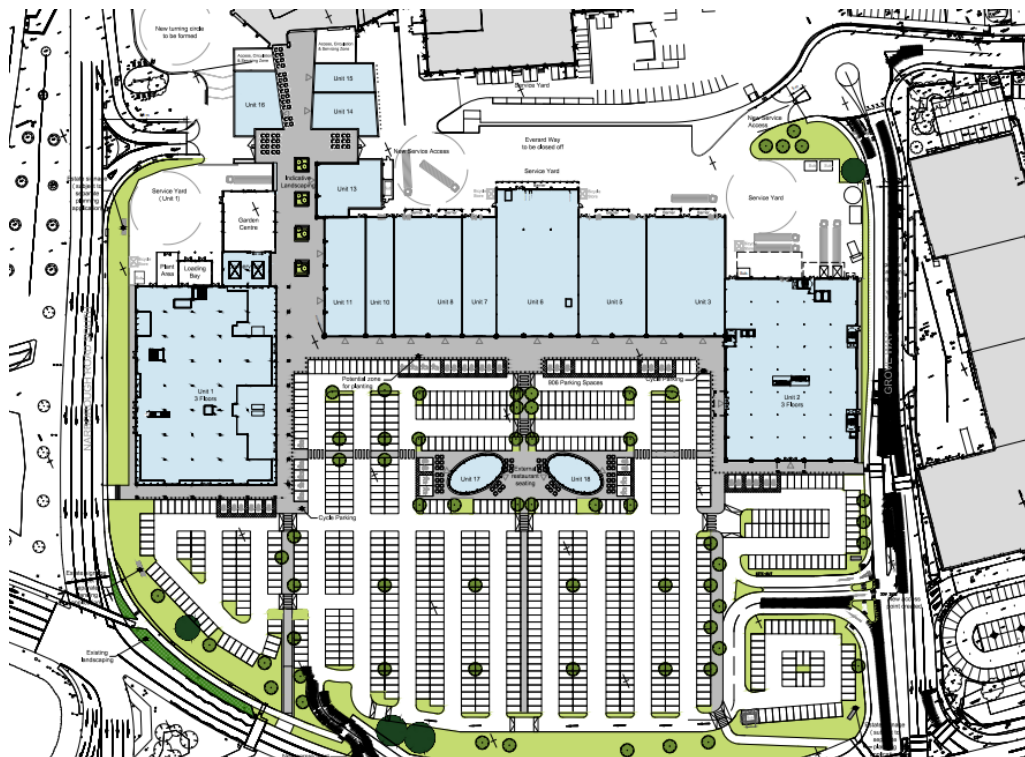
- 4.3 Leicester city centre continues to benefit from a strong retail offer which, for the most part, appears to have weathered the Covid-19 pandemic fairly well. The Highcross development which opened in 2008 continues to act as the prime retail pitch in the city centre, and retains its John Lewis anchor store. The former House of Fraser store has been repurposed into two large format retail stores, which have been occupied by JD and Zara (both of whom have expanded their presence in the city), as well as some commercial leisure uses such as Treetop Adventure Golf.
- 4.5 However, Highcross currently does have a relatively high level of vacancy. The shopping centre was placed into receivership in March 2023, having been actively marketed for sale by its former owners, Hammerson, since 2021, when profits were significantly impacted by the Covid-19 pandemic. A number of high profile national retailers or leisure operators within the development entered administration or significantly cut back their store estate in recent years, some as a consequence of the Covid-19 pandemic, and others as a result of longer-term challenges to their operation. In Highcross, the large former Topshop/Topman unit remains vacant, as does the large former Zara unit which was vacated when the retailer upsized (see above). A number of leisure operators in the centre such as Bills, Handmade Burger Co and Carluccios have also closed and their units are yet to be filled, although the centre has successfully attracted a handful of new leisure operators such as Slim Chickens. Planning permission has been granted for the large former Debenhams department store to be demolished and redeveloped as residential accommodation.
- 4.6 Outside of the Highcross development, the other retail 'anchors' in the city centre continue to operate, including Marks & Spencer, Primark and TK Maxx. Haymarket Shopping Centre continues to perform a complementary role and function to Highcross as a more discount-orientated retail destination. Gallowtree Gate, where M&S is located, continues to feel more of a secondary shopping location since the opening of Highcross, but has been bolstered in recent years through the opening of a new Flannels clothing store in the former BHS, and casual dining operators Pret a Manger, Taco Bell and Popeyes have also opened.

- 4.7 The independent quarter of the city centre around The Lanes appears to be performing well, and the small St Martins Square shopping centre has successfully reinvented itself as a casual dining location, attracting independent and specialist national operators including Mowgli, Pai pizza, Giggling Squid and The Bottle Garden. Significant investment has also taken place in improving facilities at Leicester Market, and investment in its tourism and visitor offer, as well as improvements to St Margaret's Bus Station. It is understood that the large Wilko store at Lee Circle will be occupied by Poundland, following Wilko entering administration.

Fosse Park

- 4.8 A significant change to shopping provision in the surrounding catchment area has been the opening of a second phase of the out-of-town retail destination Fosse Park, on the western side of Leicester close to the M1. Although on the opposite side of the Leicester urban area from Rutland, the centre benefits from good levels of accessibility from Rutland via the A47. The opening of this second phase of the site appears to have influenced shopping patterns of residents in the County who look towards Leicester for their comparison goods shopping, as is discussed further in Section 7.
- 4.9 The second phase of development has introduced a number of new 'high street' retailers to the development including a larger Next store, H&M, TK Maxx and an improved food & beverage offer. The original Fosse Park scheme continues to be anchored by a flagship regional Marks & Spencer store, alongside a large branch of Primark which occupies a former BHS unit. There is also a 'retail warehouse' element of the development which includes bulky goods and furniture retailers. The entire development benefits from free car parking, which is likely to be a driver behind its popularity from residents in the County.

Figure 4.1 Floorplan of Fosse Park extension, with original development shown in grey to north and east



Source: Blaby District Council

PETERBOROUGH

- 4.10 Peterborough is an established comparison goods shopping destination to the south-east of the County, which has a more limited retail offer compared to Leicester, but unquestionably acts as a 'higher order' centre relative to those in Rutland. As Section 7 sets out, Peterborough's comparison goods market share from the survey area has declined since the 2016 Study, which in turn noted a decline in market share relative to the previous retail study to that.
- 4.11 In March 2021, the John Lewis Partnership confirmed that its store in Peterborough's Queensgate Shopping Centre would be one of eight department stores which would not reopen following the enforced closure of non-essential retail stores during the Covid-19 pandemic. The store anchored the retail offer in the Queensgate Centre. In July 2023 it was announced that Frasers (formerly House of Fraser) would take over the majority of the former John Lewis unit, with an intended opening of Christmas 2023. The Beales Department Store in Westgate in the city centre also closed during the pandemic, before briefly reopening and then subsequently closing again, and has recently been put on the market.
- 4.12 Queensgate does, however, continue to focus as the hub of Peterborough's comparison goods shopping offer and maintains a relatively high level of occupancy. Retailers trading in the centre include M&S, H&M, Primark, TK Maxx (who have relocated into a new store in the centre), New Look and River Island. A new indoor golf centre, Putt Shack, opened on the 3rd floor of the shopping centre in 2022. A cinema is also planned to open in Queensgate; it is understood that the shell of this has been constructed but opening has been delaying following the intended operator, Empire Cinemas, entering administration. A new operator has yet to be confirmed at the time of preparation of this study (September 2023).

CORBY

- 4.13 Corby's offer and market position remains broadly unchanged from that set out in the 2016 Study. Willow Place in Corby, which opened in 2007, continues to enjoy a strong lower to mid-market retail offer with representation from retailers such as Primark, TK Maxx, New Look, River Island and H&M. The wider town centre has a mid market-to-value-orientated retail offer with representation from retailers such as Superdrug, Poundstretcher and Poundland, alongside a supporting range of retail services. A TJ Hughes department store recently reopened in the town centre. A new cinema, operated by independent cinema operator Savoy, opened in July 2015.

STAMFORD

- 4.14 Stamford has not witnessed any major development schemes since the 2016 Study but continues to have an upscale-led retail offer with retailers such as M&S Foodhall, Neal's Yard Remedies and gourmet food shop Cook sitting alongside more day-to-day retailers in the town centre. A new Oliver Bonas (fashion/homewares) store commenced trading in the centre in early 2023.

Section 5

Oakham town centre health check

5.1 In this section we provide an updated assessment of the performance of Oakham town centre against the 'town centre health' indicators set out at paragraph 006 of the 'Town Centres & Retail' Planning Practice Guidance ('PPG') (as amended, 2020). The town centre health check indicators have expanded in range and scope from those which were used at the time of the 2016 Study, with additional indicators introduced into the PPG in an update published in 2020, such as the balance between independent and multiple stores; evidence of barriers to business expansion; and opening hours / extent of an evening and night time economy offer.

5.2 The 'health check' indicators set out in the Town Centres & Retail PPG are as follows⁵:

- diversity of uses
- proportion of vacant street level property
- commercial yields on non-domestic property
- customers' experience and behaviour
- retailer representation and intentions to change representation(*)
- commercial rents(**)
- pedestrian flows
- accessibility – this includes transport accessibility and accessibility for people with different impairments or health conditions, as well as older people with mobility requirements.
- perception of safety and occurrence of crime
- state of town centre environmental quality
- balance between independent and multiple stores(***)
- extent to which there is evidence of barriers to new businesses opening and existing businesses expanding*
- opening hours/availability/extent to which there is an evening and night time economy offer

5.3 To assess these, our analysis draws on:

- published industry data such as Goad Plans of town centre uses provided by Experian;
- 'Category Reports' of town centre diversity also provided by Experian;
- other relevant information by third parties and desktop research which is available within the public domain;
- the findings of the household survey undertaken in support of this study, which asked questions on local residents' usage of town centres;
- Observations made during site visits to the town centre in May 2023.

5.4 The exercise is repeated for Uppingham town centre in the following section of the report.

⁵ (*) For this indicator, information on currently retailer representation only is available. (**) For this indicator, no information is available within the public domain. (***) This indicator is considered as part of our discussion on retailer representation.

Diversity of uses

- 5.5 The diversity of uses of a town centre is a critical indication of its overall vitality and viability. A diverse town centre with a broad range of retail (food and non-food), leisure and other complementary uses, which operate across different periods of the day, is critical in drawing in repeat footfall and spending, and encouraging dwell time.
- 5.6 The data provider Experian assesses town centre diversity in their 'Category Reports' which are published on an annual basis for both Oakham and Uppingham town centre. The most recent survey of Oakham was undertaken by Experian in February 2023, and therefore can be considered to be an up-to-date assessment of the diversity of uses of the centre. A summary of the diversity of uses of the centre is provided in **Table 5.1**.

Table 5.1 Diversity of uses, Oakham town centre

Goods category	Number of outlets	% of total	UK average % (Feb 2023)	Difference to UK average %
Comparison goods	62	28.7%	26.8%	+1.9%
Convenience goods	22	10.2%	9.3%	+0.9%
Retail services	44	20.4%	15.8%	+4.6%
Other retail	0	0%	0.1%	-0.1%
Leisure services	47	21.8%	25.5%	-3.7%
Financial & business services	17	7.9%	8.7%	-0.8%
Vacant	24	11.1%	13.8%	-2.7%
TOTAL	216	100%	100%	-

Source: Experian Category Report, February 2023

- 5.7 Table 5.1 shows:
- Oakham town centre continues to have a strong retail function, with the proportion of both comparison and convenience goods both remaining above the UK average. Interrogation of the Experian data shows the town centre to be particularly well provided for against UK averages in terms of clothing retailers (8 in the town centre), sports/outdoor goods (3 in the town centre) and charity shops (6 in the town centre). Charity shops have become an established features of town centres and can often act as important footfall generators in their own right.
 - On the convenience side, the town centre has 22 convenience outlets but an important feature of Oakham's offer is its range of independent / specialist convenience operators, which assist in providing a diverse retail offer, encouraging people to shop local and frequently. For example, the town centre contains five bakers/ confectioners, two butchers, and two grocers / delis, but currently does not have a specialist fishmonger and greengrocer. The resurgence of the 'shop local' movement particularly since the pandemic means there is increasingly scope for these type of businesses to become re-established. The large Tesco supermarket in the town centre

does, nevertheless, act as the primary convenience goods 'anchor' to the wider town centre, and its location to the immediate south of the High Street affords opportunities for linked shopping trips with the wider town centre offer.

- Retail services — which includes dry cleaners, hair & beauty, opticians, travel agents, post offices, photo processing and so on — is particularly strongly represented, accounting for over 1 in 5 units in the town centre (20.4% of units – 4.6% above the current UK average). This strong representation is predominantly driven by the large number of hair & beauty retailers, with a total of 30 across the town centre, accounting for 13.9% of all units in the town centre.
- Leisure services — which includes cafes, bars, restaurants, pubs, hotels, take-aways and sports facilities, is under-represented against current UK averages by a noteworthy amount (3.7% below current UK average). These uses are important in providing a complementary town centre offer, and therefore increased representation in this sector would likely benefit the overall vitality of the centre. The town centre contains nine cafes, four bars/wine bars, four pubs, and 11 restaurants.
- The proportion of cafes, bars/wine bars and pubs are all below these sectors' respective UK averages, whilst the proportion of restaurants is in line with UK average figures. The town centre also contains four hotels/ guest houses which is higher than the UK average, which can be considered a positive trend. There are 11 fast food / take-away shops in the town centre, equivalent to 5.1% of all units, below the UK average of 6.1% for these type of uses.
- The proportion of financial & business services — which includes banks, building societies and financial services — accounts for 7.9% of all units in the centre, slightly below the current UK average of 8.7%. Most units in this sector are accounted for by financial services, and it is significant to note that Oakham now only has one bank (HSBC) and one building society (Melton Building Society) trading in the town centre. A second bank in the town centre (Barclays) closed at the end of April 2023.
- Vacant units are discussed separately below.

5.8 Overall, the above analysis shows that Oakham continues to benefit from a diverse range of retail and services uses, with the finding most of note is the under-representation of the leisure services sector, and there may therefore be scope for further improvement of the offer of the town centre in this respect.

5.9 Whilst remaining above the current UK average, it is noteworthy that the proportion of uses in the town centre which are given over to comparison goods is significantly lower than was the case at the time of the 2016 Study, reflecting the evolution of the role and function of town centres since this time. In the 2016 Study, 34.6% of units in the town centre were occupied by comparison goods retailers; a figure which the 2016 Study identified as being in line with UK averages at the time. Both Oakham's and the UK average figure for comparison goods as a percentage of the overall total has now fallen below 30%. The decline in the contribution which comparison goods makes to the overall town centre offer as a UK average has been offset by increases in convenience goods and leisure services.

Proportion of vacant street level property

- 5.10 The Experian Goad Category report for Oakham town centre identified a vacancy rate for Oakham town centre of 11.1% at February 2023; it is positive to note that the vacancy rate is 2.7% below the current UK average of 13.8%. The vacancy rate in the town centre is virtually identical to that identified in the 2016 Study of 11.2%, suggesting that the town centre has weathered the impact of Covid-19 and the changes in shopping patterns which this brought about relatively well.

Figure 5.2 Vacant units in Oakham town centre, February 2023



Source: Experian Goad, February 2023

- 5.11 **Figure 5.2** shows the location of vacant units in the town centre. It shows that there is no particular concentration of vacant units in the centre, suggesting that there are no sub-areas of the town centre which appear to be struggling for vitality. However, there are examples of prominent vacant units within the centre. These include:
- The recently-vacated Barclays unit on High Street, and the adjacent Loros charity shop unit which is identified as being under refurbishment.
 - The former 'Rutland Toys & Dance Boutique' at 34 High Street (known as Flores House). This unit has been boarded up following the most recent occupant vacating the premises, which

presents a significant detraction from the environmental quality in this part of the town centre, particularly given the fact that the building itself is Grade II*-listed and, if sensitively reoccupied, offers potential to be a significant asset to the centre.

- The former Lloyds TSB and FatFace units on High Street, which bookend either side of the junction with Church Street. Both units are in a relatively good state of repair but the FatFace unit in particular is very noticeably vacant when walking past given both the depth of the unit and its relatively generous frontage to the High Street. Positively, however, it is understood that the former FatFace has recently been re-let and will be opening as a bakery.

5.12 Experian's analysis identified a total of 24 vacant units in the town centre. From our visit to the town centre in May 2023 we noted a small number of changes to the vacant units in the town centre, for example a prominent restaurant ('The Dovetail') at the western end of High Street closing down, and a couple of units which were let / under alteration on Mill Street. We also noticed a small number of errors in the Experian Goad data, but do not believe these to materially impact on the overall vacancy rate. We also noticed a small number of instances where a unit has become vacant as a consequence of its operator upsizing and moving into larger premises elsewhere in the town centre, which clearly can be considered a positive reflection on its overall vitality.

5.13 Overall, it is recommended that the town centre vacancy rate continue to be carefully monitored, and action taken to reduce the visual impact which those units which are long term vacants have on the overall environmental quality of the centre.

5.14 The vacancy rate of 11.1% does not — in the context of the current economic circumstances and having regard to the fact that the wider performance of the town centre can overall be considered positive — present us with significant cause for concern, but should be closely monitored. The fact remains that over 1 in 10 units are vacant, and therefore the Council should work with landlords and other relevant parties to secure the positive re-use of vacant units wherever possible, ideally for continued class E use.

Customers' experience and behaviour

5.15 The household telephone survey which was undertaken in support of this study asked respondents questions on their usage of Oakham and Uppingham town centres. Questions were only asked to respondents who stated that they use Oakham and Uppingham town centres for shopping and related purposes. The key findings in respect of Oakham town centre are summarised below.

Frequency of visits

5.16 For those residents who stated that they visit Oakham town centre, the most popular frequency of visit was 'at least once a week' (33.05% of respondents), followed by 'at least two times a week' (20.65%) A further 4.97% of respondents stated that visit the town centre daily. Therefore, in total approximately 50% of respondents visit the town centre at least once a week, and often multiple times, indicating that it serves a variety of shopping needs and benefits from strong levels of local patronage. A further 12.99% of respondents visit at least once a fortnight.

Main purpose of visit

5.17 The most popular reasons for visiting Oakham town centre were as follows:

- undertaking food shopping (26.35% of respondents)
- undertaking non-food shopping (19.59% of respondents)
- visiting cafes and restaurants (9.39% of respondents)
- window shopping / browsing (8.39% of respondents)
- visiting friends / relatives (7.12%)

5.18 Shopping for food / non-food items is therefore the main driver of visits to the town centre by some margin, with almost 50% of respondents identifying this to be the main reason for their visit to the centre.

