Central Bedfordshire Council Local Plan (2015-2035)

Retail Study

(July 2017)

Central Bedfordshire Retail Study Update 2016

1. Introduction

1.1 This is a Central Bedfordshire document which has been produced in support of the Local Plan 2015-2035 and is a requirement of the NPPF. It is part of the evidence base required to underpin the statutory plan making process and provides a review of the retail requirements within Central Bedfordshire. The study was undertaken by Peter Brett Associates (PBA) and provides an update to the Retail Study published in 2012/2013. It was updated due to the emerging national and local retail trends and the implications that these trends may have for Central Bedfordshire especially having regard to the expected growth.

1.2 As such it was considered necessary for the Retail Study Update to provide a qualitative and quantitative analysis of existing and proposed retailing and leisure uses in Central Bedfordshire and to assess the need for additional convenience and comparison retail floorspace and leisure floorspace within the main centres in Central Bedfordshire for the plan period 2015 to 2035.

2. Key Findings

2.1 Following an analysis of the emerging trends in retailing and an assessment of the need for additional convenience and comparison retail floor space and leisure floor space, the study has identified the required comparison and convenience retail floor space for Central Bedfordshire.

2.2 Having regard to the prevailing trends in retail and leisure sector towards the polarisation of the town centres, the study considered that planning for an increased market share is longer an appropriate strategy for Central Bedfordshire. This is because Central Bedfordshire is located between a number of large town centres which are highly accessible to residents and will continue to limit the proportion of expenditure retained within Central Bedfordshire.

2.3 A summary of the quantitative need for retail and commercial leisure (A3-A5) floorspace in Central Bedfordshire is set out in the table below:

Table 1: Summary of quantitative need to 2035 as identified in the Retail Study Update

	2016	**2021**	**2026**	**2031**	**2035**
Comparison goods (sqm net)	0	0	0	3,127	11,927
Convenience goods (sqm net)	0	0	0	0	0
Food and drink (sqm gross)	0	1,991	4,148	6,488	8,480

2.4 The Retail Study Update also undertook a town centre health check and proposed amendments to the town centre boundary. As a whole, the Study found that the town centres in Central Bedfordshire are performing well and play an important function for the local communities, in particular Leighton Buzzard and Biggleswade.

3. Summary of Implications

3.1 Due to Central Bedfordshire's location between a number of larger town centres and the trends in the retail and leisure sector towards the polarisation of town centres, the Retail Study Update concluded that planning for an increased market share for **comparison floorspace** is no longer an appropriate strategy for Central Bedfordshire.

3.2 A large proportion of additional available expenditure is expected to come from the new population in Central Bedfordshire, including the urban extensions, where the floorspace planned is not insubstantial. However Urban extensions have long term build out rates hence the emerging comparison need at the end of the plan period.

3.3 The Retail Study Update concluded that there is no pressing need to alleviate any potential overtrading within the existing **convenience floorspace**, although this was dependent on the treatment of overtrading within the existing floorspace.

3.4 However, it has been decided that an increase in the convenience floorspace will be planned for due to the planned housing growth and resulting increase in population as well as the documented changes in the convenience goods sector, such as the change in store formats to smaller stores. This will allow for the town centres, service centres and large villages to provide for the existing and future local need to ensure these places are more sustainable by reducing the need for residents to travel to the large adjoining centres. As such overtrading will be included in determining the retail need thus resulting in a convenience retail need up to 2035.

3.5 Since the original Retail Study in 2012/13 there has been an increase in the **leisure offer** within the town centres, with a shift in some of the town centres towards more A3 uses (restaurants and cafes). This is considered positive as these uses increase dwell times in the town centres improving the vitality and viability of them. As such an increase in food and drink uses within the designated town centres and villages will be encouraged.

3.6 Given the above reasons the quantitative need as identified in the emerging Local Plan for Central Bedfordshire to 2035 will be:

Table 2: Summary of quantitative need to 2035 as identified in the emerging Local Plan

	2016	**2021**	**2026**	**2031**	**2035**
Comparison goods (sqm net)	0	0	0	3,127	11,927
Convenience goods (sqm net)	9,638	10,300	11,940	13,618	15,129
Food and drink (sqm gross)	0	1,991	4,148	6,488	8,480

3.7 The study proposed to amend the boundaries of Dunstable, Houghton Regis and Biggleswade. The Dunstable town centre boundary has been proposed to be broadened out to incorporate the town's leisure and education quarter that has been developed. The White Lion Retail Park remains outside the identified town centre because of the separation between it and the town centre.

3.8 Due to the considerable change in Houghton Regis since the Retail Study 2012/2013 was published following the opening of a major new supermarket, the primary shopping area has been amended to include the new retail development on the south of the High Street.

3.9 Although Biggleswade is considered to be performing well, the town centre boundary has been amended to reflect the changes of use away from A1 (retail).

Appendix A

Central Bedfordshire Retail Study Update 2016

Central Bedfordshire Retail Study
2016 Update Report

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November 2016

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1 INTRODUCTION

Terms of reference

1.1 Peter Brett Associates LLP (PBA) was instructed in April 2016 by Central Bedfordshire Council (CBC) to prepare a retail study update on the Council's Central Bedfordshire Retail Study (CBRS), which was undertaken in 2012/13 by PBA.

1.2 As well as updating the study to match the new plan period to 2035, the objectives of the instruction were as follows:

- to provide an up-to-date analysis of retail and town centre policy at the national level to set the content for the preparation of more detailed policies;
- to describe current and emerging national and local trends in retailing, how they expect to develop in future years, and the implications that these trends may have for Central Bedfordshire;
- to present a health check on the vitality and viability of the main centres, namely;
    - Leighton Linslade
    - Dunstable
    - Houghton Regis
    - Biggleswade
    - Sandy
    - Flitwick
    - Ampthill
- assess the retail and leisure spend and flows split between comparison and convenience to and from Central Bedfordshire;
- provide a qualitative and quantitative analysis of existing and proposed retailing and leisure uses in Central Bedfordshire and the surrounding area, including the retail centres in the four housing market areas (HMAs);
- assess the need for additional convenience and comparison retail floor space and leisure floor space within each of the main centres listed and for Central Bedfordshire as a whole;
- assess the role that the rural economy plays in Central Bedfordshire in terms of overall retail provision and possibly policies to continue to support; and
- assess the need to amend town centre boundaries and main shopping area designations in each of the town centres.

Context

1.3 The CBRS was prepared in support of the Council's then-emerging Development Strategy which, following adoption, was intended to form part of the development plan for Central Bedfordshire. The Council are now however embarking on the preparation of a new Local Plan. This Retail Study Update (RSU) will form part of that evidence base.

1.4 Since the CBRS was published, whilst there have been a number of planning permissions issued, the only significant retail or leisure development that has taken place in Central Bedfordshire is the opening of a new Morrison's store in Houghton Regis (2,933 sqm net). There are however a significant number of commitments, in the form of new local or neighbourhood centres to support urban extensions, as well as new out-of-centre developments.

1.5 Outwith Central Bedfordshire, there has also been investment. The first stages of Leisure Plaza, Milton Keynes have been completed, including the opening of a new Morrison's store (3,500 sqm net) in 2015. In addition, there are a number of significant permissions or resolutions in place which will further enhance the retail and leisure offer of these centres, as well as that of out-of-centre locations.

1.6 The effects of these commitments and new openings are considered as part of this RSU.

Structure of the report

1.7 Responding to the tasks as set out in the terms of reference, Volume 1 of the report is structured as follows:

- Section 2 explains the planning policy context for the study
- Section 3 describes the main market and economic trends in the retail and leisure sector
- Section 4 provides an assessment of the vitality and viability of the seven identified town centres, as well as looking at out-of-centre retail provision and briefly identifies the main competition
- Section 5 sets out an updated assessment of quantitative need for retail floorspace
- Section 6 provides an assessment of qualitative need for retail floorspace
- Section 7 provides an updated commercial leisure assessment
- Section 8 provides a set of overarching recommendations for the Council to bring forward within planning policy

2 PLANNING POLICY CONTEXT

2.1 This study will form a critical part of the evidence base to inform Central Bedfordshire's new Local Plan. This section provides an overview of current national and local planning policy, before considering the relevant emerging policies within the authority area.

National planning policy

National Planning Policy Framework

2.2 The National Planning Policy Framework (NPPF) was published in March 2012; it sets out the government's planning policies for England.

2.3 The guiding principle of the NPPF is the presumption in favour of sustainable development. As paragraph 14 of the NPPF outlines, local plans should positively seek opportunities to meet the development needs of their area, and those needs should be met in full unless the adverse impact of doing so would significantly and demonstrably outweigh the benefits, or specific policies in the NPPF indicate that development should be restricted.

2.4 Section 2 of the NPPF is concerned with ensuring the vitality of town centres, and paragraph 23 states that 'planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period'.

2.5 Paragraph 23 also outlines the requirements for local planning authorities, in respect of town centres, stating that they should:

- '*recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;*
- *define a network and hierarchy of centres that is resilient to anticipated future economic changes;*
- *define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;*
- *promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;*
- *retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;*
- *allocate range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;*

- *allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;*
- *set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;*
- *recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and*
- *where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.'*

2.6 Paragraph 161 states that both quantitative and qualitative needs for retail and leisure development should be assessed.

2.7 Section 8 of the NPPF relates to healthy communities, which has relevance in shaping retail and town centre policies. Paragraph 70 relates to the delivery of '*social, recreational and cultural facilities and services'* to meet the needs of the community through:

- Positive planning for more sustainable communities through the provision of shared space and community facilities, including local shops, public houses, cultural buildings, and other local services;
- Protecting '*against the unnecessary loss of valued facilities and services, particularly where this would reduce the community's ability to meet its day-to-day needs;*
- Allowing '*established shops, facilities and services'* to sustainably modernise and be retained for the benefit of the community; and
- Adopting '*an integrated approach'* to the location of housing, economic uses and community facilities and services.

Planning Practice Guidance

2.8 The National Planning Policy Guidance (PPG) was published in March 2014 as an online document in support of the NPPF. This study has had specific regard to the Ensuring the Vitality of Town Centres section of the PPG[1].

Permitted development rights

2.9 The Town and Country Planning (General Permitted Development) (England) Order 2015 (GPDO) came into force in April 2015 and subsequent amendments were made on 6th April 2016. The GPDO 2015, as amended, makes provision for a range of permitted development rights affecting main town centre use classes, as follows:

[1] http://planningguidance.communities.gov.uk/blog/guidance/ensuring-the-vitality-of-town-centres/ensuring-the-vitality-of-town-centres-guidance/

- Allowing the change of use from shops (A1), financial and professional services (A2) (limited up to 150 sqm), betting offices, pay day loan shops and casinos to restaurants and cafes (A3), subject to prior approval;
- The removal of betting offices and pay day loan shops from the A2 use class and reclassification as sui generis.
- Allowing the change of use from retail (A1) and specified sui generis uses (betting offices, pay day loan shops and laundrettes) (limited up to 150 sqm) to residential (C3), subject to prior approval;
- Allowing the change of use from shops (A1) to financial and professional services (A2). Prior approval not required;
- Permitting up to 200 sqm of shops (A1) and financial professional services (A2) to change to assembly and leisure uses (D2), subject to prior approval;
- Making permanent the existing time limited rights for extensions to shops, offices, industrial and warehouse buildings. Prior approval not required;
- Permitting one click and collect facility per retail premises (maximum 4m height and 20 sqm gross floorspace), subject to prior approval;
- Allowing retailers to modify the size of existing shop loading bays up to 20%, subject to prior approval;
- Allowing the change of use between offices (B1(a)) and residential (C3) subject to prior approval except for excluded areas (Listed under Part 3 of Schedule 1 of the GPDO Order 2015) which will have their exclusion extended to May 2019; and,
- Allowing for the change of use between light industrial (Class B1(c)) to residential (C3) (limited up to 500 sqm) for a temporary period up to 30th September 2017, subject to prior approval.

2.10 While the majority of these changes are subject to prior approval, the last government clarified that prior approval applications are not planning applications, and they are therefore not required to be determined against the development plan. Instead the legislation sets out a number of matters against which applications are considered, a test of impact on ‘key shopping areas’ is one of these requirements. Key shopping areas should not necessarily be conflated with the NPPF’s definition of primary shopping area.

2.11 This provides local authorities some scope to consider impact on existing centres but the ethos of allowing greater flexibility within town centres to ensure their longevity sitting behind the legislation is clear and represents a sea change from the policies still in the saved Local Plan and Core Strategy which seek to more closely control the mix of uses, particularly the proportion of A1 retail uses within designated town centres.

Local policy

2.12 In April 2009, when CBC was formed, much of the development plan was either adopted or in its advanced stages of preparation. As such, until a planning policy document for the whole of the Council area is prepared, the documents relate to the former authority areas of Mid Bedfordshire or South Bedfordshire. The relevant documents are therefore referred to as either North (former Mid Bedfordshire) or South (former South Bedfordshire).

2.13 The development plan for Central Bedfordshire comprises the following:

- North Core Strategy and Development Management Policies Development Plan Document (November 2009)
- North Site Allocations Development Plan Document (April 2011)
- Saved policies of the Mid Bedfordshire Local Plan (December 2005)
- Saved policies of the South Bedfordshire Local Plan Review (January 2004)

2.14 South Bedfordshire was previously advancing a joint Core Strategy with Luton; however, this was withdrawn in July 2011. As this document pre-dates the publication of the NPPF, it is no longer being used for decision making purposes and is therefore not covered in any further detail in this study.

2.15 In November 2011, the Central Bedfordshire Economic Development Plan was adopted, setting out the Council's aspirations for the area to reach its full economic potential, highlighting the need to regenerate the authority's town centres. Masterplans and site specific development plans, in the form of supplementary planning documents (SPDs), are in place or being developed for Dunstable, Flitwick, Leighton Buzzard, Biggleswade and Houghton Regis.

2.16 In November 2015, the Council withdrew the Development Strategy (Submission version October 2014) and has now commenced work on their new Local Plan.

2.17 We consider the relevant parts of those documents below

Development plan policy

North Core Strategy and Development Management Policies Development Plan Document

2.18 The North Core Strategy (NCS) was adopted in November 2009, and it sets the spatial strategy and overarching policies to guide development in the north area of Central Bedfordshire up to 2026.

2.19 Policy CS1 identifies Biggleswade, Sandy, Ampthill and Flitwick as Major Service Centres, where 60% of future development will be located, to meet the growing needs of the town centres.

2.20 Policy CS12 deals with town centres and retailing in the area, and states that the Council will support and encourage new retail and service provision that provides more sustainable communities. This also states that within Major Service Centres, town centre boundaries will be established, within which new retail and service provision should be focused.

2.21 For other centres, the policy goes on to state that within Minor Service Centres (Arlesey, Cranfield, Marston Moretaine, Potton, Shefford and Stotfold), additional retail provision that meets the needs of that centre and that consolidates and enhances existing retail provision will be supported. For local villages, the policy states that important retail and other community facilities will be retained and additional local provision supported.

2.22 Policy DM7, Development in Town Centres, states that the Council will support and encourage additional convenience and comparison retail provision and other uses such as cultural, leisure and entertainment facilities inside the designated town centre boundaries in Biggleswade, Sandy, Ampthill and Flitwick.

North Site Allocations Development Plan Document

2.23 The Site Allocations document was adopted in April 2011, and it identifies land for new development based on the targets identified in the NCS.

2.24 Policy TC1 identifies that Biggleswade must be retained as a viable market town in line with its identified town centre boundary on the proposal map. Suitable developments, which restrict the loss of appropriate uses, should be encouraged.

2.25 Section 11.2 identifies Sandy as one of the largest towns in the northern part of Central Bedfordshire. However, physical constraints in and surrounding the town centre, make accommodating major new development difficult.

2.26 Section 11.3 states that within Ampthill there is no need for any significant additions to the retail facilities, due to the redevelopment and improvements associated with the new supermarket and shops.

2.27 Policy TC2 identifies that Flitwick has scope for further retail development, and Land at Flitwick Town Centre is identified on the proposal map for mixed-use development to provide small scale retail units. This would also include general improvements to the quality of the town centre.

South Bedfordshire Local Plan Review

2.28 The South Bedfordshire Local Plan was reviewed in January 2004, and it provides detailed policies and proposals for the development and use of land in the area.