Linked trips

5.19 Respondents were also asked what other activities / services they used when visiting the town centre. The most popular response to this was non-food shopping (28.88%), indicating that whilst food shopping is driving many respondents' visits to the centre, they are undertaking non-food shopping trips at the same time. The second most popular 'linked' purpose was visiting cafes / restaurants (26.11%), affirming the importance of this sector to the overall vitality of the centre. Other 'linked' reasons were food shopping (15.22%), visiting health services (8.11%) and window shopping / browsing (7.14%). 24.49% of respondents stated they did not undertake any linked trips.

Likes and dislikes

5.20 When respondents who use Oakham town centre were asked what they liked about the town centre, the most popular responses were as shown in **Table 5.3**. It can be seen that users of the centre value its proximity, accessibility, atmosphere and environmental quality, all of which are clearly factors which contribute to an overall successful town centre, and interestingly these factors were all listed by respondents ahead of the choice/range of shops in the town centre.

Table 5.3 Most liked attributes of Oakham town centre

Rank	Attribute about Oakham town centre which respondents liked	% of responses*
1	Close to home	27.09%
2	Nice atmosphere, friendly people	21.59%
3	Familiarity, knowing where everything is	12.13%
4	Environmental quality of the town centre / attractive setting	11.06%
5	Choice and range of shops	10.32%
6	Compactness / shops close together	8.85%
7	Quiet / not too busy	8.27%
8	Choice of leisure facilities, e.g. pubs / restaurants	7.47%
9	Convenient car parking	7.27%
10	Easy to get to by car	5.81%

Source: Household survey results

- 5.21 **Table 5.4** shows the factors which users of Oakham town centre disliked. The number of empty shops in the centre is, by some distance, the attribute which attracted the most responses — almost one quarter of the total. It is possible that this may be driven by, as we discussed above, the fact that a number of the vacant units in the town centre are in highly prominent locations and may lead to perceptions that the town centre is struggling for vitality to a greater extent than may, in reality, be the case. Just over 10% of respondents expressed concerns about the lack of choice / range of non-food shops, and that there is not enough parking spaces. It is worth noting that over one-third (35.39%) of respondents stated that there was ‘nothing’ they disliked about Oakham town centre.

Table 5.4 Most disliked attributes of Oakham town centre

Rank	Attribute about Oakham town centre which respondents disliked	% of responses
1	Empty shops	23.27%
2	Lack of choice & range of non-food shops	10.86%
3	Not enough parking spaces	10.71%
4	Lack of choice & range of food shops	8.11%
5	Too many charity shops	7.75%

Source: Household survey results (excludes respondents who identified there was ‘nothing’ they disliked about Oakham town centre)

Method of travel

- 5.22 Over four-fifths of users of Oakham town centre (81.7%) travel to the town centre by car. A further 14.3% walk to the centre, whilst just 2.3% access the centre by bus.

Dwell time

- 5.23 **Table 5.5** shows the dwell time for visitors to Oakham town centre. In total, 52.95% of visitors spend under an hour in the centre, and 89.86% of visitors spend under 2 hours in the centre. Only 4.74% of respondents spend longer than 2 hours in the town centre. The fact that over half of all visitors to the town centre remain in the centre for under an hour suggests that there is potential for levels of dwell time to be extended if there is a compelling diverse / wider complementary offer to support the primary retail function, and the Council should seek to enhance the offer of the centre to enable those visiting for up to one hour to extend their stay longer than this. It is, however, considered that, given the relatively compact size of the centre, there is in reality likely to be limited scope for most users of the town centre to extend their stay beyond the two hour mark.

Table 5.5 Dwell time in Oakham town centre

Time spent in Oakham town centre	% of responses
1 - 10 minutes	1.18%
11 - 20 minutes	1.68%
21 - 30 minutes	9.87%
31 - 40 minutes	1.67%
41 - 50 minutes	7.09%

51 - 60 minutes	31.45%
61 to 90 minutes	14.82%
91 to 120 minutes	22.19%
More than 120 minutes	4.74%
(Don't know / varies)	4.69%

Source: Household survey results

Retailer representation & balance between independent and multiple stores

- 5.24 Oakham town centre is a small town centre which does not contain significant levels of representation from national multiple retailers. Experian Goad's Category Report (February 2023) identifies 28 out of the 216 units in Oakham town centre are occupied by multiple retailers, equivalent to 12.9% of the total. However, in floorspace terms, national multiple retailers account for 27.4% of all floorspace in the town centre, this figure largely driven by the large Tesco store on South Street. The Tesco store unquestionably acts as a key town centre anchor, driving footfall and supporting linked trips spending in the town centre; as noted above 26.35% of respondents stated they visit the town centre for food shopping as their primary purpose of visit.
- 5.25 Other national retailers present in the town centre include Boots (who operate separate pharmacy and hearing care/opticians outlets in the centre), Wilko (a long-standing second 'anchor' store behind Tesco, although this store is expected to close shortly following the company entering administration), QD Stores, Caffe Nero, McColls (newsagent), Ladbroke's, Wetherspoons, Cancer Research UK (charity shop), Specsavers and Timpson.
- 5.26 Oakham performs a role and function as the county town of Rutland, with an attractive and historic environment and specialist retail offer; as such it is only partly dependent on the presence of national multiple retailers to generate footfall and support its overall vitality. Its independent retail and leisure offer is also an inherent strength of the centre and can be expected to be an attractor of footfall in its own right, particularly from visitors. Independent retailers occupy many prominent units in the centre, e.g. Walkers of Oakham, and Otters Deli, and make an important contribution to the vitality of the town centre as a consequence.

Pedestrian flows

- 5.27 No formal pedestrian counts have been undertaken as part of this study, and we are not aware of any recent such work which has been undertaken by the Council or partner organisations in the town centre. From our visit to the town centre, we observed that patterns of pedestrian activity generally reflect those which have been historically reported in the Council's previous evidence base studies. There remains a clear distinction between the areas which have historically been defined as 'primary' and 'secondary' shopping areas in the town centre in terms of the amounts of observed pedestrian activity. From our visit, we observed the following:
- High Street remains the clear focus of pedestrian activity in the town centre, particularly between Market Place and Church Street, with both sides of the High Street observed to be busy. This reflects the fact that most of the key shopping anchors / attractors are located in this stretch, such as Boots, the Post Office, Pickfords pharmacy, Walkers of Oakham etc.

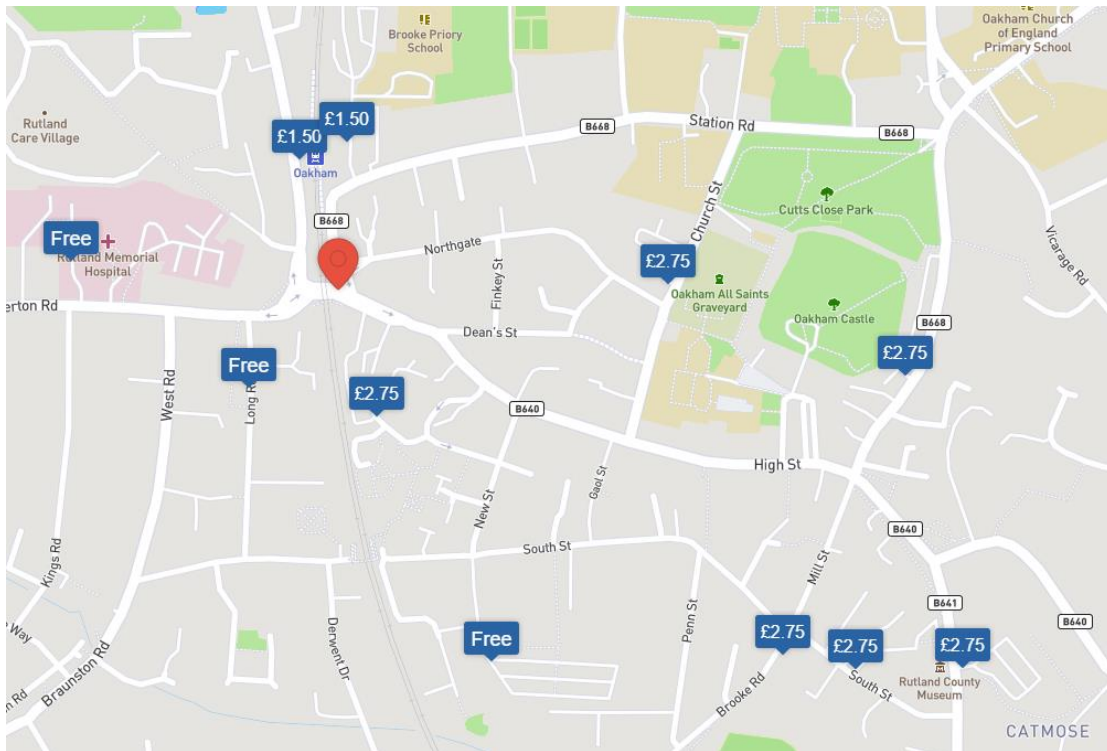
- Church Street benefits from reasonably good levels of footfall on account of the presence of Costa and QD Stores. As the principle location for household / discount goods in the town centre, the latter store can be considered an important retailer and town centre anchor in its own right. It is understood that the Costa store will be closing in September 2023; the reasons for this are unknown.
- Mill Street continues to perform a role and function of a secondary shopping street. This is largely on account of the more boutique / specialist nature of the retail offer in this part of the town centre, with predominantly comprises fairly high-end / specialist retailers and galleries, together with restaurants and takeaways which are likely to attract more evening footfall. However, the opening of a number of new daytime food & drink operators particularly at the northern end of the street is assisting in attracting footfall.
- Goal Street — which provides the key linkage between the High Street and Tesco — was noted to only have moderate levels of footfall, and there may be merit in seeking an improvement to the visual appearance of this important thoroughfare to help drive footfall; this is discussed further below.
- The West End of the town centre has historically also had lower levels of footfall, particularly beyond the Wilko store / bus station towards the railway station, and this continues to remain the case. This is not considered to be a particular cause for concern, more just a reflection of the fact that there are no particular footfall attractors in this part of the town centre.

Accessibility

- 5.28 The household survey results identified that, for those respondents who stated they visit Oakham town centre:
- 73.44% travel by car (as the driver) and a further 8.25% by car (as the passenger).
 - 14.29% walk into the town centre
 - Public transport usage is low – only 2.27% access by bus.
 - Cycling usage is surprisingly low – only one survey respondent stated they access the town centre by cycle.
- 5.29 Oakham town centre can be considered to benefit from good levels of accessibility. The town centre is served by a number of car parks around its periphery, the majority of which are operated by Rutland Council, with a parking rate of £2.75 for a 3-hour stay (correct as of June 2023). There is cheaper parking (£1.50/2hrs) at Oakham railway station, and the town centre Tesco store offers free parking. At Council operated car parks, parking for under 30 minutes is free. There may be scope for this free parking period to be extended, say for up to 2 hours, which may assist in encouraging residents and visitors to spend longer in the town centre, and support complementary facilities such as its emerging café scene, for example.
- 5.30 Whilst we have not undertaken any formal audit of car parking capacity as part of our assessment, we did not observe instances of queues for car parking at the time of our visit to the centre. The Tesco car park was however observed to be at capacity, even at a relatively off-peak time (a weekday morning).

- 5.31 Oakham's location off the A606 (which connections Nottingham, Melton Mowbray, Oakham and Stamford) means the town centre has the potential to benefit from passing longer-distance visitor trips, with the bypass also having the benefit of removing longer-distance traffic from travelling through the town centre itself.

Figure 5.6 Car parking provision in Oakham town centre



Source: Parkopedia website, June 2023. Prices shown are for three hours parking.

- 5.32 Oakham rail station sits on the western edge of the town centre and is served by hourly services operated by CrossCountry westwards to Melton Mowbray, Leicester and Birmingham; and eastwards to Stamford, Peterborough, Cambridge and Stansted Airport. Oakham also has one direct train to Corby and Kettering in the weekday peak, operated by East Midlands Railway, to connect with services to London St Pancras. Outside of this, connections to London necessitate a change at either Leicester or Peterborough, and the Council should work with Network Rail and train operating companies to ensure improved connections in this respect, which would likely benefit Oakham and the wider County's visitor economy.
- 5.33 Bus services operate from John Street Bus Station, to the rear of the Wilko store in the town centre. The town is only served by a handful of bus routes; the R1 provides several services a day to Melton Mowbray, Uppingham and Corby; and the R2 'Rutland Flyer' provides connections to Melton Mowbray via Market Overton, also running several services a day. The 'Oakham Hopper' services provides six services a day connecting residential areas of the town with the town centre. An aspiration of the Council should be to seek a more regular level of services across these three routes, enabling them to run at consistent hourly intervals, rather than the slightly more sporadic nature to which they currently operate. In addition to these services, there are more limited bus connections to Stamford. Surprisingly, there are no frequent bus connections to Leicester.

- 5.34 Pedestrian footpaths throughout the town centre generally appear in good condition, whilst narrow in some cases which is largely owing to the historic fabric of the town centre. Better pedestrian crossing provision is needed at the bottom of Station Road, which is a relatively wide road that is well used by vehicular traffic accessing the railway station car park, and pedestrians walking into the town centre from the western side of the town centre / railway station. There is currently no sufficient pedestrian refuge in the centre of the road, which is considered would be beneficial particularly as a second road, Northgate, also leads into the junction. Enhanced pedestrian crossing / priority measures at this location would also help direct visitors more clearly towards the town centre.

Figure 5.7 Recommended location for improved crossing provision, Melton Road



Perception of safety and occurrence of crime

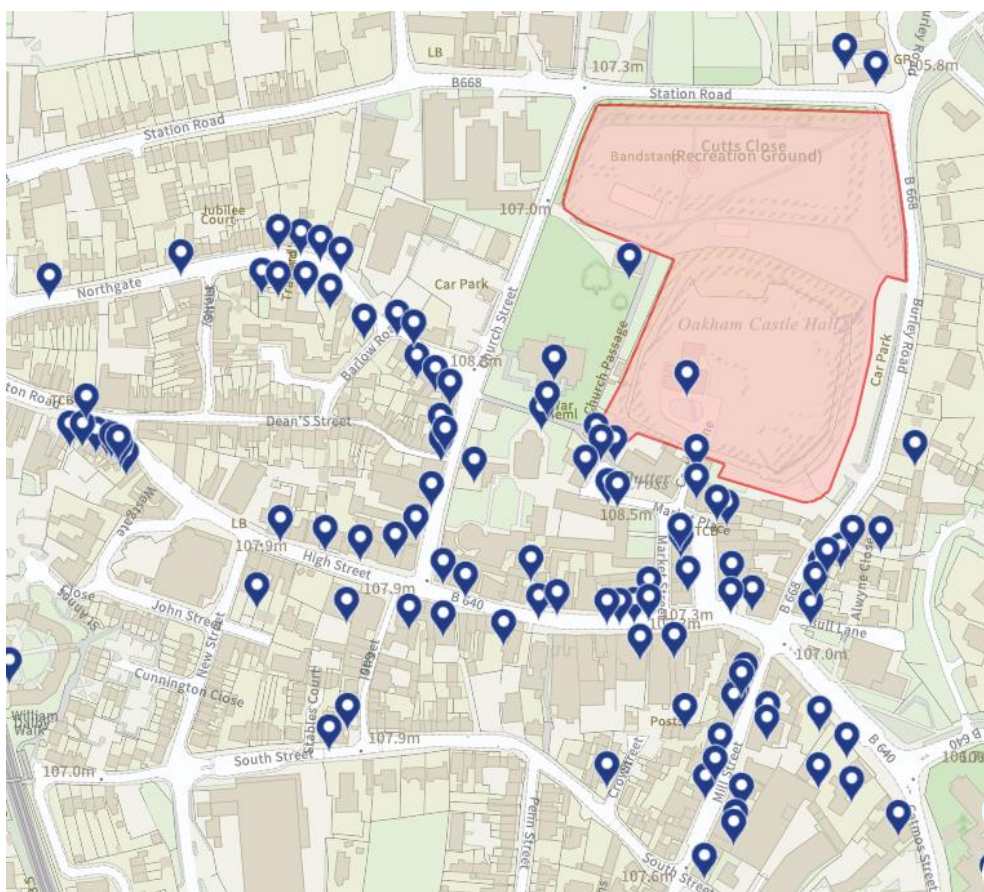
- 5.35 At the time of our visit (weekday daytime), Oakham town centre felt a safe and pleasant environment. No observations of antisocial behaviour were identified, and nor was there evidence of graffiti, criminal damage or similar in the centre.
- 5.36 From reviewing recent data published by Leicestershire Police, the town centre does not appear to benefit from noticeably high levels of crime: In March 2023 (the most recent month for which data is available), 20 crimes were reported in/around the town centre, mostly related to antisocial behaviour and shoplifting; In February 2023, the number of reported crimes was also 20; and in January 2023 and December 2022, the number of reported crimes was lower still, at 9 and 8 incidents respectively.

State of town centre environmental quality

- 5.37 Oakham continues to benefit from a generally positive environmental quality, although there remains scope for peripheral areas of the town centre – particularly the West End – to be improved in terms of interventions such as improving the quality of the paving. There is also a need to soften the appearance of Gaol Street to make this a more inviting thoroughfare between the High Street and Tesco store – there is potential to make significantly more of this asset as one of the town centre's few pedestrianised areas, than is currently offered. This opportunity was also identified in the 2016 Study.

- 5.38 As noted above the town centre does have a number of prominent vacant units and a solution should be explored for improving the visual appearance of these whilst a new tenant is sought, in order to minimise the negative visual impression they create. The Council would need to work with landowners and other relevant bodies to encourage this.
- 5.39 The town centre also continues to be adversely impacted in terms of environmental quality by the steady stream of vehicular traffic running through the centre, generating background noise and detracting from the overall positive visual appearance of the centre. Whilst this is regrettable, as previous sections of this health check analysis have identified, over 80% of users of the town centre access it by car, and therefore whilst this is unfortunate for the overall environmental quality of the centre, it would appear the overall turnover and usage of the town centre may be impacted were these car trips to be reduced or diverted away from the High Street.
- 5.40 The town centre contains a wealth of listed buildings, as shown in the Historic England extract below at **Figure 5.8**. In addition, Oakham Castle and its grounds are a Scheduled Monument. These listed buildings make an active contribution to the overall positive visual appearance of the town centre and its attractive and historic setting positively impact on its overall vitality and viability.