2.29 Section 8 identifies three town centres: Dunstable, Leighton Buzzard, and Houghton Regis.

2.30 Policy TCS1 of the Local Plan states that within these town centres, as defined on the proposal map, favourable consideration will be given to proposals which will sustain and enhance vitality and viability and in particular those which support the retail function and contribute to town centre regeneration.

2.31 Policy TCS2 is concerned with the main shopping areas of Dunstable and Leighton Buzzard, and Policy TCS3 with Houghton Regis Town Centre. The policies state that changes of use or redevelopment for non-retail purposes at ground floor level will only be permitted where the local planning authority is satisfied that the vitality and viability of the town centre will be sustained and enhanced.

Other material considerations

Withdrawn policy

2.32 The draft Development Strategy was withdrawn in November 2015. This followed submission to the Secretary of State and then partial examination of the document earlier in the same year; this partial examination had raised unresolved issues largely in relation to satisfying the duty to co-operate and planned housing provision. Retail and leisure policies were specifically raised.

2.33 The withdrawn Development Strategy was based on the regeneration of town centres, supporting their viability and vitality and building upon their own unique characteristics. High quality, well designed development will be encouraged, as long as it is sensitive to the existing heritage and townscape, and also allows the economic, retail, leisure and social potential of the towns to be achieved.

2.34 Section 7 states that 'Competitive town centres should provide customer choice; with a diverse retail offer, office accommodation and a good range of leisure uses'. The retail hierarchy identified within the Development Strategy is outlined in Table 2.1 , and it is designed to support the growth of new retail development in appropriate locations and at appropriate scales.

Table 2.1: Retail hierarchy and floorspace requirements up to 2031

<table>
<tr><th></th><th>Location</th><th>Comparison (sqm)</th><th>Convenience (sqm)</th><th>Principal Function</th></tr>
<tr><td rowspan="3">Principal Town Centres</td><td>Leighton Buzzard</td><td>8,500</td><td rowspan="7">8,500 – Priority to be given to Flitwick and Biggleswade, due to current overtrading.</td><td rowspan="3">Provide a range of shops, including many national retailers and independents, as well as extensive business and leisure facilities.</td></tr>
<tr><td>Dunstable</td><td>17,000</td></tr>
<tr><td>Biggleswade</td><td>5,000</td></tr>
<tr><td rowspan="4">Secondary Town Centres</td><td>Ampthill</td><td>2,000</td><td rowspan="4">Provide a range of shops, including some national multiples and many independents, as well as a range of business and leisure facilities.</td></tr>
<tr><td>Flitwick</td><td>2,000</td></tr>
<tr><td>Houghton Regis</td><td>2,000</td></tr>
<tr><td>Sandy</td><td>2,000</td></tr>
</table>

2.35 The following policies also relate to retail and town centre uses:

- Policy 11: Town centre uses – sets out the criteria for appropriate town centre use classes and change of use, based on the criteria that all uses will be appropriate within a town centre setting, enhancing the vitality of the centre, and not adding to an over-concentration of particular uses or creating 'dead' frontage.

- Policy 12: Retail for neighbourhood centres and the rural area – sets out the appropriate criteria for accommodating retail uses in neighbourhood centres and rural areas.
- Policy 13: Dunstable town centre – identifies Dunstable as the preferred location for new retail development, as well as leisure, entertainment, offices, arts, culture and tourism.
- Policy 14: Town centre development – outlines that development proposals should be in accordance with the development briefs and masterplans of the town centres. Where there are no development briefs or masterplans, the Council will seek to support sustainable development in town centres, retaining existing retail uses in line with Policy 11.

Emerging local plan

2.36 The new Local Plan is being prepared for Central Bedfordshire, which will be informed by a number of background studies and documents, including this RSU.

2.37 The new Local Plan will set out the vision, strategic objectives, spatial strategy and policies for the area up to 2035. This will assess the general development needs in the area, considering any Green Belt reviews, and identifying potential development sites.

2.38 The preparation of the new Local Plan commenced in February 2016, with the first formal consultation planned for between December 2016 and February 2017. Pre-Submission publication is expected in late summer 2017, with submission to Secretary of State planned for December 2017. The projected timetable states that the new Local Plan will be adopted in September 2018.

Supplementary planning documents

2.39 Nine development briefs and masterplans have been prepared by CBC and are adopted as supplementary planning or technical guidance. A number of these adopted briefs are relevant to future retail development, and as such they are outlined below:

- Arlesey Cross Masterplan Document (March 2014) sets out a vision for growth to the east and west of Arlesey comprising of housing, employment, and a local centre. The land use mix identifies the potential for 10 ha of employment land, including retail uses, as well as the creation of a 1.67 ha new retail focused centre, comprising of '*a small supermarket, complementary small-scale retail units and a community building'.* The masterplan states that the main retail area will be located in a '*mixed-use central core'* at the junction between the High Street and the relief road. This central core will become a focal point for Arlesey, enhancing and complementing the existing valued amenities.
- East of Leighton Linslade Framework Plan (June 2013) is a strategic urban extension to the east and north of Leighton Linslade. The site is considered suitable for housing and employment, along with site for retail and leisure. The plan proposes a Neighbourhood Centre that would provide a *'community and*

retail facilities hub within the East of Leighton Linslade'. The plan states that this centre would *'make provision for day to day shopping needs of local residents but will not become a destination in its own right'.* Leighton Linslade town centre will continue as the primary community and retail hub for the area, and full advantage will be taken of the opportunities to link with this centre.

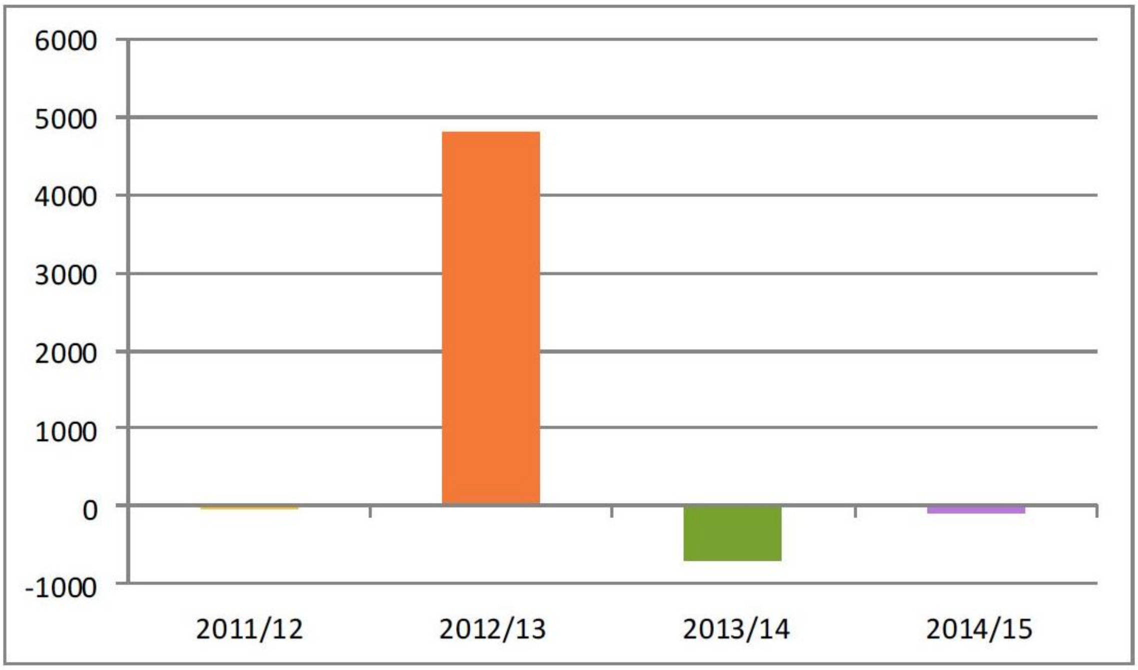
- Land North of Luton and Sundon RFI Framework Plan (March 2015) sets out its vision for a '*sustainable series of residential character areas, separated by green corridors linking Luton with the wider countryside and building upon the existing strong sense of identity'* within the area. The land north of Luton will accommodate residential and employment uses, as well as new retail and community facilities in a central community hub. This hub will be centrally located to be accessible by residents, and will complement the existing network of neighbourhood centres.
- Houghton Regis North Framework Plan (October 2012) sets out a strategic extension to provide residential and employment land, together with retail and leisure. The mixed use employment area in the north east of the site, near to Junction 11a, will offer the opportunity for retail and leisure, to add variety and liveliness to the area.
- Wixam Park Masterplan Document (April 2015) outlines the residential and employment mixed-use scheme proposed for the area. The key land uses include a local centre to provide small scale facilities for the local community, which are complementary to those in the surrounding area. Within the Core Area, there will be provision for a supermarket to serve the whole of the new settlement.
- Biggleswade Town Centre Strategy & Masterplan (July 2011) sets out a vision of where Biggleswade town centre could be in the next 15-20 years. It also provides a short-, medium-, and long-term strategy of how to get there. The Masterplan states that the vision for Biggleswade is to become the destination of choice for everyday shopping and local services for its residents and those in the surrounding villages. It should become a vibrant town, known for its niche shopping, leisure, and cultural offer.

Annual monitoring report

2.40 CBC's most recent Annual Monitoring Report (AMR) covers the period April 2014 to March 2015. Within the Business Development and Town Centres section, the report outlines the details of retail and leisure changes in floorspace, stating that '*there were relatively few retail and leisure completions in town centres during 2014/2015 and the majority of those recorded were from changes to other town centre uses'.*

2.41 The figure below is taken from the AMR and shows that since 2011, there has been a net gain of retail and leisure floorspace. This is due to the opening of a Morrison's store in Houghton Regis in 2012/2013, which accounted for 4,479 sqm of A1 floorspace.

Figure 2.1 Net additional floorspace for 'town centre uses' by monitoring year (sqm)



Source: Central Bedfordshire AMR 2014/2015

2.42 For each town centre, Table 2.2 shows the net change in retail and leisure floorspace by use class, for the period 2014/2015. It is clear that Dunstable experienced the most changes, with 306 sqm of floorspace falling out of retail and leisure use.

Table 2.2 Net retail and leisure floorspace (sqm) by use class 2014/2015

	A1	A2	A3	A4	A5	D2	Total
Ampthill	-	-	98.11	-	-	-	98.11
Biggleswade	-7.5	-	-	-	-	-	-7.5
Dunstable	-48	-83	-	-135	-40	-	-306
Flitwick	130	-50	-	-	-	-	80
Houghton Regis	-50	-	-	-	-	-	-50
Leighton Buzzard	-	85	-	-	-	-	85
Sandy	-	-	-	-	-	-	0
Total	24.5	-48	98.11	-135	-40	0	**-100.39**

Source: Central Bedfordshire AMR 2014/2015

Summary

2.43 At present, the NPPF forms the basis for retail and leisure planning policy in Central Bedfordshire. However, while the NPPF is a material consideration for development management and forms the framework within which Central Bedfordshire's development plan must sit, permitted development rights also have significant implications for planning for retail and town centre uses at a local level.

2.44 As set out above, the existing development plan and the withdrawn Development Strategy sought to include policies which limit the controls available to planning authorities particularly in terms of the preventing changes of use away from A1 uses.

The implications of these will need to be factored into plan making for retail and town centre uses.

2.45 At a local level, there are a number of supplementary planning documents in place which seek to ensure that retail and town centre uses form integral parts of planned growth in Central Bedfordshire. These are likely to remain in place as the new Local Plan comes forward.

3 RETAIL AND LEISURE CONTEXT

Introduction

3.1 The prolonged downturn in the economy had a number of clear effects on the retail landscape in the UK and it is widely accepted that the traditional role of town centres has been undermined by the continued attraction of out-of-town retail locations, the growth in popularity of multi-channel shopping, the recent economic downturn and associated decline in expenditure growth.

3.2 This section summarises published industry research on the future role and function of town centres and this is followed by a review of key trends in the retail and leisure market which are likely to influence the demand for new retail and commercial leisure floorspace at the local level over the study period. This section will also review the available evidence on retail capacity across the Local Authority area and identify competing centres outside of Central Bedfordshire.

3.3 Drawing on this research and the existing evidence, this section will identify how, at a local level, town centres can respond to national trends positively in order to enhance town centre vitality and viability.

Market and economic trends

Town centre research

3.4 Since the last economic downturn a considerable number of independent studies have been published considering the future role and function of town centres. This section summarises the most notable independent studies published over the last five years which include:

- The Portas Review, Mary Portas (2011)
- The Grimsey Review, Bill Grimsey (2013)
- Beyond Retail: Redefining the Shape and Purpose of Town Centres, British Council of Shopping Centres (2013)
- 21st Century High Streets, British Retail Consortium (2013)
- Digital High Street 2020 Report, Digital High Street Advisory Board (2015)

The Portas Review

3.5 In May 2011, retail expert Mary Portas was appointed by the Coalition Government to lead an independent review into the future of the high street in response to the decline of town centres nationally, seen as a consequence of reduced spending on the high street. The report supported the call to strengthen planning policy in favour of ‘town centre first’ and includes 27 separate recommendations to tackle the further decline of the high street.

3.6 The core recommendations included measures to strengthen the management of high streets, improvements to the business rates system, reducing car parking charges, placing greater onus on landlords to proactively manage their assets or face the use of compulsory purchase powers by local authorities, and to increase community involvement in town centres.

3.7 The Coalition Government published its formal response to the Portas Review in 2012, which accepted virtually all of the recommendations and secured funding for 24 'Portas Pilot' towns to trial the recommendations. The Coalition Government established the future High Street Forum to implement Portas's recommendations and provided funding to establish business improvement districts (BIDs) and a 'Future High Street X Fund' (renamed the High Street Renewal fund) to reward towns delivering innovative plans to rejuvenate their town centres.

The Grimsey Review

3.8 Bill Grimsey, the former managing director of DIY chain Wickes and food retailer Iceland, published his report as an 'alternative response' to the recommendations of the Portas Review. The report made a total of 31 wide-ranging recommendations, including encouraging more people to live in town centres, appointing a High Streets Minister, and freezing car parking charges for a year.

Beyond Retail

3.9 Following the Portas Review, the Government supported the establishment of an industry task force to analyse retail property issues relating to town centres. The findings of the task force's report were presented in the Beyond Retail report.

3.10 One of the report's key observations was that the trend towards market polarisation has resulted in three broad types of town centre offer: strong centres with a wide retail and leisure offer; convenience food and service-based centres with an element of fashion and comparison goods; and, localised convenience and everyday needs focused centres. The report makes a number of recommendations, including:

- Strong and dynamic leadership, led at the local authority level also including business and community involvement, to bring about long-term change in town centre functions;
- Undertake bold, strategic land assembly, to assemble redevelopment opportunities of scale and worth;
- Provide greater flexibility in the planning system to enable redundant retail premises to be converted to 'more economically productive uses';
- Consider the mechanisms to address funding gaps to encourage local authorities to commit to long-term planning for town centres;
- Town centres must take advantage of technology to assist in marketing, driving footfall, and assisting independents and SMEs; and,
- Review of the business rate system and publishing of new retail valuation guidance.

21st Century High Streets

3.11 In 2013, the British Retail Consortium published the second '21st Century High Streets' report as an update to the original report published in 2009. This sets out key policy recommendations to help secure 'flourishing 21st Century high streets' under six key topics:

- A unique sense of place: Local partnerships, authorities and retailers must create a brand for the town centre to engender consumer loyalty through differentiation and informative marketing;
- An attractive public realm: Local partnerships and authorities must actively manage the public realm creating attractive public spaces;
- Planning for success: Local authorities should develop a clear strategic vision focused on the role of the town centre and cooperate with neighbouring authorities to maintain viable and complimentary retail destinations;
- Accessibility: Local authorities should manage accessibility holistically and responsively and should provide adequate parking to assist in driving footfall;
- Safety and security: Local police should work with retailers to better understand the impacts of retail crime to promote town centres as safe, secure and effectively managed trading locations; and,
- Supportive regulatory and fiscal regimes: Central government should reform the Business Rate Multiplier to reduce the cost of operating and investing in town centres.

Digital High Street

3.12 The Digital High Street Advisory Board was established following the work of the Future High Streets Forum to consider the revolutionary impact of digital technologies on future success of high streets. The report makes four principal interrelated recommendations that are critical to the revitalisation of high streets in the impending digitally dominated world. These include the following:

- Internet infrastructure: raise connectivity standards for residences and business by 2020 and provide clear consistent public access WIFI standards for consumers between venues and providers to increase deployment of digital technology;
- Digital skills: eliminate 'digital skills gap' in communities among residents, employees and business owners;
- High street digital lab: a platform for digital consumer services which functions as a central resource for digital training programmes and provides widely available digital technology; and
- High street digital health index: adopt the index concept as a method for the Government to assess the competitiveness of high streets, measure the economic value creation from digital developments, set goals for digital integration and inspire local governments and enterprises to adopt digital technologies.

Summary

3.13 The key recommendations from each of these studies are wide-ranging although each of the studies point towards broad aims in order to maintain, and improve the vitality and viability of town centres, as follows:

- Increase footfall and expenditure in town centres: in order to increase store and centre turnover.
- Reduce costs of operating and investing in town centres: in order to improve store turnover and to level the playing field between physical ‘bricks and mortar’ and online retail businesses.

Key market trends

3.14 The market context for town centres, and retail in particular, is continuously evolving. The role of the town centre is not as clearly defined as it has historically been, and indications are that the town centres which have best weathered the recent economic downturn are those which have a diverse range of uses. In this section the key trends in the retail and leisure market which are considered to have implications on town centres in Central Bedfordshire are discussed. These include:

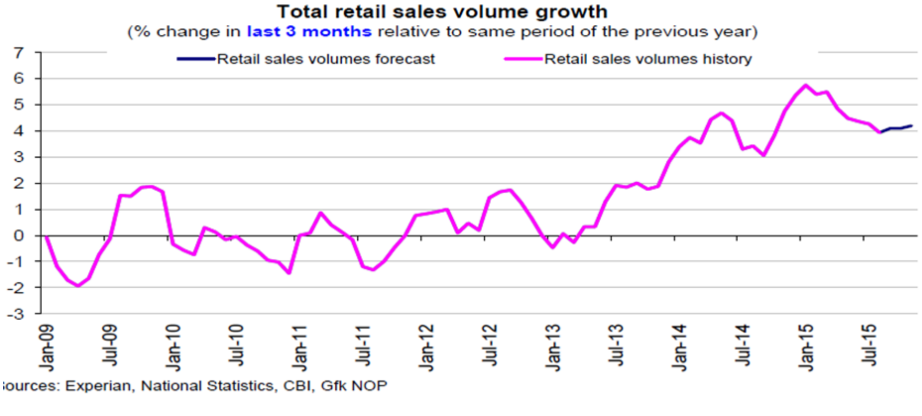
- retail expenditure growth;
- growth of multi-channel retailing;
- polarisation;
- restructuring of the convenience (food) goods sector; and,
- growth of the commercial leisure sector.

Retail expenditure growth

3.15 Although the UK economy has entered a strong period of economic recovery over the last two years the retail market has experienced some long-term consequences including the decline in retail expenditure growth and the increase of discount retailing.

3.16 The latest Experian Retail Planner Briefing Note (ERPBN13) identifies that between 2014 and 2015 sales volumes have prospered as a result of low inflation and strong earnings growth. However, consumer spending power is forecast to decline as a result of economic constraints, namely welfare cuts and rising interest rates which will reduce spending despite the gains from overall economic growth. Figure 3.1 shows how retail sales volumes growth is expected to reduce from 2015/2016 compared to the long terms trend.

Figure 3.1 Total retail sales volume growth 2099-2015



Source: Chart 2, ERPBN13 (2015)

3.17 Table 3.1 shows the long-term forecast growth in convenience and comparison goods spending per capita from 2016-2025 and 2026-2030 against the historic growth rates achieved during the 'boom' period from 1997-2007.

Table 3.1 Average annual retail growth rates per capita

Growth per capita	Annual average growth (%)		
Period	**1997-2007**	**2016-2025**	**2026-2030**
Convenience	-0.3	0.1	0.1
Comparison	8.0	3.1	3.2
Total retail	5.1	2.1	2.3

Source: Figure 2, Experian Retail Planner Briefing Note 13 (ERPBN13) (October 2015)

3.18 In the long-term, forecast growth in retail sales per capita will reach 2.4% (2023-2035) although this is well below the historic rate of 5.1%. The failure of the convenience sector to post a sustained recovery in recent years despite the strengthening of household finances has resulted in Experian's long-term growth forecasts remaining subdued over the long term (0.1%) although this exceeds the historic trend. Experian's long term comparison sector growth forecast will remain significantly lower than the pre-2007 period due to the reduction in availability of consumer credit and the need for fiscal restraint.

Growth of multi-channel retailing

3.19 The number of retail sales conducted on the high street has fallen significantly since before the last economic recession as result of the combined effects of a reduction in retail expenditure growth rates and, the growing popularity of multi-channel retailing.

3.20 Internet sales have been rising much more rapidly than general retail sales in recent years. Between 2008 and mid-2015 the proportion of retail sales from internet shopping more than doubled from, 4.7% to 11.7%. The impact of changes in shopping habits on the high street were compounded by the recession (2008-2013) which effectively reduced household's disposable income, thereby reducing retailers' margins and demand for physical retail space.

3.21 Special Forms of Trading (SFT) data is collected by the ONS and includes all non-store retail sales. Based on this data, Experian estimate that the current value of internet sales is £42bn and other non-internet SFT sales are £8bn (2011 prices).

3.22 Experian forecast that the growth of non-store (SFT) retailing will outperform traditional forms of spending until mid-2020. The rapid growth in non-store sales forecast in the short term (2015 - 2019) is expected to be sustained by the increased uptake of new technology, such as purchasing through mobile phones but the growth rate is expected to slow down after 2020.

3.23 The growth in online sales has, mainly impacted on certain sectors in the past such as electrical goods, books and music and as a result the number of retailers selling these products on the high street has reduced over recent years. Successful integration of multi-channel shopping into retailers' business strategies will drive demand for ‘bricks and mortar’ stores due to the need for click-and-collect facilities in accessible locations and large ‘showroom’ type stores where customers can test products before purchasing online.

Polarisation

3.24 Since the economic down turn a number of factors have created a need for retailers to rapidly adapt their business strategies, store formats and requirements to changing circumstances. These factors include:

- Reduced consumer expenditure growth
- Changes in customer requirements
- Growth of internet and multi-channel retailing

3.25 The combination of these factors resulted in a ‘polarisation trend’ in the restructuring of the comparison sector which refers to the preference for retailers to concentrate trading activities within larger retail centres. Retailers recognise that greater efficiency can be achieved by having a strategic network of large stores in larger retail centres offering a full range of their products, rather than a network of smaller-format stores which are only able to offer a limited range of products.

3.26 Many retailers have sought to alter their business model in this way in order to compete with internet based retailers which have significantly lower overhead costs and provide larger show-room type stores in either large ‘top 100’ retail centres or easily accessible out-of-centre retail park locations. This has contributed to a reduction of the share of non-food retail sales conducted through town centre shops declining from 64% in 2002 to just over 40% in 2013[2].

3.27 Since the end of the last recession the retail warehousing market has seen increasing demand from traditional high street retailers who consider that such units are best placed to serve the multi-channel customer by key anchor retailers (Next, Mothercare, John Lewis and Marks & Spencer). Retailers have continued to invest in new large-format stores in out-of-centre locations such as John Lewis at Home and Next Home which display their full range of products and provide click and collect facilities in accessible locations.

3.28 Continued demand for out-of-centre floorspace has reduced vacancy levels down to pre-recession levels and, due to a shortage in the new space, landlords are focusing on improving the quality of existing space through refurbishment and the introduction of a greater range of uses, including leisure[3]. As a result, retail parks are providing customers an enhanced shopping experience and becoming destinations in their own right.

3.29 As a result of the polarisation trend, national retailers are becoming increasingly concentrated within the larger regional ‘top 100’ centres which provide large format modern premises and benefit from extensive catchment areas and are able to meet

[2] Peter Brett (2013) Investing in the High Street: Town Centre Investment Management

[3] Colliers International (2016) Heading out of town-the changing landscape of the retail warehousing market

the demand for larger modern premises. As a result of this ‘polarisation’ trend, according to Deloitte, retailers will require less physical stores in future:

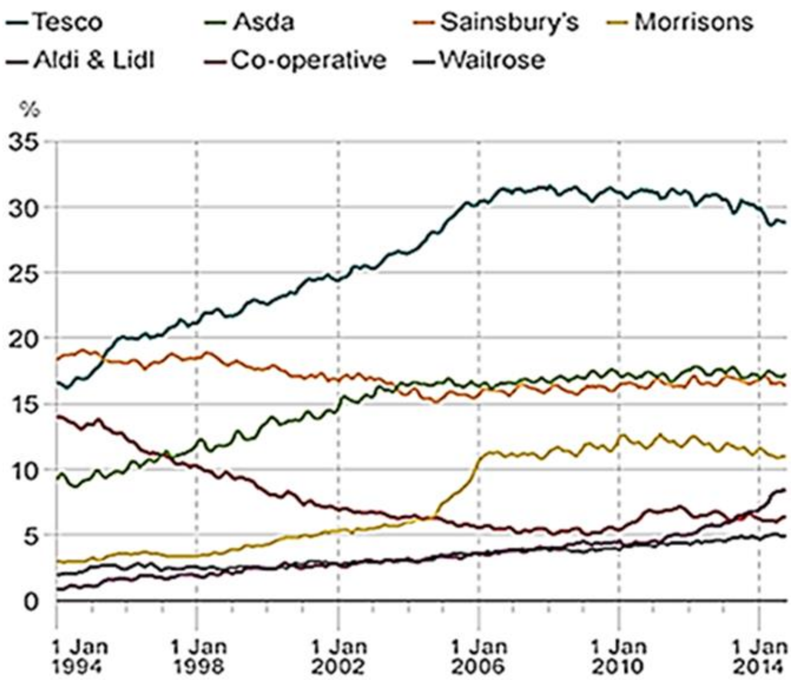
‘The increasing costs of operating stores, changes in consumer behaviours, and the growing online opportunity, coupled with the rise of shopping centres with larger catchment areas and improvements in infrastructure facilitating travel suggest that retailers will need fewer stores in the future’[4]

3.30 Deloitte estimate that portfolio reductions of between 30 to 40% are foreseeable in the short to medium term in certain retail categories. The implications of this means that small and medium-sized centres will be required to refocus their role away from being purely shopping destinations and incorporate a broader mix of retail, leisure, culture and residential uses.

Restructuring of the convenience goods sector

3.31 During the economic downturn the convenience goods sector was a key driver of growth. This sector has traditionally been dominated by the ‘Big Four’ supermarket operators: Asda, Morrison’s, Tesco and Sainsbury’s. Historically, large foodstores (2,300 sqm net) have been the primary driver of growth in the sector.

Figure 3.2 UK Major Grocery Operators Growth 1994-2014



Source: Kantar (2014) Kantar World Panel

3.32 Over the last several years’ structural changes have taken place in the sector, including:

[4] Deloitte LLP (2011) The Changing Face of Retail

- Discount food operators: operators such as Aldi and Lidl have increased market share of the grocery market significantly during the economic downturn and are continuing to expand.
- 'C-format' stores: to increase market shares, major grocery retailers have expanded their network of small in-centre convenience stores (such as Tesco Express, Sainsbury's Local and Little Waitrose) as large stores become increasingly unprofitable to operate.
- Online shopping: the 'race for space' over the last decade has resulted in major operators investing in online grocery shopping in order to increase market shares.

3.33 Discount retailers are now important forces in the convenience goods market and are expected to continue to take market share from the Big Four supermarket operators in future years. Data from Kantar shows that between January 2014 and January 2015, Aldi's and Lidl's market shares increased by 0.8% and 0.4% respectively, while the market shares of the Big Four all reduced. In 2015 Aldi overtook Waitrose as the sixth largest retailer with a market share of 5.3% up from 4% in 2014.

3.34 Verdict forecasts that within the convenience sector, the proportion of floorspace accounted for by 'smaller stores' will increase from 37.6% in 2007 to 41.6% by 2017. Verdict explains this trend as follows:

3.35 'The second dip of the double-dip recession in 2012 has knocked consumer confidence and shoppers are sticking more tightly than ever to their budgets. They are shopping little and often … increasing fuel prices, deterring out-of-town trips, and the move towards online food shopping each feed into this trend towards top-up shopping. Out-of-town space is increasingly difficult for grocers to make profitable'.

3.36 Both Sainsbury's and Tesco now have more c-stores than large supermarkets and in January 2015, Tesco announced they would be closing 43 unprofitable stores; the majority of these were large foodstores. Operators are now favouring expansion of these smaller stores and in the same month Tesco announced that they would abandon the development of 49 'very large' foodstores. Added to this, both Sainsbury's and Morrison's have sought to rein in their development pipeline and to this end have withdrawn from a number of large store format development schemes over the last year.

Growth of the commercial leisure sector

3.37 Most commentators predict that commercial leisure, such as cafes, bars, restaurants and cinemas, will constitute a growing share of town centre floorspace. This is partly a replacement activity generated as a consequence of the reduced demand for traditional retail space, and partly driven by the increase in leisure expenditure as discretionary household expenditure rises.

3.38 Although the economic downturn adversely affected leisure operators, spending growth has since made a steady recovery. According to Experian, leisure spending growth is forecast to remain above the historic trend. In the ten years between 1997 and 2007 leisure spending growth was negative, at an average of -0.7% per annum.

Compared to this, Experian forecasts that in the short to medium term spending will grow at 1.4% per annum between 2015 and 2035[5].

3.39 Leisure sector trends that are likely to affect the uptake of town centre floorspace over the study period are set out below:

- Cinema sector: is expected to expand via acquisition and diversification of the market despite falling attendance figures over the last two years. The main three operators are primarily focusing on larger markets where there is limited competition whereas the second tier and boutique operators are focusing on the qualitative difference in their offer to enable them to create specialist markets.
- Restaurant sector: contributed significantly to the continued growth of the leisure sector throughout and since the recession. Demand for A3 space is being driven by the regional expansion of successful A3 operators established in London.
- Health and fitness: the market is expected to experience continued growth in market value with annual memberships increased from 12.6% to 13.2% and 177 new facilities opened in the year up to 2014 predominantly in the budget sector.

3.40 When considering leisure expenditure available to households, spending on food and drink typically accounts for more than 50% of total leisure spending, compared to around 15% on ‘cultural services’ (e.g. going to the cinema, theatre, art galleries or live music).

3.41 There is scope for town centres to capitalise on this trend, redefining their function as leisure ‘destinations’ in their own right. The development of a strong commercial leisure offer can help to increase footfall, particularly outside of retail hours, and visitors undertaking ‘linked trips’ between retail, leisure and other uses also spend increased dwell-time in centres.

Local context

Central Bedfordshire Retail Study 2013

3.42 The previous Authority-wide retail evidence is contained within the Central Bedfordshire Council Retail Study (CBRS), published June 2012 and a subsequent addendum to the CBRS (‘the addendum’), published in April 2013 prepared by PBA.

Health checks of the main centres

3.43 The CBRS contains detailed health checks of all the town centres, based on GOAD data (where available) and informed by site visits. The concluding comments on each centre are set out below:

- Leighton Buzzard is attractive and is performing well with a high level of turnover and a low proportion of vacant units. It also has a good choice of independent comparison and convenience shops, alongside some national multiples. There

[5] Figures1a and 1b, Experian Retail Planner Briefing Note 13 (October 2015)

are two main opportunity sites for redevelopment- Land South of High Street and Bridge Meadow.

- Dunstable has a good convenience and service offer although the comparison offer is weak for a town centre of its size. There are a relatively high number of vacant units concentrated within the Quadrant Shopping Centre, indicating a lack of demand, although the centre is identified as a redevelopment opportunity.
- Biggleswade functions well with a low vacancy rate indicative of strong retailer demand. The centre provides a good convenience and service offer consistent with its role in the hierarchy. Although its comparison offer is more limited, this reflects its size and function.
- Flitwick has an adequate service and convenience offer anchored by Tesco and a more limited comparison offer consistent with its size and function. The disjointed nature of the retail units does detract from the shopping experience.
- Ampthill is an attractive, historic town centre with an interesting range of independent comparison retailers and a good choice of convenience and service units consistent with its size and role within the hierarchy.
- Sandy fulfils it role within the hierarchy with a good range of convenience and service units which appear to have a reasonable turnover. The centre also has a relatively low vacancy rate compared to the national average.
- Houghton Regis has a very limited convenience and service offer in terms of its size and role in the hierarchy although the new Morrison's supermarket (4,650 sqm) will help to address this and deliver public realm improvements.