Figure 5.8 Heritage assets in Oakham town centre



Source: Historic England

Section 6

Uppingham town centre health check

- 6.1 In this section we set out a review of the vitality and viability of Uppingham town centre, which follows the same format as the assessment for Oakham set out in the previous section.

Diversity of uses

- 6.2 **Table 6.1** shows the current diversity of uses of Uppingham town centre, based on Experian's 'Category Report' (February 2023).

Table 6.1 Diversity of uses, Uppingham town centre

Goods category	Number of outlets	% of total	UK average % (Feb 2023)	Difference to UK average %
Comparison goods	41	41.8%	26.8%	+15.0%
Convenience goods	11	11.2%	9.3%	+1.9%
Retail services	18	18.4%	15.8%	+2.6%
Other retail	0	0%	0.1%	-0.1%
Leisure services	14	14.3%	25.5%	-11.2%
Financial & business services	4	4.1%	8.7%	-4.6%
Vacant	10	10.2%	13.8%	-3.6%
TOTAL	98	100%	100%	-

Source: Experian Category Report, February 2023

- 6.3 Table 6.1 shows:
- Uppingham town centre is a small town centre — there are under 100 units in the centre.
 - The comparison goods function of the town centre is particularly strong, accounting for 41.8% of units in the centre, 15.0% above the UK average. The comparison goods representation is clearly very high in the context of the size of the centre, largely driven by the number of art galleries / showrooms in the town centre (8 in total) and antiques shops (4 in total). There are also a high number of craft / gift shops relative to the size of the centre (5 in total).
 - The above therefore points to Uppingham have a comparison goods shopping function which is more orientated towards specialist shopping, rather than day to day comparison goods shopping. This is consistent with trends identified in previous studies which have noted the role of art dealers and antique shops in the town centre. These assist with provide Uppingham with a niche / specialist offer which means it is likely to attract visitors from a catchment that extends beyond the immediate local area and can help put the town centre 'on the map'.

- Given the above, it is surprising to note that the proportion of leisure services (which includes cafes, bars, restaurants, pubs, hotels, take-aways and sports facilities) is noticeably under-represented, accounting for 14 units in the centre, equivalent to 14.3% of all units, which is 11.2% below the current UK average. This would indicate that whilst the specialist draw of some of the town centre retailers may be significant, there is only limited provision of facilities to support these, particularly coffee shops and evening economy uses such as pubs and restaurants.
- The convenience goods retail function of the centre is strong, with above average representation compared to the current UK average. A key positive of the offer of the town centre in this respect is the number of specialist convenience goods retailers — the centre includes a baker, two butchers and two health foods stores for example. The small Co-Op foodstore to the north of the town centre continues to act as the ‘anchor’ to the overall offer of the town centre.
- Retail services account for 18.4% of units in the centre, equivalent to 18 units. However, it is apparent that this offer is predominantly accounted for by the health & beauty sector (hairdressers, beauty salons and so on), which account for 13 of the 18 units occupied by retail services, which can be considered a relatively high amount in the context of the relatively small size of the centre. Other retail services in the centre include an opticians and a post office; the main qualitative gaps are the lack of a travel agent and a dry cleaners / laundrette.
- Financial services account for 4.1% of units in the centre, equivalent to 4 units. All of the four units are occupied by estate agents / property services. This is no bank or building society in the town centre, although the absence of these facilities in smaller town centres is no longer uncommon.
- Vacant units are considered separately below.

Proportion of vacant street level property

- 6.4 The Experian Category Report (February 2023) identified a vacancy rate for the town centre of 10.2%, equivalent to 10 vacant units. The vacancy rate is 3.6% below the current UK average of 13.8%, which can be considered a positive reflection on the vitality of the centre in the context of the current economic circumstances, although offers scope for improvement. The current vacancy rate is higher than the vacancy rate of 6.7% identified in the 2016 Study, although given the small size of the centre the change in vacancy rates is equivalent to only a handful of additional vacant units.
- 6.5 The location of the vacant units in Uppingham town centre (as of February 2023) is shown in **Figure 6.2**. This shows small concentrations of vacant units along the southern side of High Street East, together with two larger vacant units — the former Royal Oak pub on Queen Street, and a vacant unit on the Market Place.

Figure 6.2 Vacant units in Uppingham town centre, February 2023



Source: Experian Goad

- 6.6 From our visit to the town centre in May 2023, we noted that two of the units on High Street East identified as vacant in the Experian survey have been subsequently let; one to an estate agent and a second to 'The Uppingham Cellar', a wine and bottle shop. This has the effect of reducing the vacancy rate down to 8.2%.
- 6.7 The vacancy rate does not, in itself, present us with significant cause for concern, particularly most of the vacant units are relatively peripheral within the centre and do not significantly detract from the overall feel of the centre or visually have an overly negative impact. The adjusted vacancy rate of 8.2% is also significantly below the current UK average of 13.8%. Nevertheless, it is recommended that the vacancy rate is monitored in the town centre, particularly given the challenging conditions which businesses and town centres are currently facing which can mean vacancy levels can change quickly.

Customers' experience and behaviour

- 6.8 As set out in the previous section, the household telephone survey undertaken in support of this study asked respondents on their usage of the County's town centres; the key findings in respect of Uppingham town centre are summarised below.

Frequency of visits

- 6.9 For residents who stated that they visit Uppingham town centre, the most popular frequency of visit was 'at least once a week' (24.93% of respondents), followed by 'at least two times a week' (16.35%). It is also interesting to note that a higher proportion of residents stated that they visit the town centre on a daily basis compared to Oakham, with 11.54% of respondents stating they visit the town centre daily; the equivalent figure for Oakham is 4.97%. The results indicate that the town centre plays an important role in meeting local day to day shopping needs. 15.17% of respondents identified that they only visit Uppingham town centre once a month.

Main purpose of visit

- 6.10 The most popular reasons for visiting Uppingham town centre were as follows:
- Undertaking non-food shopping (18.46% of respondents)
 - Undertaking food shopping (14.43% of respondents)
 - Visiting cafes/restaurants (12.24% of respondents)
 - Window shopping / browsing (10.05% of respondents)
 - Visiting friends / relatives (8.22% of respondents)
- 6.11 It is interesting to note that non-food shopping, rather than food shopping, is the primary reason for residents' visits to the town centre, a reverse of the trends identified in Oakham. It is also noteworthy that visiting cafes/ restaurants is a stronger driver of visits than is the case in Oakham.

Linked trips

- 6.12 In terms of what other activities / services they used when visiting the town centre, the most popular response by some margin was visiting cafes / restaurants (28.97%), indicating that these uses play an important role in driving footfall and spend to the centre even if they are not the primary reason for visiting for most residents. Behind this, non-food shopping was a linked activity for 19.26% of respondents, and food shopping was a linked activity for 16.71% of respondents. Other linked reasons for visits included window shopping / browsing (10.25% of respondents) and visiting friends & relatives (9.57% of respondents). 21.58% of respondents stated that they did not undertake any linked trips.

Likes and dislikes

- 6.13 Respondents who use Uppingham town centre were asked what they liked about the town centre, with the most popular response shown in **Table 6.3**. It can be seen that factors relating to the environmental quality of the centre and the atmosphere / feel of the centre score particularly strongly, with over one-third of respondents stating that they appreciate the atmosphere of the town centre. This tallies with the wider findings of our health check assessment which identify Uppingham town centre as benefiting from particularly strong environmental quality which is unquestionably a key contributor to its wider vitality and viability. Over one quarter of respondents also valued the fact the town centre was close to their home, indicating that the town centre benefits from a strong localised catchment.

Table 6.3 Most liked attributes of Uppingham town centre

Rank	Attribute about Uppingham town centre which respondents liked	% of responses*
1	Nice atmosphere / friendly people	33.49%
2	Close to home	26.18%
3	Environmental quality of the centre / attractive place	19.28%
4	Choice & range of shops	10.80%
5	Choice of leisure facilities (e.g. pubs, restaurants)	9.34%
6	Quiet / not too busy	8.52%
7	Compact / shops close together	7.61%
8	Choice of independent retailers	7.50%
9	Familiar / know where everything is	7.40%
10	Good market	5.18%

Source: Household survey results

- 6.14 The household survey also asked about factors which users of Uppingham town centre disliked. Positively, 57.99% of respondents stated that there was nothing they disliked about the town centre, thus indicating a very high level of satisfaction from users of the centre. The only factor which generated a significant number of responses was a perceived lack of car parking spaces (12.23%), whilst 5.40% of respondents considered the empty shops in the town centre to be the main thing they disliked about the town centre, and 5.25% the lack of choice/range of non-food shops. However, as can be seen, these responses attracted a relatively low proportion of responses.

Means of access

- 6.15 70.16% of respondents stated they access Uppingham town centre by car (as driver) (with a further 5.28% as a passenger in a car), and 18.67% on foot. Only 3.53% of respondents stated that they access the centre by public transport.

Dwell time

- 6.16 The majority of respondents only visit the town centre for a short period of time, with a total of 58.95% of respondents stating they visit the centre for under an hour (higher than the equivalent figure for Oakham of 52.95%). 88.83% of respondents remain in the centre for under two hours. Whilst these figures are largely a reflection of the limited size and offer of the town centre, there nevertheless is scope for this to be improved through an enhanced complementary leisure (particularly coffee / casual dining) offer, which would assist in encouraging residents and visitors to spend longer in the centre.

Table 6.4 Dwell time in Uppingham town centre

Time spent in Uppingham town centre	% of responses
1 - 10 minutes	2.54%
11 - 20 minutes	3.78%
21 - 30 minutes	14.60%

31 - 40 minutes	3.77%
41 - 50 minutes	2.58%
51 - 60 minutes	31.68%
61 to 90 minutes	10.93%
91 to 120 minutes	18.95%
More than 120 minutes	5.69%
(Don't know / varies)	4.35%
(Refused)	1.13%

Source: Household survey results

Retailer representation & balance between independent and multiple stores

- 6.17 Uppingham's retail offer continues to be orientated predominantly towards independent / specialist retailers, and indeed this is a key part in the overall attractiveness of the town centre as a destination. Experian's Category report identifies just 12 of the 98 units in the town centre to be operated by multiples (12.24%).
- 6.18 The small Co-op store to the northern side of the town centre on North Street East continues to form the 'anchor' store to the town centre, despite being off-pitch in relation to the rest of the retail offer. The store and its associated car park were both observed to be busy at the time of our visit to the centre. There are no other stores which we could consider to be 'anchor' stores, but it was observed that the food & drink retailers in the centre, particularly the coffee shops, were busy and well-used. Other national retailers present in the centre include a small branch of Boots on High Street East; a branch of Budgens associated with the petrol filling station on Ayston Road; and a One Stop convenience store on High Street West. Since the 2016 Study, Costa have occupied previously prominent vacant unit at the junction of High Street West and Orange Street, with a sensitive conversion of a historic property.
- 6.19 As noted above Uppingham has a good variety of independent retailers in the convenience goods sector, examples including Nelsons of Uppingham Butchers (High Street East), Baines Bakery (High Street West) and Uppingham Fine Foods (High Street East). In the comparison sector, the focus along Orange Street remains the specialist art galleries for which Uppingham has a long-standing association with, and these are supplemented with a number of specialist gift and homewares retailers elsewhere in the centre.
- 6.20 The retail offer overall can be considered upscale, interspersed with a number of more day-to-day retailers, and the presence of a number of charity shops along High Street East also assists with providing diversity.

Pedestrian flows

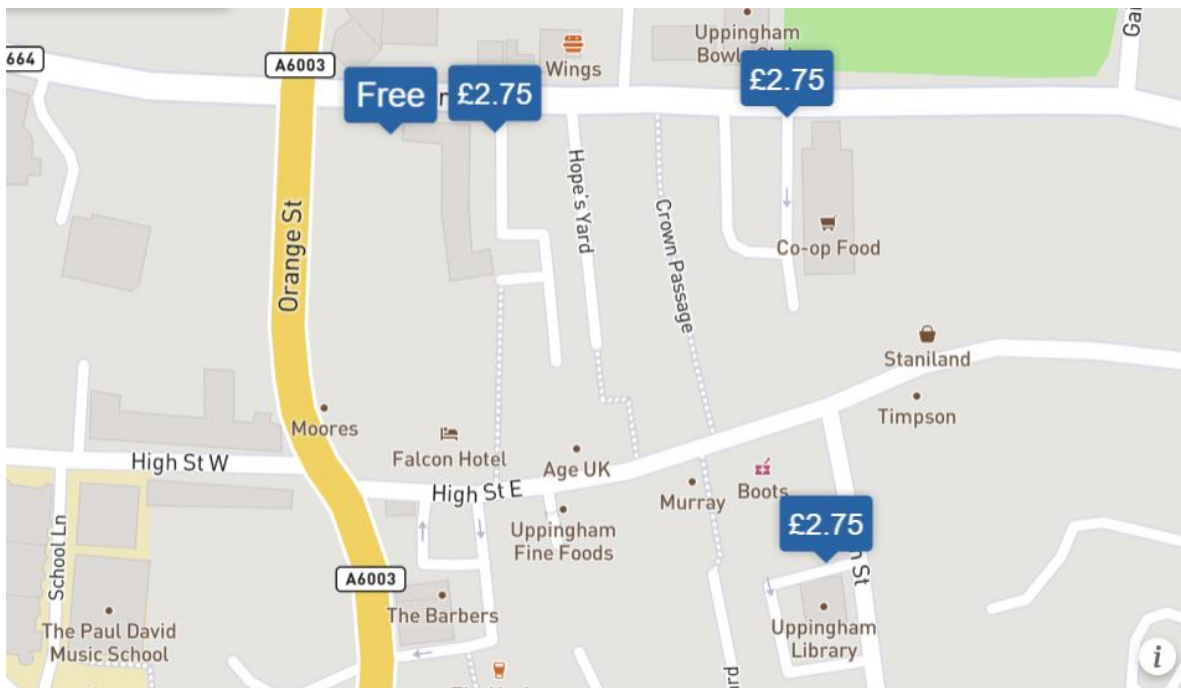
- 6.21 As with Oakham, no formal pedestrian flow counts were undertaken to inform this study, but from qualitative observations it was considered that the centre benefits from a good and steady level of footfall throughout what can be considered the core retail areas in the town centre – High Street East, Market Place and the eastern end of High Street West. The footfall in Market Place can be expected to be bolstered by the presence of the weekly market which takes place on Fridays.

- 6.22 As noted above it is the Co-Op store on North Street East which acts as the main driver of footfall in the town centre, largely by virtue of it being the largest supermarket serving Uppingham, and also adjacent to one of the three main town centre car parks. There are connections through to High Street East from the side of the Co-Op store, although these may not be immediately obvious to those unfamiliar with the centre.

Accessibility

- 6.23 The household survey results identify that, for those residents in the survey area who use Uppingham town centre, over three-quarters (75.44%) access the centre by car. A further 18.67% walk to the town centre, and 3.53% access by bus. None of the respondents stated that they cycle to the centre.
- 6.24 The town centre is served by two main surface parks, both of which are operated by Rutland County Council, with a free car parking for under 30 minutes, £1.10 for an hour's car parking, £2.75 for a three hour stay, and £5.30 for one day. The car parking rates reflect those of Oakham. In our assessment of Oakham in the previous section, we suggested that the Council may wish to consider extending the period of free car parking to help encourage residents and visitors to spend longer in the town centre during the daytime, and the same conclusion can be applied here, although the relatively limited parking provision in the centre may not such an approach feasible.
- 6.25 The two main car parks are both located on North Street East – Mercers Yard (40 spaces) and Yarn Market (46 spaces). Both are surface car parks, and both were observed to be well used at the time of our visit to the centre. Yarn Market car park is situated adjacent to the Co-Op store and therefore doubles up as a shopper car park. There is a further small surface park (10 spaces) adjacent to the library on Queen Street.

Figure 6.5 Car parking provision in Uppingham town centre



Source: Parkopedia website, June 2023. Prices shown are for three hours parking. Note – free parking annotation on North Street East is only for patrons of The Falcon Hotel.

- 6.26 Uppingham does not have a connection to the national rail network, with the nearest stations being in Oakham and Corby. The town centre is served by a number of bus services, which all stop on North Street East close to the Co-Op store. Service R1 provides six connections a day between Uppingham and Oakham, with services also extending northbound to Melton Mowbray and southbound to Corby. Service R4 provides a morning peak and evening return service to/from Peterborough, and service 747 provides a number of daily connections to Leicester via Houghton on the Hill, with services running approximately every two hours during the daytime. Uppingham is not served by any buses on Sundays.
- 6.27 In terms of pedestrian accessibility and movement around the centre, we did not identify any major areas of concern on our visit to the centre. As noted previously, there may be scope for improved wayfinding between High Street East and the car parks / Co-Op store to the north.

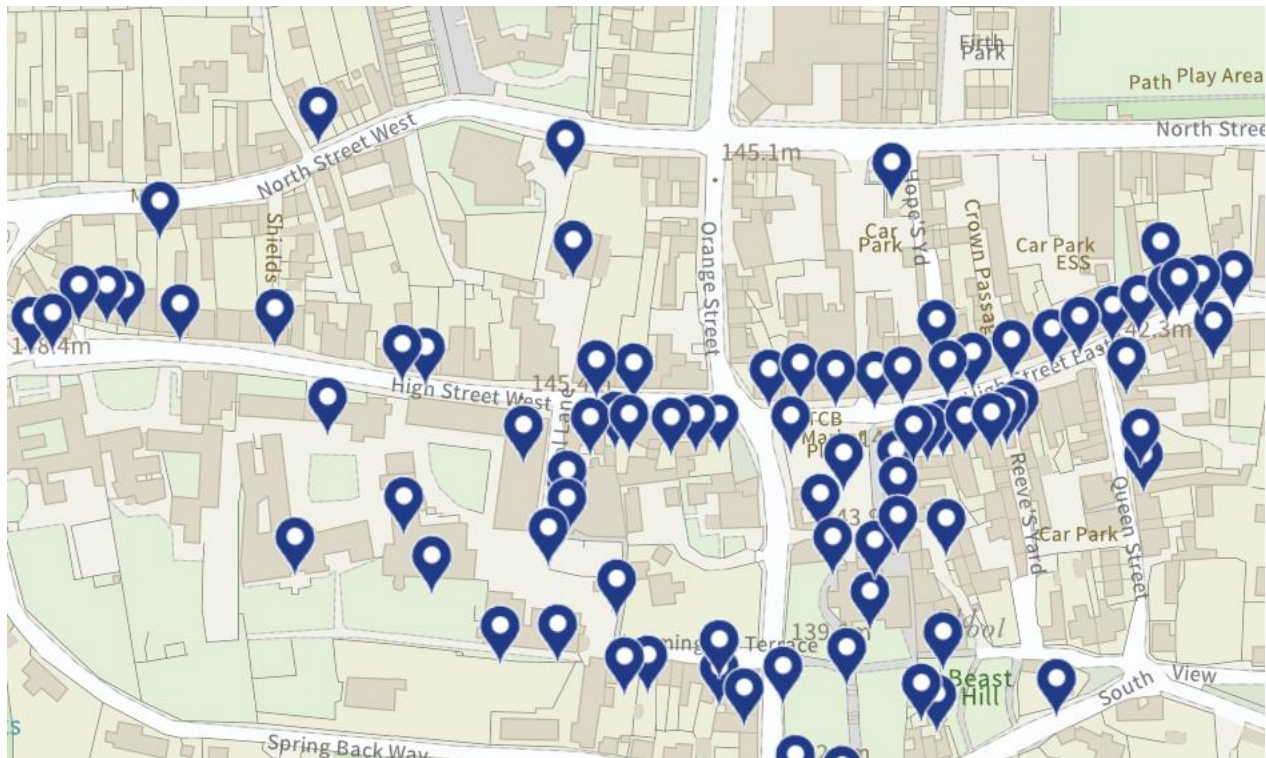
Perception of safety & occurrence of crime

- 6.28 At the time of our visit to Uppingham town centre (weekday daytime), the centre felt a very safe environment. The compact, historic nature of the centre affords good levels of natural surveillance. We did not identify any issues in respect of anti social behaviour, criminal damage or graffiti in the centre.
- 6.29 Leicestershire Police crime data identifies that the town centre has low levels of crime. In March 2023, a total of nine incidents were reported in the town centre area, four of which were theft incidents at the BP garage at Ayston Road. In February 2023 there were five incidents reported, and in January 2023 just three incidents. These can be considered low crime levels and not a particular matter for concern in the context of impacting the vitality and viability of the town centre.

State of town centre environmental quality

- 6.30 Uppingham is a historic town centre and largely maintains an excellent standard of environmental quality. The historic nature of the town centre benefits its overall vitality and viability and is likely to be an attractor in its own right. There are a wealth of listed buildings within the town centre, including virtually every building along the northern side of High Street East between its junction with Orange Street, and the Uppingham Town Council offices at the eastern of the town centre. The presence of Uppingham School at the western end of the centre further enhances its overall quality.
- 6.31 The BP petrol filling station and adjacent Yamaha dealership at the Ayston Road / North Street East junction are the only buildings of note which can be considered to negatively impact on the wider setting of the centre.
- 6.32 The retail and commercial units in the town centre are generally of good quality and well-maintained. Shopfronts are typically painted in a muted colour palette and are appropriate to their setting, with no noticeable example of particularly bright or intrusive signage.

Figure 6.6 Heritage assets in Uppingham town centre



Source: Historic England

Extent of evening economy

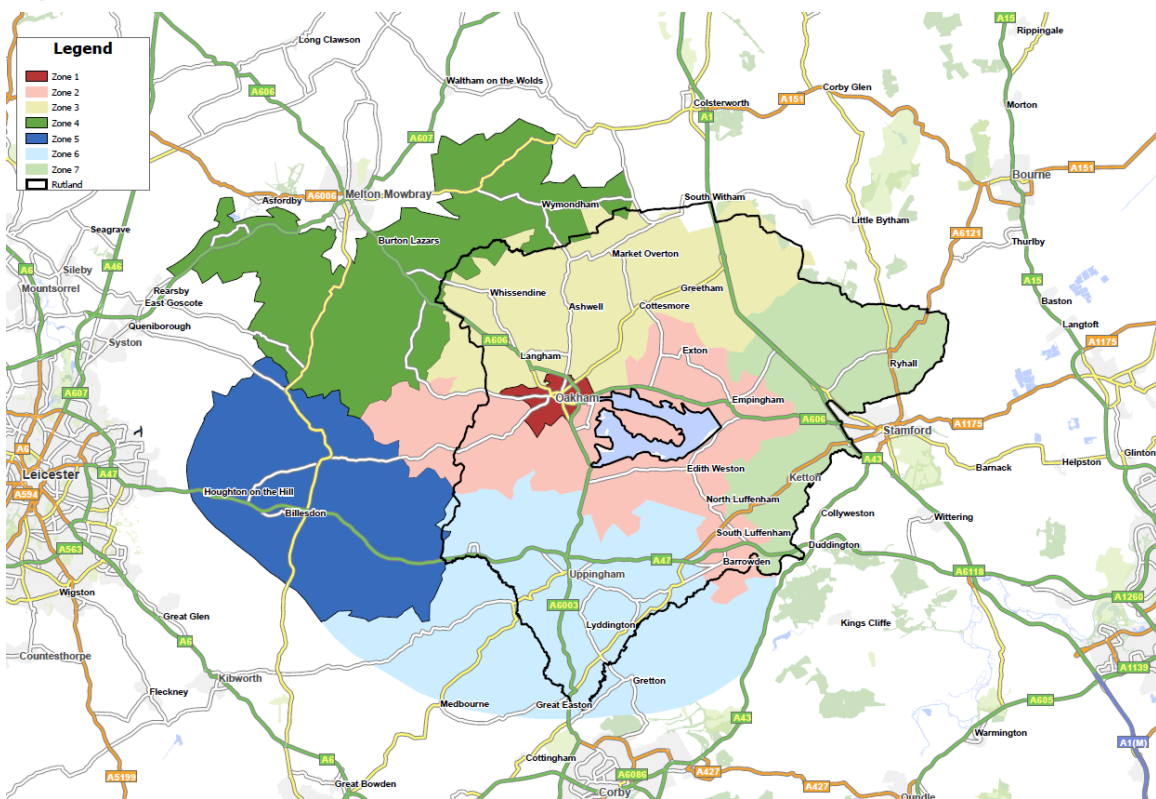
- 6.33 For its size, Uppingham can be considered to have a good evening economy, boosted by the presence of a number of upmarket hotels and restaurants in the centre. Independent restaurants such as No.23 and Don Paddy's are upmarket brasserie-type restaurants which are likely to be well-supported by the visitor economy as well as locals, and there are also a number of pubs such as The Vaults, The Crown and, at the western edge of the centre, The Exeter Arms. The former Royal Oak pub on Queen Street is understood to be currently vacant, but if brought back into reuse would further enhance the offer of the centre in this respect. In addition to the above, the centre also offers a number of take-aways.
- 6.36 In terms of retail uses, these do not typically with the evening economy uses, with most shops closing at the traditional hours of 5-5.30pm, and in some cases earlier; this is to be expected in a centre the size of Uppingham particularly given the focus towards independent retail. Positively however the Co-Op supermarket remains open until 10pm Mondays to Saturdays,, and the One Stop store on High Street West trades from 6am to 10pm every day of the week.
- 6.37 Overall, and particularly having regard to the size of the centre, we would consider Uppingham to benefit from a good level of evening economy activity which supports the wider vitality of the centre.

Section 7

Approach to household telephone survey

- 7.1 In this section, we set out an introduction to the household telephone survey of shopping patterns, which has been undertaken in support of this study. The household survey updates that which was undertaken in support of the 2016 Study in full. We have sought to retain the same overall survey area and sub-division into survey zones, in order to enable comparative analysis between the two sets of data to be undertaken.
- 7.2 The extent of the household survey area is shown in **Figure 7.1**, with the administrative boundary of Rutland denoted by the heavy black line, confirming that the entirety of the County forms part of the overall survey area. The survey area also extends beyond the administrative boundary of Rutland towards Leicester to the west, Melton Mowbray to the north and Corby to the south, to capture whether residents in these largely rural areas look towards centres in Rutland for their shopping and leisure needs.
- 7.3 Given the relatively small size of Rutland's town centres and the spatial location of competing shopping facilities outside the catchment (e.g. Leicester, Melton, Corby, Stamford and Peterborough), it is considered this overall catchment area is sufficient to ensure that the maximum extent of the shopping and leisure catchment of Rutland's town centres is captured.

Figure 7.1 Household survey area & zonal split



- 7.4 As can be seen from Figure 7.1, the overall survey area has been divided into seven different survey zones, in order to enable local patterns of shopping to be accurately captured across different parts of the survey area. Approximately one hundred telephone surveys were undertaken in each of the seven zones (700 in total). Respondents were contacted across a variety of days at the week and at different times, and respondents' key demographics (e.g. age bracket and gender) were recorded in order to ensure a robust sample of the local population was captured. All respondents surveyed were asked to confirm they were the principle shopper in the household.
- 7.5 The subdivision of the survey area into zones is as shown in **Table 7.1**, and reflected in the different-shaded areas on Figure 7.1. Patterns of shopping do not reflect local authority administrative boundaries and therefore, as noted above, the survey area also extends into neighbouring authority areas. The numbering and extent of the survey zone boundaries has been kept consistent with those in the 2016 Study (and the 2011 Study prior to that). As stated above, there has been no change to the boundaries of the survey zones from those adopted in the 2016 Study.
- 7.6 Oakham town centre falls within survey zone 1, and Uppingham town centre falls within survey zone 6.

Table 7.1 Household survey zonal splits

Zone no.	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Zone name	Oakham	Central Rutland	North Rutland	S of Melton	E of Leicester	Uppingham & S Rutland	East Rutland
Postcode sectors	LE15_6	LE15_8	LE15_7	LE14_2	LE7_9 (part)	LE15_9 (part), LE16_7 (part), LE16_8 (part), NN17_3 (part)	PE9_3 (part), PE9_4 (part)

Source: Table CM1, Appendix 1 / Table CV1, Appendix 2

- 7.7 The household telephone survey results identify the shopping patterns of residents in the survey, for comparison (non-food) goods and convenience (food) goods, as well as patterns of commercial leisure visits. For comparison goods, questions were asked about shopping patterns for the following types of goods:
- Clothing & footwear;
 - Furniture, carpets or soft household furnishings;
 - DIY or decorating goods;
 - Electrical items e.g. televisions, washing machines & computers;
 - Health, beauty & chemist items;
 - Recreational goods e.g. sports equipment, bicycles, musical instruments & toys;
 - Other non-food items, e.g. books, CDs, vinyl, DVDs, Blu-Ray, jewellery, china & glass items.
- 7.8 A 'composite' set of shopping patterns was then produced, weighted by the average distribution of expenditure on each of these goods categories across the survey area, as identified by Experian. It

is this 'composite' analysis which forms the basis of the analysis in this section and have in turn been used to inform the quantitative forecasts of comparison goods need which are set out in the following section.

- 7.9 For convenience goods, questions were asked on patterns of visits for 'main' food shopping (i.e. weekly/ bulk food shopping trips), 'top up' food shopping (basket/small but frequent purchases) and 'small shops' (visiting specialist local retailers). Again, a 'composite' version of these three sets of results was prepared and used as the basis of the discussion in this section of the report and subsequent quantitative analysis.
- 7.10 The format of the survey largely follows that used for the 2016 Study in terms of structure and the range of questions asked. In addition to the questions on shopping patterns, questions were also asked in respect of whether respondents' shopping patterns had changed as a consequence of the Covid-19 pandemic, and for those respondents who identify that they visit Oakham and Uppingham town centres, what they like and dislike about the centre. The findings of these questions have been discussed separately in preceding sections of this report.

Section 8

Comparison goods shopping patterns & identification of need

- 8.1 In this section we introduce the key inputs which form the basis of our assessment of the quantitative 'need' for new comparison goods retail floorspace in the Borough, updating those identified in the 2016 Study. We then go on to forecast the quantum of comparison goods floorspace which the Council should seek to plan for over the new Local Plan period. An equivalent assessment for convenience goods floorspace is undertaken in the following section.
- 8.2 The calculation of 'need' is a technical exercise which is derived from considering three key factors: where residents of the survey area are currently undertaking their shopping; how much population growth is expected to come forward in the survey area; and how much spending on convenience and comparison goods will increase, having regard to economic forecasts and other factors such as online shopping. We introduce these inputs in full below. The findings of this section should be considered alongside the retail capacity tabulations for comparison goods floorspace at **Appendix 1**.
- 8.3 The retail capacity forecasts set out in this section cover the whole of the Council's new Local Plan Update period to 2041. However it is advised that figures beyond the next ten years are only considered indicative and should be subject to further review and updating during the course of the Plan period. This is because both economic circumstances and retail trends can change rapidly therefore longer-term forecasts of expenditure growth are more difficult to predict.

CALCULATION OF QUANTITATIVE NEED

- 8.4 The 'need' for new floorspace is calculated through a conventional and widely-accepted step-by-step methodology, consistent with best practice, which draws upon the findings of the household telephone survey of shopping patterns (as previously discussed) to model the current flows of expenditure (i.e. spending in £m) to each retail destination within the survey area, and those competing centres in the surrounding area. The 'need' figures presented relate to those for the Rutland County area only – i.e. they do not include the need for floorspace generated by other centres which fall within the household survey area (although given the rural nature of the surrounding catchment, there are no other centres within the survey area which would be expected to generate a significant retail turnover).
- 8.5 The first stage in this exercise is establishing the 'baseline' position, which is developed as follows:
- **Step 1:** Calculate the total population (Step 1a) and amount of convenience and comparison goods expenditure (Step 1b) which is available within the postcode sectors comprising the main centres' catchment areas (the 'survey area');
 - **Step 2:** Allocate the available expenditure to the convenience and comparison goods shopping destinations visited by residents within these postcode sectors, as defined by the household telephone survey of shopping patterns;
 - **Step 3:** Compare the total expenditure attracted to each shopping destination with the current retail floorspace to assess 'sales densities' (i.e. turnover per sq.m) in each shopping destination.

- 8.6 The above methodology is applicable to both the comparison goods and convenience goods needs assessments set out in this section and the following section respectively.

Step 1 — Population and Expenditure Growth

Survey area definition

- 8.7 The rationale behind the definition of the survey area is set out in the previous section. The survey area seeks to capture the maximum extent of the shopper catchment of Rutland's defined town centres, whilst also ensuring that the geographical extent of the County is captured in full.

Calculation of total population (Step 1a)

- 8.8 For the purposes of our 'baseline' needs assessment, we have utilised population forecasts provided by Experian. These are provided bespoke for each of the seven survey zones and are past trends-based population forecasts, and it is important to caveat that they are not 'policy forward', so may not fully reflect any planned levels of growth which may result in a level of population growth over and above that which has historically come forward.
- 8.9 Experian's population projections are produced using a 'demographic component model' which is based on a combination of Experian current age and gender estimates, and Government population projections by age/ gender bands at the Local Authority District level. The 'demographic component model' uses Experian 2021 mid-year age and gender estimates as a base, and projects these forward on a year-by-year basis over the desired period (in the case of this study, up to 2041). The Experian model takes into account the following yearly components of population change in their projections, with the resulting rates of population change sense checked against Government/ONS population projections:
- Birth rate (applicable in the 0-4 age band);
 - Ageing (population received from preceding age band);
 - Ageing (population lost to succeeding age band);
 - Net migration (by age band)
 - Death rate (by age band)
- 8.10 Using GIS modelling, Experian are then able to apply these projections to a bespoke geographic area — in this case to mirror the boundaries of the household survey zones which combine to make up the survey area. Experian's population estimates and projections for the survey area are shown in Table CM2 (Appendix 1)/ Table CV2 (Appendix 2), and are summarised in **Table 8.1**. This shows that between 2021 (the base year for which Experian population data is available) and 2041 (the end of the Council's new Local Plan period), the population of the survey area is expected to increase by 5,574 persons.

Table 8.1 Forecast population growth in survey area, 2021-41

Base / interval year	2021	2026	2031	2036	2041	Change 2021-31	Change 2021-41
Population projection	55,380*	57,652	59,383	60,729	62,053	+3,721	+5,574

Source: Experian Micromarketer, 2023 Note: (*) denotes actual population; all other forecasts are projections / estimates.

Available expenditure in the survey area (Step 1b)

- 8.11 Experian identify a 'per capita' spend (spend per head) on comparison goods for each of the seven survey zones. These per capita figures are shown in Table CM3 of Appendix 1. This shows that per capita spend on comparison goods ranges from £4,298 per person in zone 1 (Oakham) to £4,864 per person in zone 5 (East of Leicester) at the base year of the expenditure data (2021). The average per capita comparison spend is £4,573 To put this into context, the UK average spend per head on comparison goods (at 2021) was £3,803; the per capita expenditure across each of the seven zones sits above this figure, confirming that the survey area is, overall, an affluent one.
- 8.12 Per capita spend does not typically remain static and is influenced by some of the wider economic factors which this study has previously identified. Experian produce guidance in their 'Retail Planner Briefing Note' releases on the extent to which per capita spend on goods categories may change over time. The most recent guidance in this respect is set out in Experian Retail Planner Briefing Note 20 ('EPR20'), published in February 2023. This forecasts that for comparison goods, per capita spend will decrease in the next two years (reflecting the wider constraints on growth and cost of living crisis as previous sections of this report have identified) by -0.4% (2022-23) and -1.6% (2023-24), with modest growth of +0.3% between 2024-25 before a return to higher levels of growth (+2.5% per annum) between 2025 and 2029. The levels of expenditure growth forecast are lower than have been forecast by Experian in previous recent iterations of the Retail Planner Briefing Note, reflecting the more subdued economic circumstances over the last 12-18 months.
- 8.13 It is necessary to make an adjustment to the Experian per capita spend figures to allow for non-store methods of shopping, known as 'Special Forms of Trading' (SFT) to be removed from the retail capacity forecasts. This is because the forecasts only seek to provide of the amount of physical 'bricks and mortar' floorspace which the Council needs to plan for, and therefore spending directed towards to other forms of shopping — principally online shopping — needs to be removed.
- 8.14 This exercise is undertaken in Table CM4 of Appendix 1. The proportion of total spend which has been deducted is derived from the household survey results, and is then adjusted for future years in line with rates of UK average SFT growth based on forecasts set out in RP20. The deductions applied are summarised for ease of reference in **Table 8.2**.
- 8.15 The household survey results indicate that online comparison goods shopping rates in the survey area are very significantly higher than the UK average, accounting for 41.9% of all comparison goods spend in 2022, compared to a current UK average of 26.5%; in other words levels of online shopping take-up for comparison goods are almost one-third higher than the UK average in the survey area. By applying Experian's UK average SFT growth rates to this figure of 41.9%, it means

that by the end of the study period at 2040, SFT could account for up to 47.7% of total comparison goods spend, i.e. approaching nearly 50% of total available spending on comparison goods. We have applied these 'adjusted' SFT forecasts (see **Table 8.2**) to our quantitative needs assessment.