Retail and leisure needs

3.44 Table 3.3 summarises the quantitative need forecasts for additional retail and commercial leisure floorspace across the Local Authority area from 2016-2031.

Table 3.3 Summary of quantitative need to 2031

Year	2016	2021	2026	2031
Convenience goods (sqm)				
Without overtrading	0	0	725	3,170
With overtrading	8,420	10,445	12,730	15,175
Comparison goods (sqm)				
Constant market share	1,500	7,410	11,760	16,550
Increased market share	9,895	21,830	27,690	33,990
Food & drink uses (sqm)	630	2,010	3,425	5,255

Source: BCRS (2012) and BCRS addendum (2013)

3.45 Across the study area there is both qualitative and quantitative need for new convenience provision. A significant amount of overtrading was identified in the base year equivalent to £155m, in Dunstable alone overtrading accounts for almost £66m. The study recommends planning for overtrading in order to encourage residents of the new urban extensions to shop locally, thereby retaining expenditure in Central Bedfordshire and creating sustainable shopping patterns.

3.46 In the comparison goods sector, there is a global requirement for 33,990 sqm net floorspace by 2031. The majority of this floorspace is directed towards the three largest centres to help strengthen the retail offer and enable those centres to compete with larger centres (such as Milton Keynes and Luton). This floorspace is distributed up to 2031 as follows:

- Dunstable: 16,995 sqm net (50%)
- Leighton Buzzard: 6,798 sqm net (20%)
- Biggleswade: 6,798 sqm net (20%)
- Small centres: 3,399 sqm net (10%)

3.47 The leisure need assessment identified broad quantitative needs. There is significant expenditure growth to support 5,255 sqm gross of food and drink units up to 2031, although it is emphasised that this figure should be treated sensitively. The qualitative 'gap analysis' of existing leisure provision identified capacity for the following types of leisure development over the study period:

- Improve the quality of the food and drink offer in all town centres;
- At least one new cinema, considering that there are no existing cinemas; and,
- New gyms and health and fitness facilities, based on the assessment that existing facilities are oversubscribed.

Summary

3.48 This section has identified the key trends which are likely to influence the demand for floorspace in town centres over the study period and identified proposed developments in competing centres which are likely to increase the relative attraction of these centres. In the local context, these national trends present some major implication for Central Bedfordshire's town centres.

3.49 With regard to the smaller local centres in Central Bedfordshire, the shift in convenience shopping patterns may have implications for shoppers' expectations. The increasing dominance of the Big Four in the 'c-store' market has significantly improved the quality and range of offer. Where existing provision fails to match this improved offer, there is a risk that people will divert to shops in other centres to meet their needs. If this trend is sufficiently pronounced, it poses a risk to the longevity of such stores and therefore the overall role of smaller centres in meeting the day-to-day needs of the rural catchment.

3.50 There is a role for Central Bedfordshire to ensure that the strategy adopted for each town centre is appropriate and takes account of market signals, for example, by achieving the right balance of retail and leisure provision in each centre to enable it to fulfil its role and meet the needs of its catchment. At a national level, the NPPF provides the framework for these strategies but the Government continues to emphasise the importance of local issues in formulating local policy.

3.51 In light of the recent raft of permitted development changes (GPDO 2016) which introduced further flexibility within A Class uses, having a robust and up-to-date evidence base on retail and leisure matters is particularly important in order to support locally-formulated policy solutions.

4 RETAIL AND LEISURE PROVISION

Town centre health checks

4.1 In this section, the role and function of Central Bedfordshire's town centres is considered. There are seven town centres in the area: Ampthill, Biggleswade, Dunstable, Flitwick, Houghton Regis, Leighton Buzzard and Sandy. The analysis provided is based on site visits undertaken by PBA in May 2016, with reference to the findings of the CBRS.

4.2 With the exception of Flitwick and Houghton Regis, Experian GOAD land use data was used to update the diversity of uses and vacancy rates within each centre. For Flitwick and Houghton Regis, a manual count of units was conducted, and this will be used to inform their diversity of uses.

4.3 A full schedule of uses, together with updated GOAD plans, is provided in Appendix A.

Ampthill

Diversity of uses

4.4 Ampthill is one of Central Bedfordshire's smaller towns, and is located in the central part of the authority area. Ampthill has a total of 8,990 sqm of retail floorspace, the table below shows the diversity of uses throughout the town centre.

Table 4.1 Ampthill town centre diversity of uses

Use	Ampthill Units %	UK Average Units %	Ampthill sqm %	UK Average sqm %
Convenience	8.75	9.22	34.04	18.32
Comparison	40.00	39.75	31.37	44.95
Service retailers	27.50	20.51	16.91	12.83
Miscellaneous	1.25	1.18	0.44	1.01
Vacant	1.25	12.33	1.22	10.34

Source: GOAD and PBA update (2016)

4.5 Table 4.1 shows that the number of convenience retail units in Ampthill is in line with the national average of 9%, and it is also equal to the figures obtained for the CBRS. However, the proportion of convenience floorspace is significantly above the national average, at 34% compared to 18%. The Waitrose supermarket contributes the most to this floorspace figure, and the remainder of the provision includes bakeries, a butcher, and an off licence.

4.6 The proportion of comparison goods units in Ampthill is in line with the national average of 40%, which is significantly lower than the 46% figure in the CBRS. The comparison floorspace is significantly lower than the national average, at 31% compared to 45%. This shows that since 2012 the proportion of comparison units has decreased, and those which remain are small-scale.

4.7 There are no national comparison stores within Ampthill. Instead the centre offers a quality range of independent and specialist retailers. Clothing, furniture and homeware, and gift stores dominate the comparison offer.

4.8 The proportion of service retailers in Ampthill is higher than the national average with 28% compared to 21%. The floorspace figure is also significantly higher, at 17% compared to the national average of 13%. Hairdressing and beauty units dominate the service retailer offer, representing 13% of the total units in Ampthill.

4.9 The vacancy rate in Ampthill is extremely low, with only one unit currently vacant, this represents 1% of units and floorspace. The CBRS identified three vacant units in Ampthill, representing 5% of the total units. This shows that the vacancy rate has seen improvement since 2012.

4.10 The retail offer is complemented by the weekly Charter Market, which takes place in the town centre car park every Thursday. This offers a range of fresh fruit, vegetable, and farm produce stalls, as well as gifts, plants, and homeware accessories.

4.11 Table 4.2 shows the number of units in Ampthill town centre which are in A3 to A5 use in 2016, and compares this to the findings of the CBRS. In 2012, there was no GOAD plan for Ampthill; therefore, no comparison can be made between the floorspace figures.

Table 4.2 Ampthill town centre A3-A5 uses

Use Class		2012	2016	
		Units	Units	Sqm
Food and drink	A3	7	15	13,400
Drinking establishment	A4	0	6	7,400
Hot food takeaway	A5	1	2	2,000
Total		**8**	**23**	**22,800**

Source: CBRS 2012, GOAD and PBA update (2016)

4.12 It is clear that the number of units in A3-A5 use has increased overall, with the most significant increase in A3 and A4 uses. The food and drink offer has improved significantly since 2012, with a large proportion of independent restaurants and cafes, including The Hide and Fajitas restaurants. The drinking establishment offer is all local pubs; however, there are a number of bars located within local restaurants.

4.13 There is one national operator within the food and drink offer in Ampthill, Costa. The remaining provision is small operators, with only two takeaways.

4.14 The selection of other leisure options in Ampthill is limited. The Flitwick Leisure Centre to the south is the nearest local sports facility, providing health and fitness classes, local sports halls and gym facilities. Ampthill Park provides facilities for the local football and rugby teams, as well as the Ampthill Hub, a local community facility.

4.15 There are no cinemas or theatres in Ampthill; the nearest facilities are located in Milton Keynes.

4.16 Market research has shown that there is very limited demand for retail floorspace in Ampthill. Any demand in the centre is for local independent retailers and food and drink uses.

Environmental quality

4.17 Ampthill is an attractive town centre, with historic buildings along the High Street, and some complementary newer buildings as part of the Waitrose development. The historic layout leaves little space for street furniture; however, there are a few benches, trees, and cycle parking at the open space between Bedford Street and Church Street.

Figure 4.1 Ampthill town centre environmental quality

Waitrose (left) and the Market Square and surrounding retail units (right)

4.18 Dunstable Street is busy with traffic due to its easy accessibility to the A507. Despite numerous zebra crossings, this makes crossing the road difficult for pedestrians. Although there is no train station serving the town, there are four bus routes connecting to Bedford, Flitwick and Dunstable. Ampthill and Flitwick are well connected via local bus routes, allowing Ampthill to use the train facilities provided at Flitwick Station.

4.19 From the CBRS, the on-street visitor survey found that the majority of respondents visit the town frequently and to buy food items, suggesting that the centre is primarily a convenience destination.

4.20 This survey also found that the most appreciated aspect of the town centre is the historic buildings, followed by the character/atmosphere. Although the health check suggests that the comparison offer in the centre is of a high standard, the survey found that many respondents felt that the centre needed a wider choice of independent and specialist stores. Lastly, the weekly market was popular with respondents, although the majority thought the choice of stalls could be improved.

Biggleswade

Diversity of uses

4.21 Biggleswade is one of the main towns in Central Bedfordshire, and is located in the northern part of the authority area. The town centre has a total of 22,280 sqm of retail floorspace, and the table below shows the diversity of uses throughout the centre.

Table 4.3 Biggleswade town centre diversity of uses

Use	Biggleswade Units %	UK Average Units %	Biggleswade sqm %	UK Average sqm %
Convenience	8.63	9.22	33.66	18.32
Comparison	35.97	39.75	30.21	44.95
Food and drink	15.11	17.01	9.52	12.54
Service retailers	25.18	20.51	16.47	12.83
Miscellaneous	2.16	1.18	1.08	1.01
Vacant	12.95	12.33	9.07	10.34

Source: GOAD and PBA update (2016)

4.22 Convenience units in Biggleswade are in line with the national average of 9%, and the floorspace is significantly higher than the national average, at 34% compared to 18%. This proportion of convenience floorspace is similar to that shown in the CBRS. There are three supermarkets in the town centre which contribute significantly to these figures: Asda, Aldi, and Iceland. The remaining provision includes bakers, butchers and off licences.

4.23 36% of units in Biggleswade offer comparison goods, significantly lower than the national average of 40%. The quantum of floorspace is also lower than the UK average, with 30% compared to 45%. The CBRS found that comparison goods accounted for 33% of the local floorspace, showing that the comparison offer has decreased since 2012. In general, there is a mid-market comparison retail offer, with a small number of value oriented operators, such as Poundland and a few charity stores.

4.24 There are a limited number of national retailers in Biggleswade, including New Look, Boots, and Peacocks. The majority of comparison units are independent stores, with a number specialising in gifts, boutique ladies wear, and footwear.

4.25 There are significantly more service retailers in Biggleswade than the national average, as 25% of units and 17% of floorspace is occupied by this use. Hairdressing and beauty uses dominate, as they occupy 14% of the town centre's total units.

4.26 The vacancy rate in Biggleswade is relatively on par with the national average. However, when compared to the findings from the CBRS, the vacancy rate has increased by 2% from 7% of the floorspace. There is a slight clustering of vacant units at the southern end of Hitchin Street, with the remainder dispersed throughout the town.

4.27 The retail offer is complemented by the Biggleswade Market, which takes place every Tuesday and Saturday, with a monthly farmers' market at the end of the month. The weekly market offers a wide variety of goods, including fashion, fresh meats, bread, and gifts. The monthly farmers market offers more specialist products.

4.28 Table 4.4 shows the number of units and floorspace in Biggleswade town centre which are in A3-A5 use in 2016, and compares this to the findings from the CBRS.

There has been a small increase in the proportion of units and floorspace in A3-A5 use class, with the most significant change for A3 uses.

Table 4.4 Biggleswade town centre A3-A5 uses

Use Class		2012		2016	
		Units	Sqm	Units	Sqm
Food and drink	A3	8	830	11	1220
Drinking establishment	A4	10	2090	9	1870
Hot food takeaway	A5	9	790	11	970
Total		**27**	**3710**	**31**	**4060**

Source: CBRS 2012, GOAD and PBA update (2016)

4.29 The food and drink offer is mainly comprised of local cafes, with very few restaurants on offer. Of the A3-A5 units, half are occupied by takeaways, and the only national retailers are Pizza Express and Subway. For a town centre of its size, Biggleswade has a significant selection of drinking establishments, all of which are local pubs, including the Whistle & Flute and the New Inn.

4.30 The wider leisure offer in Biggleswade is limited to the Saxon Pool and Leisure Centre. It provides swimming pool, sports hall, and gym and fitness facilities to the town and the wider area. There are no cinemas or theatres in Biggleswade, and the nearest facilities are located in either Bedford or St Neots.

Market signals

4.31 Discussions with agents have shown that Biggleswade is considered the main shopping destination in this part of Central Bedfordshire, as this town centre has a much stronger retail offer than its main local competitor, Sandy. The majority of occupier demand is generated by businesses based in Central Bedfordshire, with more limited market interest from businesses outside the authority in Bedford, Peterborough and Milton Keynes.

4.32 The market research suggests that demand for space in Biggleswade is dominated by independent operators i.e. there is no evidence that the centre's current role will change significantly in the short to medium term. This is unsurprising given the nature of available space within the centre which lacks the larger-format floorplates that national occupiers would seek. Additionally, and although outside the town centre, it is notable that the profile of retail occupier demand at Biggleswade Retail Park is dominated by national operators.

4.33 There is significantly more demand for food and drink and service retailers within Biggleswade, with evidence of a Wetherspoons seeking space in the centre. Prime A rents for Biggleswade are £40 per sqft. The only significant sites available for retail development in the centre are those identified in the masterplan near to Back Lane and Bonds Lane (KS07 & KS08), but there is no current evidence of market interest to bring such development forward.

Environmental quality

4.34 Biggleswade town centre is a mix of modern and historic buildings, and although some look tired, they are all well maintained. The local environment is generally pleasant, with street furniture, cycle parking, and benches throughout.

Figure 4.2 Biggleswade town centre environmental quality

Bike parking facilities (left) and historic retail units on Market Place (right)

4.35 Pedestrian accessibility throughout the centre is good, with ample crossing points and central roads which are not overly busy. Biggleswade is well served by public transport, with a train station just to the south of the centre, as well as seven bus routes providing connections to Bedford, Sandy, Flitwick and Milton Keynes.

4.36 The CBRS on-street survey found that the majority of respondents were visiting Biggleswade for a short time and with the purpose of buying food items, suggesting that this is a popular convenience shopping destination.

4.37 The survey also found that the majority of respondents felt that the best thing about Biggleswade was its convenience, and the local market was very popular with respondents, who could not think of anything about it they would change.

Dunstable

Diversity of uses

4.38 Dunstable is one of Central Bedfordshire's main towns, and is located in the southern part of the authority area. Dunstable town centre has a total of 43,380 sqm of floorspace, and the table below shows the diversity of uses in the town centre.

Table 4.5 Dunstable town centre diversity of uses

Use	Dunstable Units %	UK Average Units %	Dunstable sqm %	UK Average sqm %
Convenience	11.38	9.22	26.97	18.32
Comparison	30.89	39.75	33.70	44.95
Food and drink	15.45	17.01	11.23	12.54
Service retailers	22.76	20.51	14.43	12.83
Miscellaneous	2.85	1.18	1.43	1.01
Vacant	16.67	12.33	12.24	10.34

Source: GOAD and PBA update (2016)

4.39 Dunstable has significantly more convenience retail units and floorspace than the national average, with 11% and 27% respectively. The Asda supermarket is the largest constituent of the total convenience floorspace, with the remaining units including Aldi, Farmfoods, and a number of local bakers and grocers. The proportion of convenience floorspace has seen relatively little change since the CBRS, showing that there have been few changes to the convenience retail offer in Dunstable in recent years.

4.40 The number of comparison units and floorspace in Dunstable is lower than the national average, with 31% and 34% respectively, compared to 40% and 45%. This is also lower than the findings from the CBRS, which found that 36% of the floorspace was occupied by comparison stores. Although there has been a decline in the proportion of comparison units in the town, there are a number of national retailers, including WH Smith, Wilko, Argos, and New Look. That said, the comparison offer remains focused on value end of the market, including a significant number of charity shops.

4.41 The proportion of service retailers in Dunstable is slightly more than the national average. Hairdressing and beauty uses dominate, as they occupy 13% of the total units.