Table 8.2 Comparison goods SFT discounts applied

	2023 (Study base year)	2026 (Interval year)	2031 (Interval year)	2036 (Interval year)	2041 (Interval year)
UK average - Experian Retail Planner 20 (Feb 2023)	26.5%	28.6%	30.6%	31.7%	32.3%
Change from previous interval period	-	+2.1%	+2.0%	+1.1%	+0.6%
Survey area average with growth in SFT from ERP applied	41.9%	44.0%	46.0%	47.1%	47.7%

Source: Experian Retail Planner Briefing Note 20 & household survey results

- 8.16 By applying the population forecasts to the per capita expenditure (with the adjustments for SFT applied), we can establish the total amount of 'physical retail' spending which is currently available to residents of the survey area, and how much this is expected to increase over the course of the study period to 2040. This exercise is also set out in Table CM4 (with growth between interval years summarised in Table CM5) of Appendix 1 and shows that total comparison goods spending in the survey area, once SFT is removed, is currently (2023) £157.1m. This is expected to increase to £178.2m in 2031 (+£21.1m).

Shopping patterns in the survey area (Step 2)

- 8.17 The household telephone survey results allow us to see the proportion of total available spend which is retained within the survey area (known as its 'retention rate'), and the proportion which is spent in locations further afield (often referred to as 'leakage'). This indicator is a good reflection of both the strength of the retail offer of town centres and other retail destinations in a survey area, and also can be expected to take into account other factors such as accessibility and quality of experience for users of the centres.
- 8.18 The total comparison goods market share which each comparison goods shopping destination draws from the survey area is shown in the final column of **Table CM7b of Appendix 1**. It shows that 37.0% of available comparison goods spend is retained in the survey area, with the rest spent at locations outside the survey area, in locations such as Leicester and Peterborough. Of the 37.0% which is retained in the survey area, 31.5% is accounted for by locations in the main towns of

Oakham and Uppingham, and 5.4%⁶ is spent in small/local shops in other locations across the survey area.

- 8.19 In terms of overall comparison goods market share from the survey area, **Table 8.3** summarises the most popular locations for comparison goods shopping for residents in the survey area, covering locations both within and outside the survey area boundaries in order to build up an overall picture of comparison goods shopping patterns.

Table 8.3 Most popular destinations for comparison goods shopping in survey area

Rank	Centre / Retail destination	Comparison goods spend from survey area, 2023 (£m)	% of total available comparison goods spend
1	Oakham town centre	43.7	27.8%
2	Leicester (all locations)*	28.3	18.0%
3	Stamford (all locations)	16.8	10.7%
4	Corby (all locations)	14.6	9.3%
5	Peterborough (all locations)	11.4	7.3%
6	Melton Mowbray (all locations)	9.4	6.0%
7	Uppingham town centre	5.8	3.7%
8	Market Harborough (all locations)	3.8	2.4%
9	Grantham (all locations)	3.3	2.1%
10	Nottingham (all locations)	3.1	2.0%

Source: Table CM7b, Appendix 1. Note* - 'all locations' refers to all retail destinations within the listed urban area – i.e. town/city centres, retail parks, non-food floorspace in foodstores etc.

- 8.20 Table 8.3 shows that Oakham town centre is the most popular destination for comparison goods shopping across the survey area, accounting for 27.8% of all comparison goods spending, equivalent to £43.7m in monetary terms. Behind this, destinations in Leicester draw a combined total of 18.0% of comparison goods spending, followed by destinations in Stamford which draw a combined total of 10.7% of comparison goods spending. No other destination achieves more than 10% of the market share. Uppingham town centre draws 3.7% of total comparison goods spending from the survey area (equivalent to £5.8m in monetary terms), reflecting its more size and specialist comparison goods offer.
- 8.21 **Table 8.4** shows the most popular comparison goods shopping destinations at the zonal level, showing where residents in different parts of the survey area are travelling for their comparison goods shopping. Centres in Rutland are highlighted – a darker highlight indicates what we consider to be a 'dominant' market share (a market share of 30%) or more from any individual zone, and a lighter highlight identified what we consider to be a 'secondary' market share (a market share of between 0 and 30%).

⁶ Note that figures may not fully tally due to rounding

Table 8.4 Comparison goods shopping patterns by zone

Zone number	Zone name	Most popular comparison goods shopping destination	2 nd -most popular comparison goods shopping destination	3 rd -most popular comparison goods shopping destination
Zone 1	<i>Oakham</i>	Oakham town centre (41.9%)	Leicester (13.6%)	Peterborough (10.4%)
Zone 2	<i>Central Rutland</i>	Oakham town centre (30.6%)	Stamford (17.9%)	Leicester (11.3%)
Zone 3	<i>North Rutland</i>	Oakham town centre (55.1%)	Leicester (10.1%)	Melton Mowbray (6.9%)
Zone 4	<i>South of Melton</i>	Melton Mowbray (44.6%)	Leicester (22.0%)	Oakham town centre (13.1%)
Zone 5	<i>East of Leicester</i>	Leicester (73.7%)	Market Harb'gh (6.9%)	Oakham town centre (5.6%)
Zone 6	<i>Uppingham & South Rutland</i>	Corby (29.7%)	Uppingham (13.9%)	Leicester (13.3%)
Zone 7	<i>East Rutland</i>	Stamford (61.7%)	Peterborough (19.9%)	Grantham (2.3%)

Source: household survey results

- 8.22 Table 8.4 shows that Oakham town centre has a dominant influence over comparison goods shopping for residents in zones 1, 2 and 3, securing over 30% of the market share from residents in these zones, including accounting for over 50% of the market share from residents in zone 3. Accordingly, these three zones combined can be considered to represent Oakham's 'primary catchment area'. Oakham town centre also picks up smaller market shares from zone 4 and zone 5, but residents in these zones principally look towards Melton and Leicester respectively for their comparison goods shopping.
- 8.23 Reflecting its more limited offer, Uppingham does not feature prominently as a comparison goods shopping destination, and even from its local zone (zone 6) plays a secondary role, with more residents travelling to Corby. This can be considered to be a reflection of the more specialist / boutique nature of the retail offer in Uppingham, whereas Corby's offer is both more extensive and more mainstream.

Changes in comparison goods shopping patterns

- 8.24 **Table 8.5** provides a comparative analysis of how comparison goods shopping patterns have changed across the survey area as a whole relative to those identified in the 2016 Study. The most significant change to note is that Oakham town centre is now, when considering the survey area as a whole, the most popular destination for comparison goods shopping; at the time of the 2016 Study

it was second behind Leicester. Oakham town centre has increased the proportion of comparison goods spend it captures from the survey area from 19.1% to 27.8%, which can be considered highly positive and shows a quite significantly greater proportion of comparison goods spend is now being retained within the survey area.

- 8.25 The increased proportion of spend being directed towards Oakham means that the surrounding network of centres account for a lower proportion of comparison goods spend than was the case at the time of the 2016 Study (with the exception of Corby, which now accounts for 9.7% of total comparison goods spend, compared to 9.3% in the 2016 Study). Most noticeably, the proportion of spend which is attracted by Peterborough has almost halved, from 14.0% to 7.3%. It is possible that the closure of the John Lewis store in Peterborough city centre may have contributed the reduction in Peterborough's comparison goods market share.
- 8.26 As previously identified in the report, one of the most significant changes to take place in terms of shopping provision outside the survey area has been the opening of the extension to Fosse Park on the western outskirts of Leicester. Although this is located on the opposite side of the Leicester urban area from Rutland (which sits to the east of Leicester), it is relatively easily accessible by car via the A47 and A6. The improved retail offer at Fosse Park has had a noticeable impact on shopping patterns – at the time of the 2016 Study, of the 22.0% overall comparison goods spend captured by Leicester, 18.5% was accounted for by the city centre, and 1.4% by Fosse Park. The new household survey identifies that, of the 18.0% overall comparison goods spend captured by Leicester, the city centre accounts for just 8.0% and Fosse Park's claim has increased to 5.3%.
- 8.27 Whilst not shown in Table 8.5, the proportion of comparison goods spend which Uppingham town centre attracts from the survey area is virtually unchanged from that of the 2016 Study; as shown in Table 8.3 it currently accounts for 3.7% of available comparison goods spend; in the 2016 Study the equivalent figure was 3.4%.

Table 8.5 Changes in comparison goods shopping patterns in survey area from 2016 Study

	2016 Study	2023 Study
Most popular comparison goods shopping destination	Leicester (22.0%)	Oakham town centre (27.8%)
2nd-most popular comparison goods shopping destination	Oakham town centre (19.1%)	Leicester (18.0%)
3rd-most popular comparison goods shopping destination	Peterborough (14.0%)	Stamford (10.7%)
4th-most popular comparison goods shopping destination	Stamford (13.7%)	Corby (9.3%)
5th-most popular comparison goods shopping destination	Corby (9.7%)	Peterborough (7.3%)

Source: household survey results for 2016 & 2023 studies

- 8.28 In **Table 8.6** we look more closely at the comparison goods 'market share' captured by Oakham and Uppingham town centres from each of the seven survey zones. It can be seen that Oakham town centre has grown comparison goods market share from six of the seven survey zones relative to the position in the 2016 Study, most significant from zones 2 and 3 where it has gained comparison goods market share of 12.5 percentage points and 25.4 percentage points respectively.

- 8.29 Table 8.6 also shows that Uppingham's comparison goods market share from each of the survey zones has remained relatively static but subject to modest improvements from five of the seven survey zones, including a 1.9 percentage point uplift from zone 5 and 1.2 percentage point increase from its local zone, zone 6. This points to a slightly improved picture in terms of Uppingham's shopping catchment and can thus be considered positive.

Table 8.6 Changes in Oakham & Uppingham zonal comparison goods market shares from 2016 Study

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Oakham town centre							
2016	41.1%	16.5%	29.7%	12.0%	8.6%	8.8%	1.1%
2023	46.6%	29.0%	55.1%	13.1%	5.6%	13.3%	1.9%
Change	+5.5%	+12.5%	+25.4	+1.1	-3.0	+4.5%	+0.8%
Uppingham town centre							
2016	0.3%	1.4%	0.0%	0.2%	0.9%	15.1%	0.0%
2023	0.5%	1.7%	0.9%	0.1%	2.8%	13.9%	0.0%
Change	+0.2%	+0.3%	+0.9%	-0.1%	+1.9%	+1.2%	-

Source: household survey results for 2016 & 2023 studies

Assessment of trading performance (Step 3)

- 8.30 Table CM10 of Appendix 1 shows that, on aggregate, comparison goods floorspace in Rutland is trading at £4,268 per sq.m in 2023. This figure represents the combined trading performance of Oakham and Uppingham town centres, and non-food floorspace in foodstores both in town centres and in out of centre locations. There are no significant concentrations of out of centre comparison goods floorspace (i.e.. retail warehousing) within the County which attracts a significant market share in the household survey results.
- 8.31 The sales density performance is considered in line with what we would expect given that both centres' comparison goods offer is largely limited to smaller scale / specialist retailers rather than national multiple retailers operating from larger footplate stores, which typically tend to command a higher sales density. It is positive to note that, driven by the increased market share which has been attracted to Oakham from the survey area relative to the position at the time of the last study, the aggregate sales density of comparison goods floorspace in Rutland has increased from £3,069 per sq.m in the 2016 Study to the current figure of £4,268 sq.m, although direct comparisons between figures should be treated with caution due to differences in price base.

Other inputs into the quantitative need assessment

Sales efficiency

- 8.32 It is also necessary to factor in changes in respect of 'sales efficiencies'; this is the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs, such as rents, rates and service charges, by increasing their average sales densities. Sales efficiency rates are provided by Experian in RP20 and for comparison goods floorspace the following rates have been applied:

- 2023-24: -0.1%
- 2024-25: -0.4%
- 2025-29: +2.0% per annum
- 2029-40: +2.8% per annum

Floorspace data

- 8.33 The comparison goods floorspace data which we incorporate into our modelling has been drawn from a range of data sources, including Experian Goad, commercial property websites and the Council's own planning application records. Our floorspace assumptions for foodstores make allowance for a proportion of the sales area of the foodstore to be used for the sale of comparison goods (in supermarkets, this may include books, stationery, home entertainment, small electrical items, and so on).

Commitments

- 8.34 In calculating retail floorspace capacity, it is necessary to deduct 'commitments' for new comparison goods floorspace — this is comparison goods floorspace which has been permitted but was not trading at the time of the household telephone survey undertaken in support of this study. These commitments will thus act as a 'claim' on the future amount of comparison goods floorspace which needs to be planned for. However, from reviewing planning application monitoring data provided by RCC, we have not identified any commitments for new comparison goods floorspace which need to be modelled into the capacity assessment.

IDENTIFICATION OF COMPARISON GOODS CAPACITY

- 8.35 Having undertaken the assessment of shopping patterns and trading performance, we set out the quantum of comparison goods floorspace which the Council should seek to plan for over the period to 2041, summarised in **Table 8.7**. Capacity forecasts are presented for the County as a whole.
- 8.36 We have assumed that any new comparison goods floorspace would trade broadly in line with that of existing, with some allowances for improvements on account of modern floorspace generally being more 'efficient' in terms of turnover per sq.m. On this basis we have assumed that new comparison goods floorspace would trade at a base of £4,500 per sq.m at 2021, with these sales densities themselves improving in efficiency over the course of the Plan period. We consider these to represent appropriate sales densities to use having regard to the current trading performance of comparison goods floorspace in the Borough and typical levels of spend per head on comparison goods in the County identified by Experian.
- 8.37 It is reiterated that capacity forecasts become increasingly open to margins of error over time and should be refreshed over the Plan period, and on this basis forecasts beyond 2031 should be considered indicative.
- 8.38 The forecasts are based on a 'constant market share' approach, assuming that current patterns of comparison goods shopping (as identified by the household telephone survey) will remain unchanged over the course of the Plan period to 2041. We are, at the time of preparation of this study, aware of any major development proposals within or surrounding the survey area which

would indicate that these shopping patterns will materially change, although clearly that may change in the future.

Table 8.7 Estimated comparison goods floorspace need for Rutland, 2023-41

Interval year	2026	2031	2036*	2041*
Estimated comparison goods floorspace requirement (sq.m net, rounded)	-800	-700	-600	-400

*Source: Table CM10, Appendix 1. Figures are rounded to the nearest hundred. *Indicative figure only, should be subject to future review.*

- 8.40 Table 8.7 shows that there is no capacity to support additional comparison goods floorspace either in the County over the new Local Plan period, with a marginal oversupply of approximately -700 sq.m identified at 2031, indicatively reducing to -400 sq.m net by 2041. Whilst the overall comparison goods retention rate of the County has improved relative to the position in the 2016 Study, there will be insufficient growth in comparison goods spending over the Plan period (having stripped out the high forecast levels of spending directed to online shopping) to support additional floorspace in the County over the new Local Plan period.
- 8.41 However the lack of comparison goods capacity should not mean that the council imposes a moratorium on new comparison goods floorspace in the County, particularly in instances where proposals are of an appropriate scale and have potential to enhance the vitality and viability of the network of centres in the County. Applications should be considered on their merits and, where appropriate, compliance with the sequential and retail impact policy tests. Please refer to the Strategic Recommendations in **Section 11** of this report for further discussion of this.

Section 9

Convenience goods shopping patterns & identification of need

- 9.1 In this section we set out the quantitative need for convenience goods retail floorspace in the County, again updating the equivalent figures which are set out in the 2016 Study. The approach to the calculation of convenience goods need largely reflects that used to calculate comparison goods need, as set out in the previous section, and therefore we do not seek to repeat the methodology in detail. The analysis set out in this section should be read alongside the retail capacity tabulations for convenience goods at **Appendix 2**. In common with the comparison goods forecasts in the previous section, it is advised that longer-term forecasts (i.e. those beyond the next ten years) are considered indicative and should be subject to further review and update during the Plan period.

Survey area definition and population growth (Step 1a)

- 9.2 Please refer to the explanation in Section 8 of this report in respect of these matters.

Available expenditure in the survey area (Step 1b)

- 9.3 Experian identify a 'per capita' spend (spend per head) on convenience goods for each of the seven survey zones, which are shown in Table CV3 of Appendix 2. This shows that per capita spend on comparison goods ranges from £2,933 at 2021 (the base year of the Experian expenditure data) in zone 3 (North Rutland) to £3,412 at 2021 in zone 4 (South of Melton). The average per capita convenience goods spend across the survey area is £3,174 at 2021, which is above the UK average of £2,753 at 2021.
- 9.4 Experian advise that per capita spend on convenience goods will increase over the study period, although expenditure growth on convenience goods is significantly more limited than for comparison goods, with Experian forecasting a decline in per capita spending on convenience goods until 2025 before a modest annual increase in per capita spend of 0.1% per annum between 2025 and 2029, and 0.2% per annum between 2029 and 2040. It is reiterated that longer term growth rates beyond 2031 are considered indicative.
- 9.5 As with comparison goods shopping, it is necessary to make an adjustment to the baseline Experian figures to allow for SFT to be removed from the retail capacity forecast. This exercise is set out at **Table CV4 of Appendix 2**. The proportion of total spend which has been deducted is derived from the household survey results, and is then adjusted for future years in line with rates of UK average SFT growth based on forecasts set out in Experian's Retail Planner Briefing Note 20, as summarised in **Table 9.1**.
- 9.6 Online shopping for convenience goods has historically had lower levels of take-up than for comparison goods shopping, but the evidence from the household survey is that it now accounts for an average of 11.9% of total convenience goods spend across the survey area, with a peak of 16.2% in zone 6 (Uppingham & South Rutland. This survey area average of 11.9% is just over double the current UK average of 5.6% (as identified by RP20), indicating that online shopping for convenience goods acts as a greater claim on total spend across the survey area than across the UK as a whole. If Experian's UK average SFT growth rates are applied to the current survey area

figure of 11.9%, it means that by the end of the study period at 2040, SFT could account for up to 14.1% of total convenience goods spend. Therefore whilst growth in convenience goods SFT is clearly more muted than for comparison goods spending as discussed in the previous section, it will still account for a noteworthy 'claim' on spending throughout the Plan period.

Table 9.1 Convenience goods SFT adjustments

	2023 (Study base year)	2026 (Interval year)	2031 (Interval year)	2036 (Interval year)	2041 (Interval year)
UK average - Experian Retail Planner 20 (Feb 2023)	5.6%	6.4%	7.1%	7.5%	7.8%
Change from previous interval period	-	+0.8%	+0.7%	+0.4%	+0.3%
Survey area average with growth in SFT from ERP applied	11.9%	12.7%	13.4%	13.8%	14.1%

Source: Experian Retail Planner Briefing Note 20 & household survey results

- 9.7 By applying the population forecasts to the per capita expenditure (with the adjustments for SFT applied), we can establish the total amount of spending which is currently available to residents of the survey area, and how much this is expected to increase over the course of the study period to 2040. This exercise is also set out in Table CV4 (Appendix 2), with growth rates between interval years summarised in Table CV5 (Appendix 2). Table CV4 shows that, having made allowance for SFT, convenience goods spend in the survey area is currently (2023) £142.6m; this will increase to £145.1m by 2031 and indicatively £153.4m by 2041. Therefore growth in convenience goods spend in the survey area is expected to be relatively limited at just +£10.8m over the course of the survey period to 2041.

Shopping pattern in the survey area (Step 2)

- 9.8 Convenience goods shopping is a more localised activity – a type of shopping where residents are more likely to use the facilities close to their home, rather than actively seek to travel a longer distance to visit a particular store. Consequently, it means that catchments typically retain a greater proportion of convenience goods market share than for comparison goods.
- 9.10 The total convenience goods market share which each convenience goods shopping destination draws from the survey area is shown in the final column of **Table CV7a of Appendix 2**. Reflecting the discussion set out above, it shows that 54.6% of available convenience goods expenditure is retained within the survey area (known as the 'retention rate'). Whilst on paper this figure appears relatively low, it needs to be considered in the context of the fact that parts of the survey area are better related to foodstores which are located outside the boundaries of the survey area than those

within. For example, residents in zone 7 (west of Stamford) are much more closely related to foodstores in Stamford, which sits to the immediate east of the boundary of the zone, than any equivalent provision within the survey area (the nearest of which would be Oakham). On this basis the level of 'leakage' of expenditure which the survey results identify are not considered to represent a particular cause for concern.

- 9.11 Moreover, there has been a noticeable improvement in the convenience goods retention rate relative to the 2016 Study, where the equivalent figure was 41.7%. The retention of a higher proportion of spend is positive in terms of indicating an improvement in sustainability of food shopping patterns. It is likely that the improvement in retention rate has been driven by the additional foodstore provision which has come forward in Oakham, where new Aldi and Lidl stores have opened since the 2016 Study was completed.
- 9.12 Unlike for comparison goods shopping, there is relatively little merit in looking at aggregate shopping patterns across the survey as a whole, given the more localised nature of convenience goods shopping. Therefore, we focus our analysis on the shopping patterns of the individual survey zones; this exercise is set out in **Table 9.2**.

Table 9.2 Most popular convenience goods shopping destinations by zone

Zone number	Zone name	Most popular convenience goods shopping destination	2 nd -most popular convenience goods shopping destination	3 rd -most popular convenience goods shopping destination
Zone 1	<i>Oakham</i>	Tesco, Oakham (39.0%) [^]	Aldi, Oakham (22.6%)	Lidl, Oakham (14.4%)
Zone 2	<i>Central Rutland</i>	Tesco, Oakham (20.1%) [^]	Aldi, Oakham (15.3%)	Lidl, Oakham (7.4%)
Zone 3	<i>North Rutland</i>	Tesco, Oakham (28.6%) [^]	Aldi, Oakham (27.4%)	Lidl, Oakham (10.2%)
Zone 4	<i>South of Melton</i>	Tesco, Oakham (20.1%) [^]	Aldi, Oakham (14.4%)	Waitrose, Stamford (10.2%)
Zone 5	<i>East of Leicester</i>	Tesco Extra, Hamilton, Leicester (14.0%)	Waitrose, Market Harborough (5.6%) [^]	Tesco, Oakham (5.2%) [^]
Zone 6	<i>Uppingham & South Rutland</i>	Co-Op, Uppingham (18.2%) [^]	Asda, Corby (14.0%)	Aldi, Oakham (13.2%)
Zone 7	<i>East Rutland</i>	Morrisons, Stamford (37.2%)	Waitrose, Stamford (15.3%)	Lidl, Stamford (13.4%)

[^]denotes store within a defined town centre. Shaded entries denote stores within survey area.
Source: Table CV7a, Appendix 2.

- 9.13 Table 9.2 shows that stores in Oakham account for the three highest market shares from zones 1-3 inclusive, indicating high levels of sustainability of shopping patterns for residents in these zones. Foodstores in Oakham also capture strong market shares from zone 4, and more limited market share from zones 5 and 6, and overall therefore residents in all of the zones bar zone 7 look towards stores in Oakham to varying degrees for their convenience goods shopping.
- 9.14 For residents in zones 1-4 inclusive, the Tesco store in Oakham town centre is consistently the most popular destination for convenience goods shopping, attracting a particularly high market share of 39.0% from residents in zone 1, and market shares of between 20 and 30% from each of zones 2-4. The out of centre Aldi store draws the second-highest market share from each of these zones, and Lidl draws the third highest from each of zones 1-3. The market shares attracted to Lidl are consistently some way lower than those of Aldi, despite the similarities of the two stores' product offer, and it may be the case that the Aldi store's location on the bypass works in its favour.
- 9.15 In zones 5 and 7, the majority of residents look outside the survey area for their convenience goods shopping; as noted above, this is largely a reflection of facilities outside the survey area being more closely related to residents than those within. In zone 5, residents look towards foodstores on the eastern side of Leicester and also Market Harborough, whilst in zone 7 residents look towards stores in Stamford.
- 9.16 In zone 6, the Co-Op store in Uppingham attracts the highest market share (18.2%), but there is loss of convenience goods spend to stores in Corby and Oakham. Whilst the boundaries of the survey zone do mean that some residents in this zone are closer to stores outside the survey area than within (i.e. in Corby), there is likely to be scope for the sustainability of food shopping in this zone in order to reduce the need for some residents to travel further afield for their food shopping.

Assessment of trading performance (Step 3)

- 9.17 Table CV8 of Appendix 2 sets out an overview of trading performance of convenience goods floorspace across the County, to establish whether this floorspace can be considered to be trading in line with 'benchmark' levels (i.e. company averages for national operators), or whether stores are 'overtrading' (performing at above average levels) or 'under-trading' (performing at below average levels). This exercise is only undertaken for the named main foodstores in the County rather than for local/independent specialist retailers, where there are considerably wider fluctuations in sales density. The extent of 'overtrading' is then factored into the quantitative need tabulations, working on the principle that overtrading floorspace can, in theory, equate to pent up demand for additional provision.
- 9.18 On average across the County, these 'main' foodstores are trading with an aggregate convenience goods sales density (turnover per sq.m) of approximately £11,346 per sq.m, which represents a high sales density and suggests that existing convenience goods floorspace in the County, as a whole, trades strongly.
- 9.19 Table CV8 of Appendix 2 also sets out an analysis of the trading performance of the individual foodstores in the County. The final column of Table CV8 shows the difference between the 'benchmark' trading performance (which is calculated by applying the net convenience goods sales area of the store, to the company average turnover per sq.m for convenience goods sales), and the 'actual' turnover, which is derived from the household survey results as set out in Table CV7a of Appendix 2 (for 2023).

- 9.20 In Oakham, it can be seen that the Tesco store in Oakham town centre is currently trading at +£9.1m above benchmark levels, and the new Aldi store at Barleythorpe is trading at +£13.0m above benchmark levels. Our analysis of these household survey results have identified that these two stores are by some margin the most popular destinations for convenience goods shopping for residents in Oakham's Primary Catchment Area.
- 9.21 The over-trading of these two stores is tempered by the performance of the Co-Op store at Burley Road in Oakham, which is trading at -£8.8m below company average levels, whilst the Lidl store at Barleythorpe Road, and a second small Co-Op at Braunstone Road, are both trading at company average levels. Taking these performances into account, the net position is that foodstores in Oakham are on aggregate trading at +£13.1m above 'benchmark' levels.
- 9.22 In Uppingham, the only 'main' foodstore is the Co-Op store on North Street East. The survey results identify this is performing well, trading at approximately +£3.3m above company average levels.

Other inputs into the quantitative need assessment

Sales efficiency

- 9.23 The following sales efficiency rates have been applied for the convenience goods capacity forecasts, based on forecasts set out in RP20:
- 2023-24: +3.4%
 - 2024-25: +2.8%
 - 2025-29: +0.1% per annum
 - 2020-40: No growth

Floorspace data

- 9.24 The convenience goods floorspace data which we incorporate into our modelling has been drawn from a range of data sources, including IGD, Experian Goad, commercial property websites and the Council's own planning application records. Our floorspace assumptions for foodstores make allowance for a proportion of the sales area of the foodstore to be used for the sale of comparison goods (in supermarkets, this may include books, stationery, home entertainment, small electrical items, and so on).

IDENTIFICATION OF CONVENIENCE GOODS CAPACITY

- 9.25 Having considered all of the above matters, **Table 9.3** sets out a summary of the quantitative 'need' for new 'main foodstore' convenience goods floorspace which the Council should plan for in its new Local Plan period. We have assumed that new convenience goods floorspace will achieve a turnover of £12,500 per sq.m (at 2021), which represents the current average sales density of the 'big six' convenience goods retailers (Aldi, Asda, Lidl, Morrisons, Sainsbury's and Tesco), with this sales density improving in line with the rates set out at para 9.23 above.
- 9.26 As with the comparison goods capacity forecasts, we advise that forecasts become increasing open to margins of error over time and should be refreshed over the Plan period, and on this basis forecasts beyond 2031 should be considered indicative. The forecasts are again based on a 'constant market share' approach. It should be noted that the figures in Table 9.3 are cumulative.

Table 9.3 Estimated convenience goods floorspace need for Rutland, 2023-41

Interval year	2026	2031	2036*	2041*
Estimated comparison goods floorspace requirement (sq.m net, rounded)	600	700	900	1,000

Source: Table CV10, Appendix 2. Figures are rounded to the nearest hundred. *Indicative figure only, should be subject to future review.

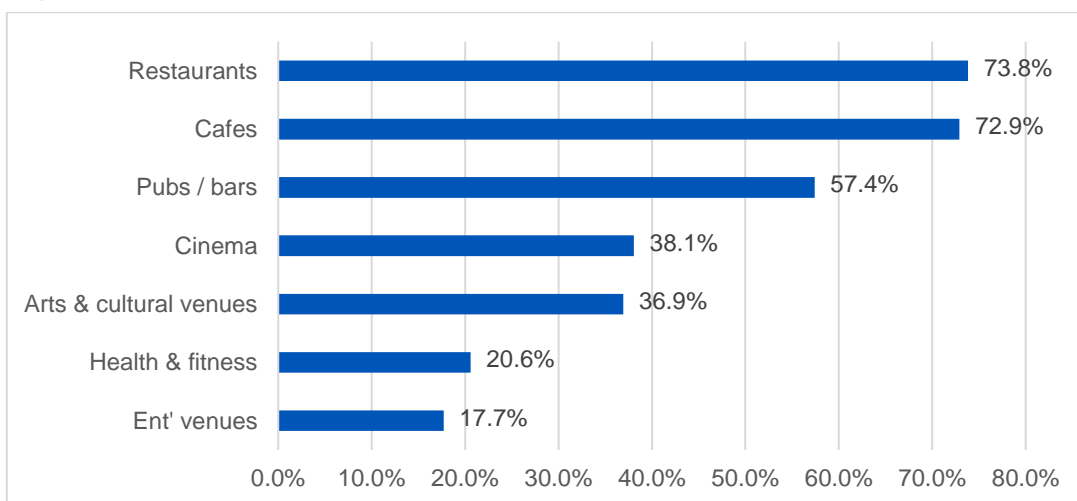
- 9.26 Table 9.3 shows that there is a positive quantitative need for additional convenience goods floorspace in the County over the course of the new Local Plan period, with an identified requirement of 600 sq.m net at 2026, which increases indicatively to 1,000 sq.m net by the end of the Plan period. This is a relatively low level of need – the figure of 1,000 sq.m net is broadly equivalent to the convenience goods sales areas of the recently-opened Lidl and Aldi stores in Oakham for example – but does nevertheless present a positive requirement which the Council will need to plan for.
- 9.27 As we have identified above, the ‘need’ for additional convenience goods floorspace is, in part, driven by the strong trading performance of a number of existing foodstores in the County. We would however advise that this ‘overtrading’ is not necessarily a concern, unless it is resulting in qualitative compromises to the performance of the floorspace, e.g. excess queuing for car parks, shelves needing to be constantly replenished during trading hours and so on. Indeed, in the case of convenience goods floorspace within defined town centres, a strong-performing foodstore will likely be resulting in higher levels of linked trips spending with other retailers and operators in the town centre, supporting its overall vitality and viability — this is the case for both the Tesco store in Oakham and Co-Op in Uppingham. The identified quantitative needs therefore need to be considered in the whole alongside these wider qualitative considerations.

- 10.1 Recent years have seen commercial leisure uses take increasing prominence in supporting the overall vitality and viability of town centres. Indeed, it is considered that this trend has become more prominent since the 2016 Study as certain types of shopping, particularly comparison goods, continue to shift towards online channels, aligned with wider legislative changes such as the introduction of Class E. Due to the apparent reduction in the amount of spent directed towards physical ‘bricks and mortar’ high-street shopping, leisure uses can often now represent a significant proportion of a town centre’s overall turnover. In both Oakham and Uppingham it is apparent that commercial leisure uses are playing an active role in supporting the overall vitality and viability of the town centres — Oakham has a strong and growing daytime leisure offer and something of a ‘café culture’ emerging, and Uppingham has an upscale offer which supports an evening economy and a number of hotels in the town centre.
- 10.2 This section of the report considers the current provision of leisure uses through the study area, including patterns of visits to restaurant, café, cinema, entertainment venues and cultural facilities, and identifies any qualitative ‘gaps’ in the provision of these facilities. The results are informed by our desktop assessments of Oakham and Uppingham town centres, as well as the findings of the household telephone survey which was carried out in support of this study.

LEISURE VISIT PATTERNS

- 10.3 The most popular types of commercial leisure activity which residents in the survey undertaken, based on the findings of the household telephone survey, are summarised in **Figure 10.1**. Only 8.5% of respondents stated that they do not take part in any commercial leisure activities. Figure 10.1 shows that visiting restaurants is the most popular commercial leisure activity, with 73.8% of respondents stating they do this; followed closely by going to cafes (72.9%), going to pubs/bars (57.4%) and cinema (38.1%). From our experience, rates of visits to the cinema are lower than typically seen, which can be considered a reflection of the fact there are no facilities of this nature within the County.

Figure 10.1 Types of commercial leisure activity undertaken by survey respondents



Source: household survey results

- 10.4 We discuss the patterns of visits to each of these types of leisure activity in further detail below. It should be noted that for types of leisure activity with lower response rates, identifying zonal patterns of visits become a less effective exercise due to the lower sample sizes, and therefore for these type of activity (e.g. health and fitness, and visits to entertainment facilities), we predominantly focus on the survey area-wide patterns of visits which the household survey has identified.

Visits to restaurants

- 10.5 Visiting restaurants is the most popular commercial leisure activity, which is undertaken by 73.8% of respondents to the household telephone survey. Analysis of the survey results indicates that Oakham town centre was identified as the most popular location for visiting restaurants, accounting for 25.7% of all responses, ahead of Stamford (11.7%) and Uppingham (10.6%). A further 8.2% of respondents stated they visit other locations in Oakham (i.e. not within the town centre). Interestingly, Oakham town centre's aggregate market share from across the survey area has decreased slightly from the position in the 2016 Study, where it attracted an aggregate market share of 28.3%.
- 10.6 The market share attracted to Oakham town centre confirms the view that these uses are supporting the overall vitality of Oakham town centre, and importantly, helping to ensure the centre has an evening as well as daytime economy.
- 10.7 Looking at zonal market shares, the following can be observed:
- Oakham town centre attracts a 55.1% market share from residents in zone 1, 31.0% from zone 2 and 27.6% from zone 3, and these are considered to represent strong market shares. It is also noteworthy that other locations in Oakham attract a further 23.6% of the market share from residents in zone 1, meaning that overall from this zone there is relatively limited 'leakage'. The survey results show that there is no clear competing destination for restaurants spending for residents in zone 1, with the remaining market share being distributed between locations such as Greetham, Lyddington, Stamford and Uppingham.
 - Restaurants in Uppingham town centre attract a 35.6% market share from the Uppingham zone (zone 6), which again is considered a reasonable performance, albeit given the quality of the offer in Uppingham perhaps one that could be considered to have scope for some improvement. Again, there is no real evidence of a single clear competing destination, although Oakham draws a combined market share of 10.5% from residents in zone 6.
 - Whilst Stamford town centre draws noteworthy market shares from zone 2 (16.6%) and zone 3 (12.0%), its position as the 2nd-most popular destination for residents in the survey area is skewed by the fact it draws a 60.3% market share from residents in zone 7, which lies in close proximity to the Stamford urban area which sits just to its west.

Visits to cafes

- 10.8 Oakham town centre captures an aggregate of 42.5% of the market share from residents in the survey area, and is by some margin the most popular destination for this type of leisure activity. Behind Oakham, Uppingham town centre attracts an aggregate market share of 14.0% followed by

Stamford at 11.9%. In the 2016 Study, Oakham attracted 40.0% of the aggregate market share for these uses from across the survey area; there has therefore been a small increase in its overall market share since this time.

- 10.9 Looking at the zonal market shares, it can be seen that Oakham town centre captures an 82.7% market share from residents in its local zone (zone 1), as well as a 60.6% market share from residents in zone 3 and 44.8% market share from residents in zone 2. We would consider these to represent strong market shares. Positively, Oakham town centre attracts market share from each of the seven survey zones. Uppingham's performance can also be considered to be strong for this type of leisure activity, drawing a 50.9% market share from its local zone (zone 6), and attracting a market share, albeit mostly relatively modest, from 6 of the 7 survey zones.