4.42 There is a higher vacancy rate than average in Dunstable, with 17% vacant units, and 12% vacant floorspace. The floorspace vacancy rate from 2012 was 13%, showing that there has been a slight decrease in the local vacancies. There is a concentration of vacant units in the Quadrant shopping centre and along High Street South.

4.43 The retail offer is complemented by the weekly market, held on Wednesdays, Fridays, and Saturdays. As well as offering a variety of locally produced goods for sale, the market also offers a car boot sale section for local residents to sell their own goods.

4.44 Table 4.6 shows the number of units and floorspace in Dunstable town centre which are in A3-A5 use in 2016, and compares this to the findings from the CBRS. Due to the relocation of units, the floorspace figures have altered slightly since 2012. However, the most significant change is in the number of A3 units.

Table 4.6 Dunstable town centre A3-A5 uses

Use Class		2012		2016	
		Units	Sqm	Units	Sqm
Food and drink	A3	17	2860	21	2910
Drinking establishment	A4	9	2740	9	2640
Hot food takeaway	A5	16	1310	16	1580
Total		**42**	**6910**	**46**	**7130**

Source: CBRS 2012, GOAD and PBA update (2016)

4.45 The A3 offer in Dunstable provides a balanced selection of local cafes and restaurants. In 2012, the number of takeaways was greater than the food and drink offer; however, the increase in A3 units since then has created a more favourable offer. The majority of food and drink units are local independents, with the only national retailers being Subway and Costa. There is a selection of drinking establishments on offer, most of which are local pubs; however, there are a few late night bars.

4.46 There is a reasonable leisure offer in Dunstable, with the Grove Theatre providing local events, theatre performances and film showing to the local community. The nearest multiscreen cinema is located in Luton. The Dunstable Leisure Centre also provides gym, fitness, and sports hall facilities for the town and the wider area.

Market signals

4.47 Dunstable town centre has to compete with the retail offer at the White Lion Retail Park, as well as the fashion and retail offer at the Asda supermarket. Dunstable's main competitors outside of Central Bedfordshire are Milton Keynes and Luton. Market research has revealed that rents in Dunstable town centre are strongest in the Quadrant Shopping Centre, where the Prime A space can achieve £40 per sqft.

4.48 Recent deals in Dunstable have included the opening of the new Burger King at the entrance to the Quadrant, as well as new leases for Costa, Specsavers, and Bon Marche. The Co-op has shown interest in opening a food store in the centre, but they have not formally secured a site. Generally, though, the majority of interest from occupiers comes from value oriented retailers.

4.49 Vacancy rates are high in Dunstable and there is no evidence that any significant redevelopment of any sites, or any new retail based development will come forward in the short to medium term. Discussions with agents suggest that there is a need to improve the quality of the retail facilities in the Quadrant and the rest of the centre, in order to attract more interest from occupiers.

Environmental quality

4.50 Dunstable has generally average quality buildings, and the presence of the busy A5 road through the centre of the town severely compromises the overall quality of the centre, as it creates high levels of noise, pollution, and negative visual impact. This traffic also makes pedestrian movement difficult. Although the Quadrant shopping centre is in good condition, its modern style is not particularly attractive.

Figure 4.3 Dunstable environmental quality

The Quadrant shopping centre (left) and High Street (right)

4.51 The general quality of the town centre could be improved, as there is a lack of street furniture, planting and benches. There is an adequate provision of these on the edges of the centre, making those areas considerably more attractive that the central areas.

4.52 Although there is no train station serving Dunstable, there are eight different bus routes linking the centre to Leighton Buzzard, St Albans, Bedford and Milton Keynes. There is also a dedicated Luton-Dunstable Busway, provided direct access to the bus and train services of Luton.

4.53 The CBRS on-street survey found that respondents visited the centre regularly and mainly to buy food items, suggesting Dunstable's role as a convenience destination. A significant number of respondents did state that they visit Dunstable for comparison shopping, however it is likely that this trade comes as spin off trade from the convenience shopping.

4.54 The convenience of the centre was the most liked aspect of the town centre, followed by 'nothing in particular'. The choice of retailers and the quality of the retail offer was considered inadequate. Furthermore, the weekly market was not particularly popular with respondents.

Flitwick

Diversity of uses

4.55 Flitwick is one of the smaller towns in Central Bedfordshire, and is located in the central part of the authority area. There are only 35 units in Flitwick; the Table 4.7 shows the diversity of uses in the town centre.

4.56 The convenience store retail provision is on par with the national average, at 9%. This is also the same as the findings from the CBRS. There are three convenience units, a Tesco, the Co-op, and a local newsagent.

Table 4.7 Flitwick town centre diversity of uses

Use	Flitwick Units %	UK Average Units %
Convenience	8.57	9.22
Comparison	28.57	39.75
Food and drink	22.86	17.01
Service retailers	37.14	20.51
Miscellaneous	2.86	1.18
Vacant	0.00	12.33

Source: GOAD and PBA update (2016)

4.57 There is a limited comparison offer, with the proportion of units significantly below the national average, at 29% compared to 40%. Although this is low, since the CBRS, there has been an increase in comparison units of 3%. There are no national operators of comparison stores in Flitwick, instead there are a selection of mid-market local independent units, including a florist, opticians, jewellers and a gift store.

4.58 The provision of service retailers in Flitwick is significantly higher than the national average, at 37% compared to 21%. This use is dominated by estate agents, including Taylors, Connells, and Urban & Rural. There is also a significant number of hairdressing and beauty salons.

4.59 There are no vacant retail units in Flitwick, representing a positive change from the three vacant units identified in 2012.

4.60 Every Friday there is a weekly market held behind Flitwick Village Hall, selling a range of produce, including meat, fish, bakery products, cheese, bicycles and plants.

4.61 Table 4.8 shows the number of units in Flitwick town centre which are in A3-A5 use in 2016, and compares this to the findings from the CBRS. There is no GOAD plan for Flitwick, therefore no comparison can be made between the floorspace figures. The only change in the A3-A5 offer in Flitwick is in the A3 units, of which there are three more than in 2012. The additional units are the Flitwick Sandwich Bar, Costa, and the Bollywood Lounge restaurant. The remaining offer comprises local takeaways and The Swan pub.

Table 4.8 Flitwick town centre A3-A5 uses

Use Class		2012	2016
		Units	Units
Food and Drink	A3	2	5
Drinking Establishment	A4	1	1
Hot Food Takeaway	A5	3	3
Totals		**6**	**9**

Source: CBRS 2012, GOAD and PBA update (2016)

4.62 There is a very limited leisure offer in Flitwick town centre itself, with the most significant facility being the Flitwick Leisure Centre 750m to the north of the centre. This provides sports halls as well as gym and fitness facilities and classes. The nearest cinema and theatre facilities are located in Milton Keynes.

4.63 There is also the Millbrook Golf Club to the north west of the centre, which provides golfing facilities, as well as a lounge and bar.

4.64 Discussions with local agents have shown that there is very limited demand for retail or other town centre floorspace in Flitwick; this is unsurprising given the low level of vacancies. However, agents confirm that of this limited market demand, it is focused on convenience operators and service occupiers.

Environmental quality

4.65 The quality and attractiveness of Flitwick town centre is limited. The centre is dissected by the railway line and main roads, as well as a large area of car parking, which all serve to limit the legibility of the centre. Added to this, the buildings are generally poor quality. The poor quality layout and design of Flitwick exacerbates the congestion on the road, creating problems for pedestrian accessibility.

Figure 4.4 Flitwick town centre environmental quality

High Street (left) and Coniston Road (right)

4.66 The centre is well connected via public transport because of the local train station and five bus routes linking to Ampthill, Bedford, Dunstable, and Milton Keynes. Flitwick is well connected to Ampthill via local bus routes, providing access to the quality retail facilities of that town centre.

4.67 The CBRS on-street survey found that purchasing food items and using service retailers was the most common reason for visiting Flitwick. This reflects the dominance of the Tesco store, and the large quantity of service retailers.

4.68 Things that respondents liked about the town centre included its convenience, safety and the good quality supermarket. A large majority of respondents thought that a better range of independent shops would improve the centre. The local market was popular with the majority of respondents, as they enjoyed the selection and choice of stalls.

Houghton Regis

Diversity of uses

4.69 Houghton Regis is one of Central Bedfordshire's smaller towns, and is located in the southern part of the authority area. There are only 27 retail units in Houghton Regis. The table below shows the diversity of uses in the town centre.

Table 4.9 Houghton Regis town centre diversity of uses

Use	Houghton Regis Units %	UK average Units %
Convenience	22.22	9.22
Comparison	37.04	39.75
Food and drink	18.52	17.01
Service retailers	18.52	20.51
Miscellaneous	0.00	1.18
Vacant	3.70	12.33

Source: GOAD and PBA update (2016)

4.70 22% of units in Houghton Regis are occupied by convenience stores, significantly higher than the 9% national average. This is 3% lower than the findings from the CBRS; nevertheless, the town centre still offers a large Morrison's supermarket, a Greggs, and a number of local newsagents.

4.71 The comparison offer is just below the national average, at 37% compared to 40%. This has also fallen since 2012, and the town centre is limited in its choice of comparison stores. The clothing and footwear offer is very limited; instead Houghton Regis's comparison offer includes a unit selling car parts and accessories, together with a number of discounters (including Poundstretchers) and charity shops.

4.72 The proportion of service retailers is relatively in line with the national average and mainly comprises hairdressing and beauty salons. There is only one vacant unit in Houghton Regis following the closure of NatWest.

4.73 Table 4.10 shows the number of units in Houghton Regis town centre in A3-A5 use in 2016, and compares this to the findings from the CBRS. There is no GOAD plan for Houghton Regis; therefore, no comparison can be made between the floorspace figures. Although there has been an overall increase in A3-A5 units, there have been no significant changes.

4.74 The food and drink offer consists of the Café De King and Cinnamon Lounge Bar. The town centre has a significant number of takeaways for its size, and this has increased since 2012. The Kings Arms is the only drinking establishment in the centre.

Table 4.10 Houghton Regis town centre A3-A5 uses

Use Class		2012 Units	2016 Units
Food and drink	A3	2	2
Drinking establishment	A4	0	1
Hot food takeaway	A5	2	3
Total		**4**	**6**

Source: CBRS 2012, GOAD and PBA update (2016)

4.75 There is a very limited leisure offer in Houghton Regis. The Houghton Regis Leisure Centre is located 2km to the north east of the centre, and it provides fitness and gym facilities, as well as sports halls and classes. There are no cinemas or theatres in the centre.

4.76 Market research has shown that there is very limited demand amongst operators for retail floorspace in Houghton Regis. Any demand in the centre is for service retailers and food and drink operators.

Environmental quality

4.77 The majority of the retail offer in Houghton Regis is at Bedford Square, a purpose built, pedestrianised, shopping square, which provides adequate, but not particularly attractive shopping facilities. The general quality of the town centre is poor, however, there have been public realm improvements surrounding the Morrison's store.

Figure 4.5 Houghton Regis town centre environmental quality

The street frontage (left) and retail units (right) of Bedford Square

4.78 This is not a busy town centre, and as such pedestrian accessibility is adequate. Although there is no train station there are four bus routes which connect the centre to Dunstable and Luton.

Leighton Buzzard

Diversity of uses

4.79 Leighton Buzzard is one of the main town centres in Central Bedfordshire, and is located in the south east of the authority area. Leighton Buzzard has a total of 34,460 sqm of retail floorspace, and the table below shows the diversity of uses in the town centre.

Table 4.11 Leighton Buzzard town centre diversity of uses

Use	Leighton Buzzard Units %	UK Average Units %	Leighton Buzzard sqm %	UK Average sqm %
Convenience	7.59	9.22	24.06	18.32
Comparison	43.30	39.75	39.68	44.95
Food and drink	15.63	17.01	13.15	12.54
Service retailers	24.11	20.51	15.00	12.83
Miscellaneous	0.45	1.18	1.08	1.01
Vacant	8.93	12.33	7.02	10.34

Source: GOAD and PBA update (2016)

4.80 The proportion of convenience units in Leighton Buzzard is just below the national average, at 8%; however, the floorspace is significantly higher than average, at 24% compared to 18%. This is comparable to the findings of the CBRS, suggesting little has changed since 2012. The town centre has a good selection of convenience stores, including a Morrison’s supermarket, Iceland, and a Waitrose, with small independent offerings from bakeries, delicatessens and a butcher.

4.81 43% of units in Leighton Buzzard are occupied by comparison uses, however; only 40% of the floorspace is occupied by this use, compared to the national average of 45%. This represents the small-scale nature of most retail units, due to the historic layout of the town centre. The majority of national operators are located in Waterborne Walk shopping centre, including New Look, Boots, and the Card Factory. There is also a wide selection of independent and specialist stores, including The Spotted Sheep Needlecraft, Angelica’s Gifts, and Marisa Helene Ladies wear.

4.82 Leighton Buzzard has a medium to quality comparison retail offer. The retail units within the Waterborne Walk shopping centre are mostly mid-market, and there are a significant number of higher-quality local retail units spread throughout the town centre.

4.83 There is an above average representation from service retailers within the town centre. The majority are hairdressing and beauty salons, as these represent 13% of the total units in Leighton Buzzard. There are also a significant number of estate agents and financial services.

4.84 There are a total of 20 vacant units in Leighton Buzzard, representing 9% of the total units and 7% of the floorspace, both below the national average. In the CBRS only 5% of the floorspace was vacant; therefore, the vacancy rate has increased since then. There are clusters of vacant units within Westborne Walk shopping centre, High Street Mews, and Bell Alley, suggesting that these areas need some improvement.

4.85 To complement the retail offer there is a local market held every Saturday and Tuesday, offering a range of local produce. On the first Saturday of every month there is also a ‘Pop Up’ market which gives local new businesses an opportunity to sell their products.

4.86 Table 4.12 shows the number of units and floorspace in Leighton Buzzard town centre which are in A3-A5 use in 2016, and compares this to the findings from the 2012 Retail Study. There has been an overall increase in the proportion of units and floorspace in A3-A5 use, although the number of drinking establishments has decreased.

Table 4.12 Leighton Buzzard town centre A3-A5 uses

Use Class		2012		2016	
		Units	Sqm	Units	Sqm
Food and drink	A3	19	1920	22	2480
Drinking establishment	A4	14	3460	12	2980
Hot food takeaway	A5	9	660	12	930
Total		**42**	**6040**	**46**	**6390**

Source: CBRS 2012, GOAD and PBA update (2016)

4.87 The A3 offer has increased since 2012, and there is now a wide selection of local cafes and restaurants, including Oliver Hare & Co café and the Pantry Restaurant. The majority of units are local independents, although national retailers do include Costa, Subway and Pizza Express. The takeaway offer has also increased, providing a range of pizza, Indian, and Fish and Chip takeaways.

4.88 Although the number of drinking establishments has decreased, there is still a wide selection on offer, including a range of local pubs, as well as the Bar Buddha and the Picture House bar.

4.89 There is a reasonable leisure offer in Leighton Buzzard, with the Leighton Buzzard theatre and library showing local performances as well as occasional film screenings. The Tiddenfoot Leisure Centre provides swimming pool, gym and fitness suites, as well as classes and sports halls.

Market signals

4.90 Leighton Buzzard has to compete with the retail offer in Milton Keynes and Luton, and to an extent with the national retailers located in Dunstable.

4.91 As the majority of the town centre units are small, recent deals have been for local comparison retail and independent food and drink operators. There is demand from national retailers in Waterborne Walk, where the unit sizes are larger than the rest of the town centre.

Environmental quality

4.92 Leighton Buzzard has an attractive town centre, with a balanced mix of historic and modern shop fronts. The centre is well maintained, with ample seating, trees and planters throughout. The roads throughout the centre are generally quiet, so there are no pedestrian accessibility issues.

4.93 Leighton Buzzard is very well connected, with a well-connected train station and many bus links to surrounding towns and cities.

4.94 The CBRS on-street survey found that respondents visited Leighton Buzzard for a wide variety of reasons; however, the most popular response was for buying non-food items. The majority of respondents stated that they visit the centre two to three times a week, suggesting that it is also a popular destination for everyday shopping needs.

Figure 4.6 Leighton Buzzard town centre environmental quality

Market Square (left) and the High Street (right)

4.95 The centre is generally well liked, and the only aspect respondents did not like was the lack of national multiples. The local market was perceived positively; respondents stated that it has a good range and choice of stalls.

Sandy

Diversity of uses

4.96 Sandy is one of the smaller towns in Central Bedfordshire, and is located in the northern part of the authority area. Sandy has a total of 7,660 sqm of retail floorspace, and the table below shows the diversity of uses in the town centre.

Table 4.13 Sandy town centre diversity of uses

Use	Sandy Units %	UK Average Units %	Sandy sqm %	UK Average sqm %
Convenience	11.48	9.22	21.28	18.32
Comparison	24.59	39.75	26.89	44.95
Food and drink	18.03	17.01	20.63	12.54
Service retailers	36.07	20.51	25.72	12.83
Miscellaneous	3.28	1.18	1.70	1.01
Vacant	6.56	12.33	3.79	10.34

Source: GOAD and PBA update (2016)

4.97 The proportion of convenience units and floorspace in Sandy is significantly above the national averages, at 12% and 21% respectively. These results are in line with those from 2012. The largest convenience unit is the Budgens supermarket, the remaining provision consists of a baker, a butcher, and local newsagents.

4.98 The comparison offer in the town centre is significantly below the national averages for units and floorspace, with 25% and 27% respectively. The results from the CBRS suggest that there have been few changes since then. The comparison offer is limited to budget to mid-market furniture and charity stores, and there is only one fashion store, and no national operators.

4.99 The proportion of service retailers is significantly higher than the national average for units and floorspace, with 36% and 26% respectively. Hairdressing and beauty salons make up the majority of this provision as they account for 23% of the total units in Sandy.

4.100 There are only four vacant units in Sandy, representing 7% of units and 4% of floorspace. This is one less vacant unit than was identified in the CBRS.

4.101 There is a weekly market held every Friday in Sandy; however, there have been recent discussions surrounding the quality of this market and whether it should be maintained.

4.102 Table 4.14 shows the number of units and floorspace in Sandy town centre which are in A3-A5 use in 2016, and compares this to the findings from the CBRS. The A3-A5 offer in Sandy has decreased since 2012, although there has been an increase of one unit in the A3 offer.

Table 4.14 Sandy town centre A3-A5 uses

Use Class		2012		2016	
		Units	Sqm	Units	Sqm
Food and drink	A3	7	1,040	8	1,300
Drinking establishment	A4	3	490	2	280
Hot food takeaway	A5	5	360	4	320
Total		**15**	**1,890**	**14**	**1,900**

Source: CBRS, GOAD and PBA research

4.103 Despite the decrease, there remains a good selection on offer, with a variety of takeaways, as well as local restaurants and cafes, including Mamas café and Maharajah of Sandy. There are also two local pubs, the Sir William Peel and the Queens Head.

4.104 There is a limited leisure offer in Sandy, with the Sandy Sports Centre providing fitness and gym facilities, as well as sports halls and classes. There are no cinemas or theatres in the centre, and the nearest facilities are located in Bedford or St Neots.

4.105 Market research has shown that there is very limited demand for retail floorspace in Sandy. There have been no deals for retail or leisure premises in recent years, and any demand in the centre is for convenience retailers and food and drink operators. Given the size of the centre, this is not surprising and should not necessarily be interpreted as a sign of poor health.

Environmental quality

4.106 Although Sandy does not benefit from attractive historic buildings, the centre is well maintained, with pleasant open spaces with street furniture, including benches and planters. The busy road through the centre does create unpleasant noise and visual impact which has a negative effect on the centre as a whole.

Figure 4.7 Sandy town centre environmental quality

Market Square (left) and the High Street (right)

4.107 Accessibility is generally good, with a train station to the south of the centre and three bus routes providing connections to Bedford, Biggleswade, Letchworth and Cambridge.

4.108 The CBRS on-street survey found that Sandy is a popular convenience destination as the majority of respondents visit it to buy food items. The service retailers were another popular reason for visiting the centre.

4.109 The only aspect of the centre which was disliked by respondents was the lack of choice of shops, both national and independent. However, the majority stated that they liked the convenience and sense of community of the centre.

Out-of-centre retail and leisure in Central Bedfordshire

4.110 The retail offer in Central Bedfordshire is primarily located in the seven town centres assessed above. However, there are also a number of out-of-centre retail and leisure destinations as set out in the table below.

Table 4.15 Central Bedfordshire out-of-centre offer

Destination	Tenants
Biggleswade Retail Park	Next, Boots, M&S, Matalan, Outfit, H&M, River Island, New Look, TK Maxx, Laura Ashley, Wilko, Homebase, Argos, Pats at Home, Benson for Beds, and Halfords.

Destination	Tenants
White Lion Retail Park, Dunstable	DW Sports Fitness, Dreams, Halfords, Pets at Home, Staples, Holiday Hypermarket, Powerhouse, SCS, Paul Simon, Pizza Hut, and KFC.
Vimy Road, Leighton Buzzard	Homebase, Tesco, Aldi, Majestic Wine, and Fitness 4 Less.

Source: PBA research

4.111 Table 4.15 outlines the out-of-centre destinations in Central Bedfordshire and their tenants.

4.112 Biggleswade Retail Park is located approximately 2km south of Biggleswade town centre, adjacent to the A1. The final phase of development has now been completed, and the majority of units have been let to fashion retail occupiers, with a few homeware stores. This retail park provides a variety of unit sizes, and is entirely let to national multiple retailers. There are very few national multiple retailers in Biggleswade, and those that do exist provide a small scale budget oriented fashion offer. Biggleswade Retail Park provides a larger scale mid-market fashion offer, with large homeware stores, and is therefore significantly different to the offer in Biggleswade town centre.

4.113 The White Lion Retail Park is located approximately 1km north east of Dunstable town centre. This retail park offers a range of bulky goods occupiers which are not present in Dunstable town centre. There is also a food and drink offer at the retail park, in the form of Pizza Hut and KFC, which will compete with the offer in the town centre. The White Lion Retail Park has planning permission for the refurbishment of the site, involving the installation of mezzanine floorspace and the sub-division of unit 1 into three smaller units. This will create units which are more in line with the unit sizes in Dunstable town centre, therefore creating increased competition between these two shopping destinations.

4.114 The retail offer on (and surrounding) Vimy Road is located approximately 500m from Leighton Buzzard town centre, adjacent to Leighton Road. There is a strong convenience and bulky goods retail offer, which is supplemented by a gym. This is in contrast to the offer in Leighton Buzzard town centre which has limited bulky goods retail; however, there is plainly competition between the in- and out-of-centre convenience offers.

Competing centres outside Central Bedfordshire

4.115 Central Bedfordshire is surrounded by a number of larger competing centres which exert a significant influence over local authority area as well as the study area more broadly. Table 4.16 below sets out the VENUESCORE ranking for these main competing centres and the main town centres in Central Bedfordshire.

Table 4.16 Venuescore 2015

Town centre	Market position	Location grade	Venuescore rank 2015
Dunstable	**Lower Middle**	**Major District**	**423**
Leighton Buzzard	**Middle**	**Major District**	**590**
Biggleswade	**Lower Middle**	**Minor District**	**1151**
Milton Keynes	Upper Middle	Major Regional	34
Luton	Middle	Regional	91
Bedford	Middle	Regional	100
Stevenage	Lower Middle	Regional	157

Source: Venuescore (2016) Javelin

4.116 The VENUESCORE is provided by Javelin Group and is calculated for each centre using a scoring system that takes account of the presence of multiple retailers, anchor stores and fashion operators which is then weighted to reflect the relevant centre's overall impact on shopping patterns:

'The score attached to each operator is weighted to reflect their overall impact on shopping patterns. For example, anchor stores such as John Lewis, Marks & Spencer and Selfridges receive a higher score than other unit stores. The resulting aggregate score for each venue is called is VENUESCORE.'

4.117 Operators are differentiated into different classes: at the top of the hierarchy sit Premier Department Stores (e.g. Harrods, Selfridges in London), down to the bottom tier of Other Multiple Retailers (e.g. 99p Stores, Carphone Warehouse and Clarks). The classifications include both comparison and convenience retailers.

4.118 It is important to note that the geographical area used to define the town or city centre is unlikely to coincide with the adopted primary shopping areas and that edge-of-centre retail units will be included within the score attributed. This is constant across all the centres and as such, as a comparison tool, it is still considered useful.

4.119 Table 4.16 identifies how centres within Central Bedfordshire compare with the main competing centres and the following paragraphs provide a profile on each centre, identifying any planned town centre developments or investments which will improve the town centre offer.

Milton Keynes

4.120 Milton Keynes is a prominent regional retail centre with an extensive catchment area which extends across Central Bedfordshire to the east, up to Rugby in the north and Luton to the south. According to the retail study, prepared by PBA, the centre comprises 230,610 sqm gross retail floorspace across 348 units.

4.121 Milton Keynes has excellent representation from national comparison retailers and a diverse commercial leisure offer. The retail offer includes 348 retail units which are mainly located in the Centre:mk, and intu Midsummer Place shopping centres. Key anchor stores include John Lewis, House of Fraser, Marks & Spencer and Debenhams which act as a significant draw for shoppers.

4.122 The shopping centres provide a strong food and drink offer together with the Xscape leisure venue which provides a wide range of leisure facilities including cinema, gym, snowzone and casino.

4.123 Milton Keynes retail offer has been significantly improved in recent years and there are plans to further upgrade the retail and leisure offer as well as the town centre environment. Proposed and recent redevelopments are summarised below:

- Theatre District: planning permission was secured in 2015 for the redevelopment of the Theatre District which constitutes a £7m investment and includes additional retail (approx. 200 sqm) and leisure (approx. 900 sqm) floorspace as well as a new hotel and significant public realm upgrades. This development has not yet been implemented.
- intu Midsummer Place: proposals for the redevelopment of the shopping centre seek to provide new modern retail units (4,000 sqm), a food and drink quarter (2,600 sqm) and a new boutique cinema. The application (15/01074/OUT) was approved at committee in 2015 although it was subsequently called in by the secretary of state. The public inquiry is scheduled to take place in September 2016.
- Leisure Plaza: planning permission has been secured for a mixed use development including a new ice rink, over 3,000 sqm of additional leisure floorspace and over 8,000 sqm of retail floorspace (10/01790/FUL; 12/02440/MMAM). The first part of the development has been delivered- Morrison's opened a new supermarket (3,500 sqm) on the site in 2015.

4.124 Outside Milton Keynes town centre, there are number of retail parks that enhance the retail and leisure attraction of the centre as summarised in the table below.

Table 4.17 Milton Keynes out-of-centre offer

Destination	Tenants
Cairngorm Retail Park	DFS, Oak Furniture Land, SCS, Carpetright, Furniture Village
Winterhill	Harveys, Sofaworks, B&M, Dreams, Wickes, The Range
Grampian Gate Retail Park	Maplin Electronics, Tile Depot, ALF Pet Supplies
MK1 Shopping & Leisure Park	Marks & Spencer, Primark, River Island, Outfit, H&M, Next, New Look, Odeon, Prezzo, Pizza Express, TGI Fridays, Bela Italia, Frankie & Benny's, Chimichnaga

Source: PBA research

Bedford

4.125 Bedford is an attractive historic market town and the core catchment area is predominantly limited to Bedford Borough. According to Experian GOAD (2014), the centre comprises 55,240 sqm gross retail floorspace across 202 units.

4.126 Bedford has a strong mid-market comparison offer with most national retailers represented; these retailers are concentrated in the Harpur Shopping Centre and surrounding streets. The convenience offer is somewhat under-represented but this is enhanced by a range of regular markets.

4.127 The cultural, leisure and tourism offer has historically been under-represented but has improved in recent years with new developments focusing on enhancing the centres key strengths- the river front and the town's heritage value. Proposed and recent redevelopments are summarised below:

- Riverside north: planning permission was granted for a mixed-use redevelopment in 2014 due to open in 2017. The development includes a new 6-screen cinema, hotel, restaurants and 64 new homes in the town centre set around a new public square along the river front. The scheme has secured pre-lets from Wagamama, Zizzi, Chimichanga, Bella Italia and Harvester.

4.128 Bedford has a number of edge and out-of-centre retail parks which add to the comparison offer and the overall attraction of the centre, these are summarised in the table below.

Table 4.18 Bedford out-of-centre offer

Destination	Tenants
Interchange Retail Park	Argos, Boots, Brantano, Clarks, Matalan, Next, Outfit, Pets at Home, Poundstretcher, Sports Direct, TK Maxx, Toys'R'Us, Harvey's, SCS, The Range, Dreams, KFC, Burger King, Mc Donald's
St. John's Centre	Carpet right, Halfords, Homebase, Maplin Electronics, Mothercare, Wren Kitchens, Hobbycraft, PC World, Currys, Majestic wine
Alban Retail Park	Dunelm Mill, Jollyes pet store, B&M variety store

Source: PBA research

Luton

4.129 Luton is a regional centre and its core catchment area covers parts of Central Bedfordshire including Dunstable and Houghton Regis, located just 7km and 9km west of the town respectively. According to the 2012 retail study, prepared by WYG, the centre comprises 98,600 sqm of retail floorspace.

4.130 The comparison retail offer is slightly under represented for a centre of its size and function although it does contain a broad mix of uses with University of Bedfordshire Luton campus and employment uses around the core central retail area. The comparison retail offer is concentrated in George Street and The Mall shopping centre which was extended in 2011 following a £20m investment to provide 6,000 sqm retail floorspace and 124 homes. National retailers present include: Primark, Debenhams, Marks & Spencer, Top Shop, River Island, Superdrug and Boots.

4.131 The Galaxy leisure complex anchors the town centre leisure offer and incudes, a Cineworld cinema, bowling alley and restaurants units. National food and drink operators in the centre include: Nando's, Subway, Jimmy's, Five Guys, Costa and Muffin Break.

4.132 Luton Borough Council adopted a Town Centre Development Framework in 2004 and the three main objectives are to promote investment in the retail and leisure offer, improve accessibility and the public realm. The proposed relocation of Luton Town Football Club to the Power Court site will deliver a significant mixed-use development in the town centre while the proposed redevelopment of the existing stadium at Newlands Park will deliver an enhanced edge of centre retail and leisure offer. Together, these developments have the potential to transform the quality of Luton's town centre offer. Although no planning applications have been submitted to date, information made available from the public consultation suggests that the following will be delivered:

- Power Court: the new stadium will deliver a new commercial development including a new supermarket, 4,500 sqm of bars, restaurants, lifestyle retail units, a small niche cinema and 500 apartments set around a new public piazza.
- Newlands Park: a new leisure and retail complex with a cinema, food and drink quarter and retail units in a high quality crystal shaped building with an active green roof including a café and walking track.

4.133 Luton has a limited number of out-of-centre retail parks which add to the comparison offer and the overall attraction of the centre, these are summarised in the table below.

Table 4.19 Luton out-of-centre offer

Destination	Tenants
Dallow Road Retail Park	B&Q, Aldi
Hatters Way Shopping Park	Bathstore, SCS, Harvey's, Carpetwright, PizzaHut, Bensons for Beds

Source: PBA research

Stevenage

4.134 Stevenage town centre is one of the post-war new towns and the core catchment area is predominantly limited to the borough boundaries. According to the 2012 Retail Study, prepared by Applied Planning, the centre has 56,300 sqm of retail and service floorspace across 128 units.

4.135 The centre has a high proportion of comparison units which are located in two main shopping centres; the Westgate Centre and The Forum. Key national retailers include Next, TK Maxx, H&M and Waterstones. The town centre leisure offer is limited with just a small number of bars and restaurants. The town centre shopping environment is relatively poor and requires upgrading to meet shoppers and retailer's expectations.

4.136 Stevenage Borough Council (SBC) established the Stevenage First Town Centre Task Force in 2014 with ambitious plans to regenerate the town centre and deliver new retail, leisure and employment floorspace. A framework for town centre regeneration was published in June 2015, this sets out three drivers for redevelopment, including: providing a clear rationale for targeted public sector investment, stimulating private development activity, and maximising the benefits of rail accessibility. In terms of progress, the Task Force have secured £15m of Central Government funding through the LEP[6].

4.137 Although no planning application have been submitted to date, the Stevenage Central Framework, prepared by David Lock Associates on behalf of SBC, sets out plans for upgraded retail and leisure facilities across a number of key development sites:

- Central West: identified capacity for 21,450 sqm of civic, leisure and cultural uses alongside new employment space and homes.
- Park Place and Town Centre Gardens: identified capacity for 3,800 sqm of new large format retail units and 5,000 sqm civic, leisure and cultural uses adjacent to the town centre gardens.
- Stevenage Central Core: identified capacity for 6,050 sqm retail and 8,000 sqm of civic, leisure and cultural uses set around a new Town Square, providing high quality public space and pedestrian routes through to the rail station.