Visits to pubs/bars

- 10.10 The household survey identified this as being the third most popular leisure activity, with 57.4% of respondents stating they undertake this. Market shares for this activity are much more widely distributed compared to the restaurant / café market shares discussed above, largely on account of the rural nature of the County with many of its small villages benefiting from attractive pubs in pleasant settings, for example. Nevertheless, Oakham town centre commands an aggregate market share of 25.2% from across the survey area, with other locations in Oakham also commanding a market share of 7.0%. Uppingham town centre attracts an aggregate market share of 9.8%.
- 10.11 For zone 1, locations in Oakham act as the main attractor of market share, with pubs/bars in Oakham town centre drawing a market share of 67.7% and locations elsewhere in Oakham a further 24.4%. Oakham town centre also attracts just under 25% of the market share from zones 2 and 3. For zone 6, Uppingham town centre attracts a market share of 39.2% from its local zone, but Uppingham's influence is surprisingly limited beyond this, with the town centre attracting a market share no higher than 4.2% from any of the remaining survey zones.
- 10.12 Elsewhere in the more rural parts of the survey area some residents prefer visit local village pubs, and on account of these more localised patterns of visits identified across the survey area, in **Table 10.1**, we summarise the top three locations for visits to pubs/bars for each of the survey zones.

Table 10.1 Most popular locations for visits to pubs/bars by zone

Zone number	Zone name	Most popular pubs / bars destination	2 nd -most popular pubs / bars destination	3 rd -most popular pubs / bars destination
Zone 1	<i>Oakham</i>	Oakham town centre (67.7%)	Oakham other (24.4%)	Cottesmore (1.9%)
Zone 2	<i>Central Rutland</i>	Oakham town centre (23.3%)	North Luffenham (18.8%)	Barrowden (11.6%)
Zone 3	<i>North Rutland</i>	Oakham town centre (24.6%)	Market Overton (12.7%)	Whissendine (12.4%)

Zone 4	<i>South of Melton</i>	Melton Mowbray town centre (24.3%)	Oakham town centre (9.2%)	Somerby (7.0%)
Zone 5	<i>East of Leicester</i>	Billesdon (17.9%)	Tilton on the Hill (11.3%)	Market Harborough (8.3%)
Zone 6	<i>Uppingham & South Rutland</i>	Uppingham (39.2%)	Stamford (7.8%)	Leicester (7.7%)
Zone 7	<i>East Rutland</i>	Stamford (58.5%)	Great Casterton (11.0%)	Ketton (7.2%)

Source: household survey results

Visits to cinemas

- 10.13 Going to the cinema is cited as being the fourth most popular leisure activity for participants of the household telephone survey, with 38.1% of respondents stating that they attended a cinema. Patterns of cinema visits vary considerably by zone; as there are no cinemas within Rutland itself all residents who wish to undertake this activity are forced to travel outside the survey area. Overall, the most popular destination for residents in the survey area is the Regal in Melton Mowbray (aggregate market share 22.3%) followed by the Savoy in Corby (21.2%).
- 10.14 Residents in zone 1 (Oakham) looks towards a number of different locations for cinema visits; the Regal in Melton Mowbray attracts a market share of 21.7%, followed by Showcase cinemas in Leicester (17.7%) and Peterborough (14.3%). 14.1% of residents also responded that they visit the Rutland County Museum in Oakham town centre, which holds monthly film screenings, in an initiative which is being promoted by Arts for Rutland.
- 10.15 The market share for residents in zone 2 is also split between a variety of locations, including Showcase in Peterborough (31.1%), Savoy in Corby (20.6%), Stamford Arts Centre (18.6%) and Regal in Melton (11.4%), and for residents in zone 3 the market share is split between Regal in Melton (41.2%), and to a lesser extent Showcase cinemas in Leicester (14.6%) and Peterborough (13.2%). The Regal in Melton accounts for 79.3% of the market share in zone 4, reflecting the closer proximity of residents in this zone to Melton than the rest of the survey area.
- 10.16 Zone 5 sits to the east of Leicester and the survey results indicate that most residents look towards cinema facilities in the Leicester area; similarly zone 7's closer relationship to Stamford and Peterborough means that facilities in these locations capture the majority of the market share. Residents in zone 6 (Uppingham) predominantly look towards Corby, with the Savoy in Corby attracting a 50.2% market share from residents in this zone, followed by Showcase in Leicester (12.4%).

Visits to Theatres, Museums and Art Galleries

- 10.17 Visiting theatres, museums or art galleries was recorded as the fifth most popular leisure activity of participants of the household telephone survey, with 36.9% of respondents stating that they took part in at least one of these cultural activities.
- 10.18 The most popular location most visited for going to the theatre, museum or art gallery was London's West End (15.2%), a reflection of the extensive, world-class offer which central London can boast in respect of this type of facility, although the fact that the County does not benefit from any direct rail links to London potentially prevents this figure from being higher. The second-most popular aggregate location from the survey area is the Curve Theatre in Leicester city centre (14.9%), which has developed as a leading regional theatre in recent years and hosts a number of productions each year.
- 10.19 As with the patterns of cinema visits described above, the relative lack of facilities of this nature within the County leads to varied shopping patterns from each of the survey zones and in most cases there is no single location (with the exception of the consistent market shares which are directed towards London). However, it is noteworthy that destinations in Stamford (Arts Centre and the Corn Exchange) attract a combined market share of 59.1% from zone 7.
- 10.20 The County has relatively limited facilities within this category, but the Rutland County Museum in Oakham town centre hosts special exhibitions alongside its permanent collection and makes an important contribution to the cultural offer of the County. As noted above, this offer is further enhanced by its monthly programme of film screenings. The Rutland County Museum attracts a 14.7% market share from zone 1, 11.7% market share from zone 2 and 18.9% market share from zone 3 and we consider this to represent a relatively strong performance. Continued promotion and marketing of the facility and in particular highlighting any special / touring exhibitions which are being held should help to reinforce and strengthen this market share moving forwards.

Visits to Health & Fitness facilities⁷

- 10.21 Visiting health & fitness facilities was the fifth most popular type of leisure activity, although only 20.7% of respondents stated they participated in this. The survey results show that the County has a range of facilities (both public and private) which residents use, and most have relatively localised catchments. The only facilities which attract notable market shares from across the survey area are Uppingham Sports Centre on Leicester Road in Uppingham (26.8% market share) and the private Rutland Hall Hotel & Spa (12.3% market share). There is no County-run leisure facility in Oakham.

Visits to entertainment facilities (e.g. children's soft play, ice skating, bowling)⁸

- 10.22 This was the sixth-most popular leisure activity, although only 17.7% of respondents identified they undertook activities of this nature. The relatively low response rate for this type of activity is likely to be driven by the fact that many facilities of the type which fall into this category tend to only locate in larger / higher-order centres, from where they can serve a wide catchment. Oakham obtained a market share of 15.4% from respondents to this question, although they did not specify the name of the facility/facilities in question which were visited, and from our research we have not been able to identify any examples of facilities of this nature in Oakham.

EXPENDITURE GROWTH IN THE COMMERCIAL LEISURE SECTOR

⁷ Due to the relatively low response numbers for this question, we do not discuss zonal shopping patterns in further detail.

⁸ Due to the relatively low response numbers for this question, we do not discuss zonal shopping patterns in further detail.

- 10.23 By applying the Experian population projections we have adopted for the retail capacity forecasts to the latest per capita expenditure data on leisure spending, we can obtain an indication of the likely growth in leisure spending available to residents of the survey area. Whilst not all of this available expenditure can, by default, be used to support the development of new commercial leisure facilities in the survey area – particularly because leisure spending is often undertaken with holidays, day trips, special occasions and so on and therefore may in part be spent outside the survey area – it provides an indication of the scope for additional development to be supported, thus supporting our qualitative observations in respect of the performance of the centres set out above.
- 10.24 Experian provide per capita leisure expenditure data on the following categories of commercial leisure spending:
- ‘Cultural services’ – this includes spending on cinema, theatre, museums, live music/entertainment, nightclubs, bingo, and TV subscriptions such as Netflix. Spending on this type of leisure service ranges from £362 per person, per annum (zone 3) to £424 per person, per annum (zone 5) (at 2021)
 - ‘Recreation and sporting services’ – this includes spending on admission to spectator sports (e.g. watching football matches) and subscriptions to sports/social clubs. Spending on this type of leisure service ranges from £220 per person, per annum (zone 3) to £268 per person, per annum (zone 5) (at 2021).
 - ‘Restaurants and cafes’ – this includes spending in both restaurants and cafes, and also includes spending on ‘alcoholic drinks consumed outside the home’ (i.e. in pubs and bars) and on take-aways. Spending on this type of leisure service accounts for the majority of residents’ commercial leisure spend, ranging from £1,370 per annum (zone 3) to £1,546 per annum (zone 5) (at 2021).
- 10.25 Per capita spending on commercial leisure has been subject to significant fluctuation in recent years, on account of spending being impacted by Covid-19 and associated lockdowns and restrictions on indoor dining/meeting. Experian forecast that per capita spend on commercial leisure dropped by 37.9% between 2020 and 2021, but has subsequently ‘bounced back’ with a growth in per capita spend of 30.5% between 2021-22 and 27.7% between 2022-23. Such levels of growth largely correct the scaling back in spending which occurred during the pandemic and moving forwards growth in leisure spending is expected to be much more regularised, with RP20 forecasting growth in spend per head of a rate of 1.0% per annum growth between 2025 and 2029, reducing slightly to 0.9% per annum between 2029 and 2040.
- 10.26 By applying the average zonal per capita spend on the different types of commercial leisure activity to Experian’s population projections for the survey area, the total ‘pot’ of commercial leisure expenditure available to residents of the survey area can be calculated. The results of this exercise are summarised in **Table 10.2** for the periods 2023-31 and 2023-41. As with the retail capacity forecasts, we advise that figures beyond 2031 are considered as indicative.
- 10.27 Full tabulations for each of the commercial leisure sectors are set out **Tables L4a to L4d** of Appendix 3.

Table 10.2 Expenditure growth in key commercial leisure categories, 2023-41

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
2023-31 (£m)								
Cultural services	0.4	0.3	0.4	0.1	0.2	0.5	0.2	2.2
Recreation & sporting services	0.2	0.2	0.2	0.0	0.1	0.3	0.1	19.1
Restaurants & cafes	1.5	1.3	1.7	0.3	0.8	1.9	0.9	115.0
Total spending growth	2.0	1.8	2.3	0.4	1.1	2.6	1.2	136.3
2023-41 (indicative) (£m)								
Cultural services	1.3	1.1	1.5	0.5	0.7	1.7	0.8	7.6
Recreation & sporting services	0.8	0.7	0.9	0.3	0.4	1.1	0.5	29.4
Restaurants & cafes	5.3	4.1	5.6	1.9	2.5	6.4	2.9	165.5
Total spending growth	7.4	6.0	8.0	2.7	3.6	9.2	4.1	202.5

Source: Table L1-L4, Appendix 3

- 10.28 Overall, spending growth in the commercial leisure sector is expected to increase by £136.3m in the survey area between 2023 and 2031, and indicatively by £202.5m between 2023 and 2040. 84% of this spending growth will be in the restaurants and cafes sector, suggesting there is considerable expenditure capacity to support additional facilities of this nature across the County, and indeed as retail demand decreases, aligned with introduction of class E, it may be reasonable to expect further strong demand for this type of floorspace moving forwards, building on what appears to be considerable recent growth in this sector in the County.
- 10.29 Growth in the other key commercial leisure sectors is more limited. In particular it is noted that there is limited forecast growth in the 'cultural services' sector (which includes leisure sectors such as cinemas), suggesting that there may not be sufficient expenditure growth within the survey area to support the introduction of a cinema facility, which it is considered remains the key qualitative gap in the leisure offer of the County.

- 11.1 In this section, informed by the findings of the preceding sections of the report, we set out strategic recommendations for the Council to take forward in their new Local Plan. This largely follow the format of those set out in the 2016 Study, and in the preparation of the recommendations set out in this section we have undertaken a comprehensive review of the 2016 Study's recommendations to identify whether they remain fit for purpose. A review schedule of these and justifications for keeping / reviewing individual recommendations from the 2016 Study is set out at Appendix 5.
- 11.2 For the most part, however, it is considered that many of the 2016 Study's recommendations remain fit for purpose and can be carried forward, albeit with updates to reflect changes in policy legislation, and/or to reflect the findings of this study.
- 11.3 In this section, we also integrate the findings of previous workstreams which the Council have commissioned on retail and town centre policy matters. Specifically, we incorporate the key findings of the Oakham and Uppingham Town Centres Policy Advice (Firstplan, 2021) ('the 2021 Study'), which provided the Council with recommendations in respect of defining Primary Shopping Areas (PSAs) in Oakham and Uppingham town centres, as well as undertaking a 'critical friend' analysis of the Council's proposed policy approach to retail and town centres matters in its then-emerging Local Plan.
- 11.4 The strategic recommendations set out in blue text below, combined with the recommendations in respect of PSA boundaries, should be considered together as the overall set of recommendations for retail & main town centres policy to inform the preparation of the Council's new draft Local Plan. The recommendations on policy wording should be used to inform policy development in the new draft Local Plan. It is important to note that we have only extracted key headlines from the 2021 Study for our recommendations in this section and full regard should be had to the wider discussion and justification set out in the 2021 Study when developing policy, and therefore the findings of this report should be considered alongside those of the 2021 Study.

RUTLAND-WIDE RECOMMENDATIONS (GENERAL / STRATEGIC RECOMMENDATIONS)

- 11.5 We set out the following recommendations for the general strategic approach to planning for retail and main town centre uses in the County over the course of the new Local Plan period.
- **RCC1.** The Council should have regard to the requirements of adopted national policy when developing its retail and town centre policies for the County. The NPPF directs the development of retail and other town centre uses towards town centres in the first instance, and for development outside town centres compliance with the sequential and impact 'tests' needs to be demonstrated. Any new applications for retail or other town centre uses on the edge of, or outside of, the defined town centres in the County should therefore demonstrate that there are no sequentially preferable sites available, and that no 'significant adverse' impacts will arise on existing defined centres based on the criteria set out in the National Planning Policy Framework.

- **RCC2.** It is not considered that other centres in the County are suitable locations for new retail and town centre uses, although applications which seek to deliver local-scale enhancements to shopping provision (we would typically expect this to be under 300 sq.m net floorspace) may be acceptable and should be considered on individual merits.
- **RCC3.** Given the relatively small size of the town centres in the County and their more limited role and function compared to larger/higher order centres, they are more vulnerable to potential impacts of new development outside their town centres. On this basis it is recommended that a retail and leisure impact assessment threshold of 500 sq.m (gross) is retained and carried forward into the Council's new Local Plan. This threshold is applicable to applications for all types of retail and leisure uses which are proposed to come forward outside of a policy-defined town centre.
- **RCC4.** All application for development of main town centre uses outside a defined primary shopping area are required to demonstrate compliance with the sequential test, irrespective of the quantum of floorspace proposed.
- **RCC5.** The identified quantitative capacity requirements set out in this study should be kept under regular review throughout the Council's Local Plan period. For ease of reference, these are as summarised below. Figures beyond 2031 should be considered as indicative only.

	2026	2031	2036 (indicative)	2041 (indicative)
Estimated comparison goods floorspace requirement (sq.m net, rounded)	-800	-700	-600	-400
Estimated comparison goods floorspace requirement (sq.m net, rounded)	600	700	900	1,000

Source: Table CM10, Table CV10, Appendix 1 & 2

- **RCC6.** The Council should, in principle, support proposals which introduce residential uses or appropriate 'main town centre uses' on upper floors, in order to support additional town centre residential populations or diversify the range of uses in a centre.
- **RCC7.** The Council should seek to holistically integrate supporting Rutland's town centres into wider corporate economic and tourism strategies for the County. There is a key role for the County's town centres to play in supporting the growing tourism industry in the County, which the Council's tourism strategy is seeking to further enhance in the future. The ability of the town centres to capture visitor spend as well as local spend will help secure and enhance their vitality and viability. See also recommendations **OAK7** and **UPP8**.

OAKHAM — GENERAL / STRATEGIC RECOMMENDATIONS

11.6 We set out the following strategic recommendations in respect of retail and other main town centre uses in Oakham.

- **OAK1.** Oakham town centre should continue to perform a role and function as the highest-order centre in Rutland. Whilst there is no identified quantitative need for additional comparison goods floorspace for Rutland over the new Local Plan period, any applications seeking provision of this nature should be directed towards Oakham in the first instance and should, where necessary, demonstrate compliance with the sequential and impact retail policy tests. It is important that any new development is of a scale appropriate to the role and function of Oakham as a small market town.
- **OAK2.** It is not considered there is a qualitative need for additional foodstore provision to serve Oakham following the recent opening of the Aldi and Lidl stores, and having regard to the anchor role which the Tesco store in supporting the overall vitality and viability of Oakham town centre. However, applications which seek to develop further convenience goods provision (either extensions to existing stores or provision of new retail facilities) may be supported in principle provided that proposals are of an appropriate scale and can demonstrate compliance with the retail sequential and impact tests where necessary.
- **OAK3.** There remains a qualitative deficiency of 'bulky' comparison goods retail to serve Rutland, and the provision of such uses may assist in reducing expenditure leakage and supporting more sustainable patterns of shopping. On this basis the allocation with the Council's Site Allocations DPD for the Tim Norton site on Long Row to be used for 'bulky goods' comparison goods floorspace should be retained moving forwards, although we understand this would be subject to an alternative location for the garage premises being identified.
- **OAK4.** We do not consider the Tim Norton site to be suitable for either unrestricted class E floorspace as we understand there are potential issues with traffic congestion related to the expected increased closure periods of the adjacent level crossing. 'Bulky goods' comparison goods uses generally generate lower levels of trip generation, and are likely to be more acceptable in principle, although any development should be subject to undertaking of a Transport Assessment.

Any development at the site would need to be controlled to bulky comparison goods sales only through appropriate Local Plan policies and conditions attached to any granting of permission. Should development of this site come forward, the Council should work with the applicants and Network Rail to secure the provision of enhanced pedestrian crossing facilities across the railway line. As the site falls outside the primary shopping area and town centre boundary, compliance with the retail sequential and impact tests would still need to be satisfactorily demonstrated.

- **OAK5.** Oakham is, for the most part, an attractive town centre and the historic quality of the centre should be preserved and enhanced where possible. There are clear opportunities for improvement in certain parts of the town centre however:
 - The Council should continue to focus investment in improving the West End of the town centre in order to enhance footfall and improve the gateway to the town centre for those

arriving by rail. Improvements should include enhancements of the public realm, such as paving, as well as enhancements to shopfronts.