4.138 Stevenage has a number of edge and out-of-centre retail parks which supplement the comparison and leisure offer and the overall attraction of the centre, these are summarised in the table below.

Table 4.20 Stevenage out-of-centre offer

Destination	Tenants
Roaring Meg Retail Park	Currys/PC World, truGym, Partyman, Sharps, DFS, Toys R Us, Boots, Carpetright, Argos, Hobbycraft, Harveys, Debenhams, Oak Furnitureland, ScS, Tapi, Wren Living, Furniture Village, Wickes, The Range
Stevenage Leisure Park	Cineworld, Hollywood Bowl, Mr Mulligan's Lost World Golf, David Lloyd, ASK, Coast to Coast, Chiquito, Frankie and Benny's, Nando's, Mc Donald's, Prezzo, Pizza Hut
Stevenage Retail Park	PC World, Dunelm, Halfords, Maplin, Sony Centre, Laura Ashley

Source: PBA research

Summary

4.139 From our assessment of the main town centres in Central Bedfordshire, we consider that Leighton Buzzard and Biggleswade continue to perform well, in line with the findings of the CBRS. However, it is noted that there are a significant number of commitments for new floorspace outside Leighton Buzzard town centre (see Section 5). If these are implemented, they could represent a threat to the vitality of the centre.

[6] http://www.hertfordshiremercury.co.uk/1-billion-needed-regenerate-Stevenage-town-centre/story-28897928-detail/story.html

4.140 Dunstable remains dominated by its convenience offer, albeit there have been limited additions to that offer in the last few years. Vacancy levels in the centre remain relatively high and subject to concentrations in the less attractive parts of the town. In spite of there being available space, there is limited evidence of retail demand. We consider the centre to be less robust.

4.141 Sandy and Ampthill are both smaller town centres which continue to perform well for their size. Flitwick remains subject to the physical issues identified in the CBRS in terms of disjointedness; little has changed in this regard but it continues to have a strong retail offer with no vacancies so is performing well.

4.142 There has been significant change in Houghton Regis since the CBRS was published following the opening of a major new Morrison's foodstore. However, our health check suggests that the offer in the rest of the centre has undergone little change such that the spin-off benefits of the Morrison's remain very limited.

4.143 In relation to leisure provision, beyond the food and drink sector, there have been limited changes since the CBRS was undertaken. This should not be interpreted as a specific weakness of Central Bedfordshire but more it serves to underline the fact that investment in higher value leisure uses remains focused on only the very largest centres.

4.144 The out-of-centre retail offer in Central Bedfordshire is limited, and in most cases these facilities have relatively limited overlap with the current town centre retail offer. However, the approved relaxation on the range of goods that can be sold from White Lion Retail Park, which currently acts as a bulky goods destination, could give rise to increased competition and potentially divert shoppers from nearby Dunstable town centre. That said, the most significant source of competition for Central Bedfordshire's town centres comes from those centres and out-of-centre facilities located outside the authority, particularly Milton Keynes, Luton, Stevenage and Bedford.

4.145 The polarisation trend will pose a challenge to small and medium sized town centres, such as those in Central Bedfordshire, as national retailers look to the larger regional centres and out of town retail parks to meet their requirement for modern large format units. There is a risk that smaller centres will continue to lose an increasing amount of retail expenditure to Milton Keynes and to a lesser extent, Luton and Stevenage where the Local Authorities are proactively working with the private sector to improve the town centre offer.

4.146 There is also significant opportunity if centres succeed in harnessing the benefits of omni-channel retailing through promoting click and collect schemes and allowing showrooming to effectively increase the retail offer and drive footfall in the town centre. Central Bedfordshire is currently underserved by leisure facilities and the continued growth of leisure spending post-recession presents an opportunity to improve the vitality and viability of centres through the development of a wider mix of uses (leisure, community, and housing) which will drive footfall.

5 UPDATED QUANTITATIVE NEED ASSESSMENT

Method

5.1 In updating the quantitative retail need assessment, we use an identical method as used in the CBRS, namely the widely respected step-by-step approach, which is consistent with PPG. The method is not rehearsed in detail; this can be found in the CBRS.

Existing survey

5.2 We use the same household survey data as used in 2012 to undertake this update since there have not been any significant change in shopping provision that will have permanently changed shopping patterns. However, at the margin, consumer preferences may have changed and thus the outputs from the survey should be treated with a degree of caution.

5.3 The study area that we have used (identical to that in the CBRS) is attached at Appendix B, while our quantitative spreadsheets are attached at Appendix C. The study area extends beyond the authority boundary and is reflective of the fact that shopping catchments do not align with administrative boundaries. Since we are using the market share of destinations within Central Bedfordshire only, we are ring fencing the money available to support growth in the Central Bedfordshire itself and there is no claim on growth for nearby centres.

5.4 The CBRS set out a number of different market share scenarios. In this RSU, we only use constant market shares i.e. Central Bedfordshire maintain their market share versus that flowing to other centres outside the authority area. This reflects the analysis provided in the preceding sections on changing shopping patterns, notably those of polarisation towards larger centres.

5.5 In Central Bedfordshire's case, it competes for residents' expenditure with a number of much larger centres. For this reason, we do not think it is appropriate to examine scenarios which look to increase the authority's market share. We do however provide scenarios in the convenience analysis which include and exclude overtrading. Further explanation is provided below.

Updated inputs

5.6 The table below compares the inputs used in the CBRS with those used in the current study.

Table 5.1: Quantitative data inputs

Input	CBRS 2013	RSU 2016	Comment
Base and forecast years	2012, 2016, 2021, 2026 and 2031	2016, 2021, 2026, 2031 and 2035	Base year rolled forward to reflect plan

Input	CBRS 2013	RSU 2016	Comment
Population base data and projections	MapInfo population data (2009) for base year, projected forward using CBC population projections (50% and 100% migration scenarios)	Experian population data in 2011, projected forward based on CBC SHMA (2016 Update)	To align with the SHMA, 2015 taken as the starting population year. Projected forward across the study period in line with the latest SHMA.
Expenditure data and price base	Pitney Bowes Business Insight and Oxford Economics for 2009 in 2009 prices	Experian expenditure data (2015) in 2014 prices	Latest available data
Retail expenditure growth rate	PBBI Retail Expenditure Guide 2011-12 and Experian Retail Planner Briefing Note 9 (September 2011)	Experian Retail Planner Briefing Note 13 (October 2015)	Latest available data
Special forms of trading	Experian Retail Planner Briefing Note 9	Experian Retail Planner Briefing Note 13	Latest available data
Sales density growth	Comparison – 1.7% (2012-16) & 1.8% (2016-31) per annum Convenience – 0.1% (2012-16), 0.3% (2016-21) and 0.2% (2021-31) per annum	Comparison – 1.5% per annum Convenience – 0%	See below

Population and expenditure data

5.7 Comments received from adjoining authorities on the withdrawn Development Strategy document and specifically in relation to the retail evidence raised concerns that the population projections used in the CBRS were not consistent with planned housing and employment growth.

5.8 To resolve this issue, this study cross-refers to both the Luton and Central Bedfordshire Strategic Housing Market Assessment Update (summer 2015) ('the 2015 SHMA') and the subsequent 2016 update to that study ('the 2016 SHMA'). The 2016 SHMA covers the period 2015 to 2035; the objectively assessed housing need set out in that report is used to derive a growth rate based on the projected number of additional dwellings over that period.

5.9 This growth rate is then applied to the 2011 Experian populations for the constituent study zones. It should be noted that because the 2016 SHMA is based on authority-wide figures, the 2015 population figures set out in the 2016 SHMA cannot be used in this study because they cannot be disaggregated into a postal sector basis to align with the zones. However, Experian population data used in this study is based on ONS figures so should be regarded as broadly comparable with the base year of the 2016 SHMA.

Table 5.2: SHMA summary

	Luton	Central Beds	Total
Population 2015	217,096	271,529	488,625
Population 2035	253,654	325,061	578,716
Total growth	36,558	53,532	90,091

Source: Luton & Central Bedfordshire Strategic Housing Market Assessment Update 2016

5.10 The 2016 SHMA projects a constant annualised rate of delivery of housing across the period from 2015 to 2035. The same constant approach is adopted for the purpose of this study i.e. an annual increase of 4,505 people.

5.11 With reference to Figure 63 of the 2015 SHMA, in accordance with the approach adopted with ORS in the 2015 SHMA, apportioned the additional people across the HMA zones. We have then overlaid the constituent housing market areas onto the study area to derive zonal population growth. Within each HMA, growth was assigned proportionately based on the 2015 starting population i.e. zones with larger populations are expected to take a higher proportion of the projected growth.

Table 5.3: Population projections by zone

Zone	HMA	Annual growth	Growth 2015-31
1a	Luton	861	17,223
1b	Luton	902	18,033
2	Stevenage & Welwyn	196	3,920
3	Stevenage & Welwyn	404	8,072
4	Luton	390	7,805
5	Luton	376	7,529
6	Luton	212	4,244
7	Luton	230	4,592
8	Milton Keynes	323	6,469
9	Milton Keynes	238	4,768
10	Stevenage & Welwyn	200	4,007
11	Stevenage & Welwyn	171	3,428
Total		4,505	90,091

Source: Table 1 Appendix B

Claims on expenditure growth

5.12 As set out in the previous section, SFT such as online shopping has been removed from the baseline expenditure forecasts, in line with current forecasts of growth in this sector set out in Experian's Retail Planner Briefing Note 13.

5.13 In addition to SFT, account needs to be taken of new stores that have opened since the survey was undertaken; commitments for new retail floorspace (schemes implemented but not yet trading at the time of the household survey, or extant planning permissions which would result in additional retail floorspace); and sales density growth (which is the growth in turnover for existing retailers within the study area).

Recent openings

5.14 Since the survey was undertaken, the main change to the retail offer in Central Bedfordshire has been brought about by the opening of the new Morrisons store in Houghton Regis and the closure of the smaller existing Morrisons.

5.15 The new store has been factored in the updated capacity analysis as absorbing expenditure i.e. it is included within the turnover of Central Bedfordshire's floorspace. It should be noted that the market share and resultant turnover that was previously attributed to the closed Netto and Morrison's stores in Houghton Regis has been deducted from the projected turnover of the new Morrison's store.

Commitments

5.16 Commitments to new retail floorspace, identified by the Council are set out in Table 6 (Volume 2). These include retail permissions granted from 2013 which were not trading at the time that the study was undertaken. Table 6 identifies 12,000 sqm of committed convenience and 2,000 sqm of comparison floorspace which is taken in to account in the quantitative assessment. The figures in Table 6 represent the maximum quantum of floorspace that could be delivered as a result of the Council granting these permissions, however it is very likely that the amount of floorspace will be significantly less. First, a number of commitments are for flexible A1-A5 retail space, and it is likely that a significant amount of non-A1 floorspace will be delivered. Secondly, there is no guarantee that all of the permissions will be implemented

5.17 In the convenience sector, the majority of new convenience floorspace will be delivered within mixed-use residential developments. The majority of permitted schemes are for small convenience stores in local/neighbourhood centres and there are just two commitments for large-format convenience development across the Council area. This reflects the recent restructuring of the sector, as explained in section 3. The first large-format development is for a new 6,500 sqm supermarket at land north of Houghton Regis which is intended to provide the new residential population and surrounding communities with a main food shopping facility[7]. The second is for the conversion of an existing unit at White Lion Retail Park to accommodate a 1,112 sqm M&S Foodhall store[8].

5.18 In the comparison sector, there are two major commitments which account for the majority of floorspace. The first commitment is for 8,750 sqm comparison floorspace at land North of Houghton Regis. The development, as proposed, will provide two

[7] LPA ref: CBC/12/03613/OUT
[8]LPA ref CB/14/04371/FULL

new local centres, a supermarket (as set out above) and a mixed-use commercial hub.

5.19 The second major comparison commitment is for the development of a new out-of-town retail park, known as 'Grovebury Retail Park' off Grovebury Road, approximately 1.5km to the south of Leighton Buzzard centre. The planning application makes provision for 6,132 sqm comparison retail floorspace; however, the range of goods that can be sold from the units is restricted by S106 agreement to traditional bulky goods categories[9]. Although granted in 2012 the development has been delayed due to a failed High Court challenge to quash the Council's decision. The permission is due to expire on 14 November 2016.

5.20 The proposed refurbishment of the White Lion Retail Park is significant in that it will improve the quality of the retail park offer although a limited amount of net additional floorspace is proposed[10]. The proposals will improve the quality of the retail park which has suffered from vacancies in the past. The addition of larger refurbished units will be achieved through the addition of mezzanines and the diversity of the retail offer will be enhanced by the addition of a high-quality convenience store (M&S Foodhall).

5.21 The Council have received a planning application for a retail warehouse development although this has yet to be determined and therefore is not counted as a commitment in the quantitative assessment. EDS Holdings submitted proposals for the development of 6 non-food retail warehousing units providing 4,894 sqm comparison floorspace on land at Camden Site, Grovebury Road[11]. The site is located next to Grovebury Road Industrial Estate and is 0.75 km of south of Leighton Buzzard centre.

Sales density growth

5.22 Sales density growth (floorspace productivity or efficiency growth) is the amount of expenditure which is 'ring fenced' for existing floorspace to improve its turnover each year. Allowances for sales density growth are linked to expenditure growth; expenditure growth rates of 1.5% per annum have been applied respectively to the comparison sector from 2016 onwards.

5.23 Although different types of floorspace will have different abilities to absorb expenditure growth, with more modern floorspace being more able to accommodate growth than older floorspace. However, given there is a mix of floorspace types within the borough, this average approach is considered to be robust.

5.24 No allowance is made for convenience goods. This reflects the trends towards increasing competition between retailers, very limited growth in available convenience expenditure and the resulting almost static sales densities of the major retailers.

[9] LPA ref: CB/12/02071/OUT
[10] LPA ref: CB/14/04371/FULL
[11] LPA ref: CB/16/00814/OUT

Trading performance and quantitative capacity

Comparison goods

5.25 The CBRS examined the trading performance of Dunstable, Leighton Buzzard, Biggleswade and Sandy because, at the time of publication, these were the only centres in Central Bedfordshire covered by Experian GOAD data. Since then, Experian have published data for Ampthill; this update study therefore also includes Ampthill.

Table 5.4 Existing comparison sales densities in Central Bedfordshire centres

Centre	Turnover inc. inflow 2012 (2009 prices) (£m)	2012 sales density (2009 prices) (£/sqm)	Turnover inc. inflow 2016 (2014 prices) (£m)	2016 sales density (2014 prices) (£/sqm)
Ampthill			£5.66	2,866
Dunstable	£112.6	10,138	£114.47	13,977
Leighton Buzzard	£62.3	6,256	£69.67	7,727
Biggleswade	£59.0	11,695	£58.66	12,452
Sandy	£5.1	3,554	£5.16	4,525

Source: Table 6 Appendix B

5.26 Given this is an update study, it is unsurprising that the same conclusions as those set out in the CBRS remain valid. To summarise:

- The densities for Dunstable and Biggleswade are high but may have been inflated by respondents to the household survey incorrectly stating the town centre rather than the out-of-centre retail parks;
- Leighton Buzzard is trading well and could suggest some degree of pent up spending;
- Sandy is trading well for a small centre.

5.27 In addition, Ampthill is performing less strongly than Sandy despite being a larger centre. However, this may be due to the type of comparison offer which is focused on bulkier and therefore lower value comparison goods.

5.28 For the purposes of capacity modelling, it is assumed that, as with the CBRS, the existing floorspace is trading at equilibrium in 2016. This has been cross-checked with the updated health checks undertaken.

5.29 The table below sets out projected comparison capacity across the study period.

Table 5.5: Comparison capacity 2016-35

	Residual expenditure (£m)	Net floorspace requirement (sqm)	Gross floorspace requirement (sqm)
2016	-£119.1	-	-
2021	-£95.2	-	-
2026	-£45.0	-	-
2031	£23.1	3,127	4,467
2035	£95.0	11,927	17,038

Source: Table 8 Appendix B

5.30 This shows that comparison goods need only starts to emerge at the very end of the plan period. This is largely because of the existing comparison commitments detailed earlier in this section which will absorb more than the projected increase in available comparison expenditure.