- There is a particular need to improve the gateway to the centre at the Melton Road / Station Road junction, which could incorporate improved pedestrian crossing facilities and better directional signage leading visitors to the town centre.
- The Council should work with landowners to ensure that any vacant units are maintained to a high visual appearance in keeping with the high environmental quality of the centre. Units should not be boarded up unless necessary to maintain the security of the building (see also recommendation **OAK14**).
- **OAK6.** There is an opportunity site within this area, the Esso Petrol Filling Station site at the junction of High Street / Dean's Street, which provides an important opportunity to extend footfall west of the Wilko store to the benefit of businesses at the western end of the centre. The petrol filling station does not make a significant contribution to the wider vitality and viability of the town centre, and breaks up the retail frontage. The redevelopment of this site should therefore be considered an aspiration for the Council. Any redevelopment should incorporate flexible class E floorspace at ground floor level.
- **OAK7.** it is recommended that the Council seek to develop a strategy for the improvement of the environmental quality and overall vitality and viability of the Gaol Street area. This area appears to be suffering from a decline in pedestrian footfall and has a number of vacant units, but plays an important role in linking the High Street with the Tesco store on South Street. As one of the few pedestrianised areas in the town centre there is scope for the development of a 'café culture' with pavement seating in this area, particularly in the under-used Knights Yard, and the Council should support applications for the development of class E food & drink uses along Gaol Street / Knight's Yard. Applications for hot food takeaway uses should be resisted.
- **OAK8.** The Council may also wish to consider the introduction of additional public realm and/or soft landscaping where appropriate along Gaol Street to help soften the street scene.
- **OAK9.** The market makes an important contribution to the vitality and viability of the town centre and support should be given to its continued development and growth. The removal of vehicular parking from the Market Place presents an opportunity for alternative seasonal / speciality markets to be introduced, further stimulating footfall and diversifying the offer of the centre, as well as improving the environmental quality of the area.
- **OAK10.** Tourism is an important industry in Rutland and Oakham benefits from close proximity to one of the area's key attractors, Rutland Water. Support should be given to place-marketing and tourism strategies which seek to enhance Oakham's role as the 'gateway' to Rutland Water. See also recommendation **RCC7**.
- **OAK11.** Given Oakham's increase role as a hub for local shopping and services it is important that local connectivity by public transport is retained and enhanced:
 - Existing levels of service provision between Oakham and Uppingham should be retained at minimum and where possible improved, including provision of a Sunday service.

- The potential for a direct, regular bus route between Oakham and Leicester should be investigated.
- **OAK12.** The key qualitative gap in commercial leisure provision remains the absence of a cinema. Whilst it is possible that there is limited expenditure capacity available to support the development of facilities of this nature in the County, should any proposals come forward they should be considered positively. Any proposed development should ideally be focussed on Oakham town centre, and if not within the town centre, would need to demonstrate compliance with the sequential and impact retail policy tests.
- **OAK13.** The development of a new residential community at Oakham North will require the provision of day-to-day shopping and services, likely to be in the form of a local centre. We understand that provision has been made for this as part of the Oakham North development and therefore, assuming this permission is implemented, we do not foresee a requirement for development of any further floorspace for retail/other main town centre uses at this location.
- **OAK14.** The Council should undertake regular auditing of levels of vacancy in Oakham town centre, and work with stakeholders and landlords where possible to secure the positive reuse of vacant premises.
- **OAK15.** The Council should continue to support the existing cultural and heritage offer of Oakham town centre, including the Rutland County Museum, heritage assets associated with Oakham Castle, and dual promotion of Oakham town centre and Rutland Water as tourism and visitor attractions.

UPPINGHAM — GENERAL / STRATEGIC RECOMMENDATIONS

11.7 We set out the following strategic recommendations in respect of retail and other main town centre uses in Uppingham.

- **UPP1.** Uppingham should continue to form a second-tier 'town centre' in the County; its more limited size and opportunities for development in the town centre make it unsuitable for development of a significant scale. It is not considered there is a quantitative or qualitative need for additional comparison goods floorspace provision to serve the town centre, and the focus should be on consolidating and supporting the continued successful trading of the existing offer.
- **UPP2.** Applications for retail and leisure development which are of an appropriate scale should be considered on their merits and, if not within the primary shopping area, demonstrate compliance with the sequential test; and if not within the town centre boundary, demonstrate compliance with the impact test if over 500 sq.m net. Applications for other main town centres outside of the defined primary shopping area will also need to demonstrate compliance with the sequential test, irrespective of their size.
- **UPP3.** This study has identified a County-wide quantitative need for the provision of up to 1,000 sq.m net additional convenience floorspace over the new Local Plan period. It is recommended that this identified need is directed towards improving convenience shopping provision in Uppingham, to reduce the amount of convenience goods expenditure which is spent outside the town and facilitate more sustainable patterns of shopping.

- **UPP4.** Any applications for new convenience goods provision which are undertaking a retail impact assessment will need to give specific and detailed consideration to the impact on any loss of spend/turnover of the Co-Op store on the overall vitality and viability of the town centre, and consider the impact on linked shopping trips between this store and other uses in the town centre. This should include a qualitative and quantitative analysis of the impact on linked trips spending in the town centre, and consideration of how any such losses could potentially be mitigated.
- **UPP5.** The Council should continue to identify and progress opportunities for enhancing linkages between the Co-Op store and remainder of Uppingham town centre, potentially as part of a broader wayfinding strategy for the town centre.
- **UPP7.** The environmental quality of Uppingham town centre is generally strong and there are no major areas of concern. The Council should continue to invest in public realm in the centre to help define a sense of place and ensure the centre maintains its smart, well-kept appearance.
- **UPP8.** Continued support and promotion should be given to Uppingham's unique selling points including its food, leisure & hotel offer; specialist retail; art dealerships; market; and historic environment and setting, in order to assist in broadening the town's offer and attraction beyond its immediate catchment.
- **UPP9.** Current levels of public transport provision, including frequent connections to Oakham and Corby, should be maintained as minimum and where possible enhanced, including the provision of Sunday bus services. There should be an aspiration to improve facilities for bus users, including real-time travel information and better waiting facilities.
- **UPP10.** The Council should undertake regular auditing of levels of vacancy in Uppingham town centre, and work with stakeholders and landlords where possible to secure the positive reuse of vacant premises.

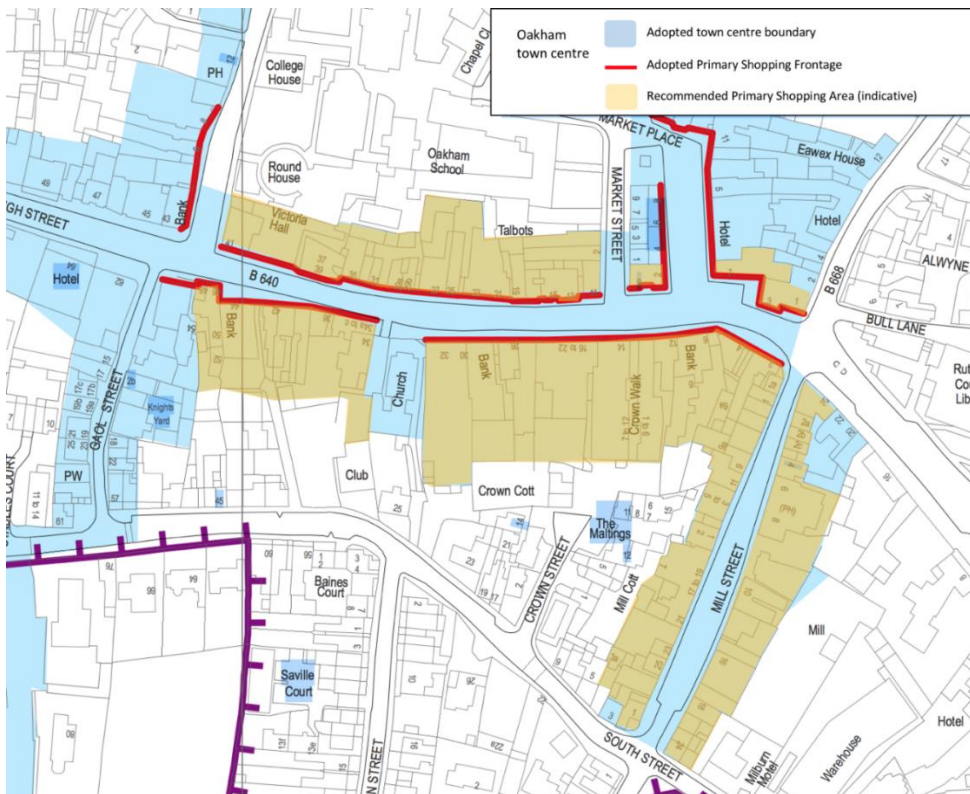
DEFINING TOWN CENTRE BOUNDARIES

- 11.8 The 2021 Study explained that a reconsideration of the Council's approach to defining Primary and Secondary Shopping Frontages is required following a revision to the wording of town centres policies in the National Planning Policy Framework (NPPF) (2019). The 2019 iteration of the NPPF removes the requirement for local planning authorities to define Primary and Secondary Shopping Frontages in their town centres but places a requirement for authorities to define Primary Shopping Areas.
- 11.9 This change was also carried forward into the 2021 iteration of the NPPF, the publication of which took place following the finalisation of the 2021 Retail Policy Advice report. The study noted that the Council's emerging Local Plan at the time did not define Primary Shopping Areas, and therefore this exercise was needed to ensure the Plan was consistent with the requirements of the NPPF. Given the NPPF continues to require local planning authorities to define Primary Shopping Areas in their development plans, it is appropriate for the Council's new Local Plan to also adopt this approach.

Oakham town centre Primary Shopping Area

- 11.10 The suggested Primary Shopping Area boundary for Oakham town centre as recommended by the 2021 Study is reproduced below as **Figure 11.1**. The justification for how these recommendations have been arrived at are set out in Section 4 of the 2021 Study. Whilst we have not undertaken a detailed update of the figures which support the analysis of how the PSA has been defined as part of this instruction, we consider that the overall rationale behind the definition of the PSA remains robust and is supported by the findings of the town centre health check undertaken by this study.

Figure 11.1 Suggested PSA boundary for Oakham town centre

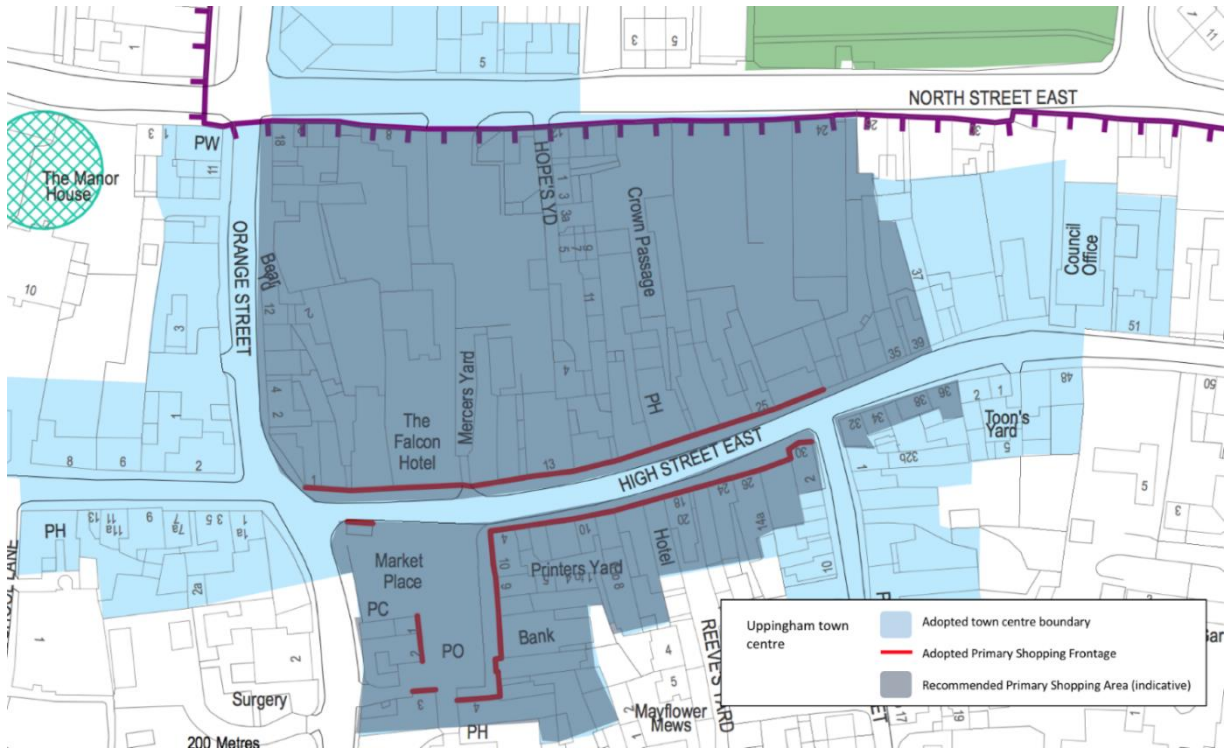


Source: Rutland Retail Policy Advice, Firstplan for RCC (2021)

Uppingham town centre Primary Shopping Area

- 11.11 In respect of Uppingham, the 2021 Study found that Uppingham town centre had a relatively 'naturally defined' PSA, as to the western and eastern fringes of the centre, commercial units quickly become more interspersed with residential and other uses (e.g. buildings associated with Uppingham School in the case of High Street West). The 'critical mass' of commercial activity therefore drops off considerably in these areas, and, combining with the lack of retail 'anchors' in these areas, means there is a limited policy case for their inclusion within a PSA.
- 11.12 The PSA which was recommended for Uppingham town centre is reproduced as **Figure 11.2**. Again, we have reviewed the continued appropriateness of this boundary in the context of the findings of the health check assessment undertaken for this Study, and consider the recommendations to remain robust. We particularly highlight that it is important for the Co-Op store on North Street East to be included within the PSA, notwithstanding its relative detachment from the rest of the retail offer in the town centre, on account of the anchor role which this store plays.

Figure 11.2 Suggested PSA boundary for Uppingham town centre



Source: Rutland Retail Policy Advice, Firstplan for RCC (2021)

REVIEW OF REG.19 LOCAL PLAN RETAIL & TOWN CENTRES POLICIES

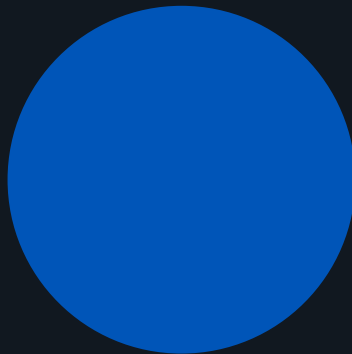
- 11.13 The recommendations set out in Section 5 of the 2021 Report in respect of recommended changes to the wording of the Reg.19 Local Plan retail & town centre policies to ensure they are compliant with the current NPPF wording and also changes to the Use Classes Order are considered to remain robust. Whilst there has been an updated publication of the NPPF in the interim period, its approach in respect of retail and town centre matters remains unchanged.

- 12.1 This report has set out an updated assessment of the quantitative retail and commercial leisure needs for Rutland over its new Local Plan period to 2041. The study will form part of the evidence base of this new Local Plan and updates the findings of the Council's previous retail and town centres evidence base which was published in 2016 ('the 2016 Study').
- 12.2 The study has had full regard to the considerable changes which have come about in respect of retailing and town centres since the 2016 Study, both in terms of national trends (such as the increases in online shopping which were heightened by the Covid-19 pandemic), key trends in the retail market, and changes at the local level. It has identified that both Oakham and Uppingham town centres continue to benefit from strong levels of vitality and viability and are considered to have weathered the challenges from recent years well, for the most part. It is positive to note that greater amounts of retail spend are being captured locally compared to the position at the time of the 2016 Study; the diversity of the offer in both Oakham and Uppingham town centres is generally strong, and the attractive and historic nature of both town centres represents a significant asset to their overall strong levels of vitality.
- 12.3 Nevertheless, there are areas of improvement which can be sought in both centres, and a successful town centre relies on a regular programme of investment and enhancement to benefit from continued levels of patronage by residents and visitors. Oakham town centre currently has a number of prominent vacant units, for which a strategy is needed to improve their visual appearance, and Uppingham has potential to make more of its attractive setting and assets. Both centres are seeing an enhancement of their food & drink offer which, in the context of the challenging retail market, is considered positive and has the benefit of increasing dwell time and supporting linked trips. The changes to planning legislation and in particular the introduction of class E have been designed to facilitate this, although it is clear that remains the retail function which underpins the vitality of both centres, particularly Oakham.
- 12.4 Since the 2016 Study, Oakham has seen the opening of new Aldi and Lidl foodstores on the outskirts of the town, a reflection of the relentless expansion drive these retailers have been on in recent years, which shows no sign of abating in the context of the current cost of living crisis. These have improved consumer choice for residents of Oakham, and do not appear, to date, to have significantly impacted on the overall vitality of the town centre. The opening of these stores, combined with the outputs of this quantitative needs exercise undertaken for this study, indicate that there is no quantitative or qualitative requirement for additional foodstore provision to serve the Oakham area over the new Plan period.
- 12.5 A positive quantitative need for the County as a whole for additional convenience goods floorspace in the region of 1,000 sq.m has been identified, however, and it is recommended that in terms of strategic planning this need would be best met by an additional foodstore to serve the Uppingham area. However, reflecting the importance the town centre Co-op store has in supporting the vitality and viability of Uppingham town centre, this will need to be carefully managed and careful consideration of sequential and retail impact matters will need to be demonstrated by any future development proposals.

- 12.6 The study has not identified any quantitative need for additional comparison goods floorspace, although the long-standing qualitative need for a limited element of 'bulky' comparison goods floorspace provision remains. The absence of need is largely driven by the fact that, in some parts of the County, almost 50% of comparison goods shopping is now undertaken online, far in excess of current national averages.
- 12.7 However, a key positive message from the study is that of the available 'bricks and mortar' comparison goods spend, a greater proportion is now being retained within the survey area than was the case at the time of the 2016 Study and indeed Oakham is now, in terms of overall spend attracted from the survey area, the overall most popular destination for comparison goods shopping (having previously been second behind Leicester). This improvement in the 'retention rate' is evidence of the attractiveness of Oakham as a shopping and leisure destination and the Council should ensure that retaining this positive performance by supporting and investing in Oakham as well as Uppingham town centres is a strategic priority.
- 12.8 Recent years have demonstrated that the retail and town centre market and policy environment is, as always, fast paced and always evolving. Consequently, it is recommended that the findings of this study are subject to regular updating/refreshing over the course of the Council's new Local Plan period.

ENDS

For and on behalf of Firstplan — October 2023



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