5.31 The implications are considered further in Section 7.

Convenience goods

5.32 The CBRS found that there was substantial quantitative overtrading within the convenience offer in Central Bedfordshire. This continues to be the case as available expenditure has increased since the CBRS was undertaken.

5.33 Table 11 (Appendix B) shows that quantitative overtrading totals £210m in 2016. While this may have been tempered to some degree by the opening of the new Morrison's in Houghton Regis, as set out above, we have made allowance for this elsewhere in the capacity analysis but assume that that store is trading in line with company benchmark.

5.34 Overtrading in isolation should be treated with caution because, in quantitative terms, it is simply a product of company average benchmarks. The company averages are derived from a wide portfolio of stores which necessarily includes stores which trade at levels both above and below average, depending on a number of factors, including the age of the stores, the competing stores, the available expenditure within the catchment of those stores etc. Quantitative overtrading should therefore be considered in the context of qualitative indicators such as overcrowding and congestion, out of stocked items etc.

5.35 As with the CBRS, we set out convenience goods need with and without overtrading in the table below.

Table 5.6: Convenience capacity 2016-35

	Without overtrading		With overtrading		
	Residual expenditure (£m)	Net floorspace requirement (sqm)	Residual expenditure (£m)	Net floorspace requirement (sqm)	Gross floorspace requirement (sqm)
2016	-£127.27	0	£90.46	8,638	12,340
2021	-£109.87	0	£107.86	10,300	14,714
2026	-£92.69	0	£125.04	11,940	17,057
2031	-£75.12	0	£142.61	13,618	19,454
2035	-£59.29	0	£158.43	15,129	21,613

Source: Table 12 Appendix B

5.36 The implications of these are considered in Section 7.

Summary

5.37 This section provides a comprehensive update on our previous review of quantitative need. In doing this, we use population projections that align with anticipated housing delivery across the plan period and, based on this growing population, adopt a constant market share approach to both convenience and comparison provision.

5.38 Taking into account the scale of commitments in the form of particularly urban extensions but also two large out-of-centre retail parks, this means that there is no capacity for new comparison floorspace in the short to medium term.

5.39 In relation to convenience goods, if it is assumed that existing floorspace is trading at equilibrium, there is need to plan for further floorspace within Central Bedfordshire. However, there is substantial quantitative overtrading which needs to be viewed in the context of qualitative indicators in order to understand whether or not this should be factored into the Council’s planning policies.

5.40 The floorspace requirements presented above should be reviewed regularly over the study period to account for changes in a number of variables including revisions to national expenditure forecasts, improvements in competing destinations. Specifically, long-term projections beyond 2021 should be treated as indicative only.

6 QUALITATIVE RETAIL NEEDS

Introduction

6.1 To shape the qualitative recommendations, the CBRS drew on on-street visitor surveys carried out in the town centres. The CBRS concluded that there was 'a qualitative need for new retail provision in Central Bedfordshire. In relation to the individual centres, the CBRS stated that:

- *'Leighton Buzzard is an attractive town and is performing well with a high level of turnover and a low vacancy rate. It has a good choice of independent comparison and convenience outlets, as well as some national multiples. It also has a good range of service uses. There are two development opportunities – Land South of the High Street (where new retail development is planned) and Bridge Meadow.*
- *Dunstable has a good convenience and service offer, but the comparison offer is weaker. There is a concentration of vacant units in the Quadrant Shopping Centre, indicating that demand from retailers is not particularly strong at present. However, there is a masterplan for redevelopment in Dunstable, to include the Quadrant, where new retail space will be provided to strengthen the town.*
- *Biggleswade has a good convenience and service offer; its comparison offer is weaker but this is to be expected given its size and role in the retail hierarchy. The vacancy rate in the town centre is low, suggesting strong performance.*
- *Sandy is a small centre with a good range of convenience and service provision, and a low vacancy rate.*
- *Ampthill is an attractive, historic town with a good range of independent comparison, convenience and service outlets, and a low vacancy rate.*
- *Flitwick is a small centre with adequate convenience and service provision but limited comparison provision. It is a disjointed town centre with no retail core – although the Council are progressing plans to address this.*
- *Houghton Regis is a very small centre with basic convenience and service provision. There is a masterplan for the centre which identifies the Co-op site for mixed use development.'*

6.2 In the section, we review those conclusions in light of the health checks undertaken in support of this update.

Existing town centres

Leighton Buzzard

6.3 The health check of the centre indicated that it was performing well. Although the vacancy rate has risen slightly since the CBRS was written, it remains below the national average. We consider that while the centre is healthy, we remain of the view that it would benefit from enhancement of the food and drink offer to drive footfall and increase dwell times.

6.4 There are a number of commitments in Leighton Buzzard; however, these are largely for out-of-centre developments so will not improve the retail offer within the town centre. We are not aware of any progress on either of the allocated town centre sites.

Dunstable

6.5 The weak comparison offer was a specific finding of our previous qualitative analysis. It remains the case now; indeed, the comparison offer has reduced further so that it remains below national average.

6.6 Vacancy levels in Dunstable are higher than the national average. We previously noted that there was a concentration of vacancies in the Quadrant Centre; from our recent health check, this remains the case. As a managed shopping centre in a single ownership, the persistent vacancies in the Quadrant points to subdued retailer demand for representation in Dunstable. This could in part be related to the commitment for the reconfiguration of White Lion Retail Park which is likely to be more commercially attractive to operators and is likely to, once completed, improve the comparison retail offer in Dunstable more widely, albeit not in the town centre.

6.7 We therefore continue to advocate policies which seek to bolster the vitality and viability of the centre, particularly given the extant permission at White Lion Retail Park which, if implemented and the retail offer widened to accommodate retailers that would compete more readily with the town centre, could divert shoppers from the centre to the detriment of overall vitality and viability.

Biggleswade

6.8 The CBRS identified the somewhat weaker comparison offer. While this has not changed substantially since that study was published, we consider the centre been performing well and not showing any significant qualitative deficiencies.

Other centres

6.9 Ampthill, Flitwick and Sandy continue to perform in line with their role and function. Our health checks do not point to any major qualitative deficiencies in terms of retail offer. The main area for qualitative improvement relates to the physical configuration of Flitwick rather than the nature of the retail offer.

6.10 As set out in Section 4, there has been substantial investment in Houghton Regis with the opening of the new Morrison's supermarket, and the future development of the former Co-op site. This has substantially bolstered the role of the centre; however, our health check indicates that the rest of the centre remains quiet. While it is recognised that the proximity of Houghton Regis to Dunstable will limit its function, there is clear scope to enhance the retail service offer in the centre to cater to the everyday needs of people visiting the in-centre Morrison's.

Convenience provision

6.11 As noted in the preceding section, most of the larger foodstores within Central Bedfordshire are quantitatively overtrading.

6.12 The benchmark turnover is the turnover the store would be expected to achieve if trading at company average turnover per sqm rates. Overtrading refers to the performance of centres and stores within a catchment in relation to the expected benchmark turnovers. Overtrading can also be assessed through qualitative indicators such as overcrowding and congestion in stores. As such, overtrading is both a quantitative and qualitative indicator of need. Although benchmarking is reliant on the use of operator average data in terms of the split between convenience and comparison goods floorspace within the stores (except in some stores where we have adjusted this based on our site visits to stores), and is based on national average sales densities, it nevertheless provides a robust, and industry-accepted, method of assessing current trading performance.

6.13 The fact that the recorded level of quantitative overtrading is so widespread across the stores does point towards the need for additional floorspace in Central Bedfordshire. If allowance is made for overtrading in the base year, this would generate capacity during the plan period for convenience floorspace.

6.14 However, it should be noted that since the CBRS was published planning permission has lapsed for a significant extension to the Tesco at Dunstable which is recorded as trading at over 200% of benchmark level. As set out in Section 2, the convenience market has changed structurally in the last few years but if the decision was taken not to implement an extension at a store which is seemingly trading at a level hugely above that anticipated, it implies that the qualitative symptoms are not as pronounced as the numbers might suggest.

6.15 As part of this update, we visited a number of the stores and consider that while at the time of visiting they appeared to be well used, they did not appear to be chronically overtrading. Accordingly, as we advised in CBRS, it remains a policy choice if the Council wishes to fact in overtrading in the base year in planning for convenience capacity over the plan period.

6.16 Based on the evidence before us, we do not think there any specific need to take account of overtrading in qualitative terms. And the Council may choose not to make an allowance for overtrading in the base year in identifying need across the plan period. Because a demonstration of need is no longer a requirement in national policy terms, this would not preclude applications for convenience-led development being considered on their own merits.

Urban extensions

6.17 It should be noted that the previous study did not consider implications of the various urban extensions which are envisaged in adopted policy (both development plan and supplementary) and are now, in some cases, subject to planning permission. The most notable of these is the Houghton Regis North development which includes a substantial quantum of retail and other town centre uses, including leisure, as part of the permission.

6.18 These commitments account for a significant proportion of the claims on expenditure, particularly with regard to convenience. We consider this entirely appropriate but note that the Council must have regard to the function of their existing centres as well in planning for these developments.

7 COMMERCIAL LEISURE ASSESSMENT

7.1 This section provides a summary of the scope for additional commercial leisure and other town centre uses which can be supported in Central Bedfordshire. The findings are informed by an assessment of the growth of expenditure on leisure goods spending which is expected to come forward in the study area over the period to 2035, supported by the findings of the household survey of shopping and leisure patterns. The comments set out in this section should be read in conjunction with the leisure expenditure tables set out in Appendix B.

7.2 As with the CBRS, this expenditure growth is set out over the long terms and over the whole study area. It does not provide a detailed analysis of each category but instead focuses on the potential areas of growth.

Method

7.3 Experian provide 2014-based per capita spending on the following key commercial leisure sectors:

- Accommodation services (e.g. hotels, room hire);
- Cultural services (e.g. cinema, theatre, museums, TV subscriptions);
- Games of chance (e.g. lottery, bingo, bookmakers);
- Hairdressing salons and personal grooming/beauty establishments;
- Recreational and sporting services; and
- Restaurants and cafes

7.4 For the purposes of this update, we have adopted the same categories as those used in the CBRS, namely: recreation and cultural services (incorporating Experian categories cultural services, games of chance and recreational and sporting services); restaurants and cafes; hotels (Experian category accommodation services but excluding holidays abroad); and hair and personal grooming (hairdressing salons and person grooming/beauty establishments).

Need for new leisure development

7.5 By applying the per capita figure to the projected population (SHMA-based growth) and expenditure growth (ERPBN) in the study area, the amount of total expenditure growth in each of these sectors can be identified. This is summarised in Table 7.1.

Table 7.1: Summary of growth in commercial leisure sectors to 2035 (£M)

Spending (£m)	2016	2021	2026	2031	2035	Growth 2016-35
Recreation and cultural services	£370.16	£410.57	£455.27	£504.75	£547.75	£177.59

Spending (£m)	2016	2021	2026	2031	2035	Growth 2016-35
Restaurants and cafes etc.	£707.95	£785.36	£871.00	£965.78	£1,048.15	£340.20
Hotels (accommodation services)	£101.25	£112.31	£124.54	£138.08	£149.84	£48.59
Hair and personal grooming	£62.52	£69.35	£76.90	£85.26	£92.53	£30.00

Source: Table 13 Appendix B

7.6 Table 7.1 shows that the majority of growth will come forward in the restaurants and cafes sector, increasing by £340m over the study period. As with the retail sector, it is possible to assess patterns of commercial leisure spending through the household survey of spending patterns which was undertaken in support of this study. An estimate of the quantitative need for new food and drink (Class A3-5) floorspace can also be forecast.

7.7 In relation to Central Bedfordshire, the table below sets out growth across the study period.

Table 7.2: Growth in commercial leisure sectors in Central Bedfordshire

Available spending (£m)	2016-35
Recreation and cultural services	£88.98
Restaurants and cafes etc.	£168.54
Hotels (accommodation services)	£25.28
Hair and personal grooming	£15.57

Source: Table 13 Appendix B

7.8 Table 14 (Appendix B) looks specifically at food and drink uses (A3-5). This indicates that there is capacity for a further 8,480 sqm of these uses across the plan period, albeit, as with retail development, we recommend the longer-term forecasts are viewed with caution.

Conclusion

7.9 The leisure offer within Central Bedfordshire's town centres is focused on the food and drink sector; this is largely a product of their roles of meeting day-to-day needs. While change has been relatively limited since 2012, there has been a shift in some of the centres towards A3 uses rather than A4 and A5. This is symptomatic of wider trends towards more coffee shops and restaurants being seen as an integral part of the town centre offer. This is considered a positive shift as they increase dwell times and generally do not have the potential negative side effects associated with hot food takeaways, in terms of health impacts.

7.10 In relation to other leisure uses, there are relatively few theatres and no purpose-built cinemas. This does not necessarily mean that that there is a qualitative deficiency. Uses such as these are generally found in larger town centres because they need a larger pool of available expenditure to maintain them. In this case, the administrative boundaries are such that the centres where these facilities are provided but those centres are located outwith Central Bedfordshire in for example Milton Keynes and Bedford. Again the geography means that these are accessible to Central Bedfordshire's residents. This, combined with the lack of evidence of market demand from operators, means that there is no need to plan for additional facilities within the new Local Plan.

8 CONCLUSIONS AND RECOMMENDATIONS

Introduction

8.1 This study has been prepared as an update to the CBRS which informed the withdrawn Development Strategy. In concluding this update study, we refer to the recommendations of the CBRS.

Need for new floorspace

8.2 The NPPF (para. 161) requires evidence on quantitative and qualitative needs for retail development over the plan period. Quantitative need refers to how much floorspace is required whereas qualitative need introduces a requirement to consider what type of floorspace is required. Both elements have been considered in order to understand policy formulation.

8.3 The CBRS identified need for 34,575 sqm (net) of comparison goods floorspace in the period to 2031. Half of this projected need was to be provided in Dunstable, the residual 50% split between Leighton Buzzard (20%), Biggleswade (20%) and the smaller centres (10%). This assumed that the Council should plan for increased market share by improving the retail offer.

8.4 With regard to convenience goods, the CBRS identified need of 3,170 sqm (net) over the same period; this increased to 15,175 sqm (net) if overtrading in the base year was taken into account. In relation to food and drink (A3-A5 uses), need for a further 4,975 sqm (gross) was identified.

8.5 As set out in the preceding sections, having regard to the prevailing trends in the retail and leisure sector towards polarisation of town centres, it is considered that planning for increased market share is no longer an appropriate strategy for the Council to pursue. Central Bedfordshire is located between a number of large town centres which are highly accessible to residents and will continue to limit the proportion of expenditure retained within the authority area.

8.6 Since the CBRS was undertaken, the developments that have taken place within Central Bedfordshire's town centres has been limited largely to conversion of existing floorspace into leisure uses. Analysis of the comparison goods commitments show that these are dominated by out-of-centre schemes, although it is unclear when these are likely to be delivered. This is contrasted by large-scale planned investment outside Central Bedfordshire in Milton Keynes town centre. This serves to illustrate the continued hesitance in the market to invest in smaller town centres such as those in Central Bedfordshire.

8.7 Added to these trends in the market, it is relevant that a large proportion of additional available expenditure is expected to come from new population in Central Bedfordshire, including a number of urban extensions. It is clear from analysis of the commitments that the amount of floorspace planned as part of new local centres in these urban extensions is not insubstantial; indeed, in the context of overall delivery of comparison retail floorspace in Central Bedfordshire in the last five years, these commitments are significantly larger.

8.8 A summary of the quantitative need for retail and commercial leisure (A3-5) floorspace in Central Bedfordshire is set out in the table below.

Table 8.1 Summary of quantitative need to 2035

	2016	2021	2026	2031	2035
Comparison goods (sqm net)	0	0	0	3,127	11,927
Convenience goods (sqm net)	0	0	0	0	0
Food and drink uses (sqm gross)	0	1,991	4,148	6,488	8,480

Source: Appendix B

8.9 Section 5 identified that comparison need will only emerge by the end of the plan period; however, as we noted in the same section, we recommend that caution is exercised in planning for new retail floorspace beyond 2021.

8.10 In relation to convenience need, as set out in Sections 5 and 6, this is highly dependent on the treatment of overtrading within the existing floorspace. It is for the Council to decide whether they wish to factor in overtrading in the base year and so trigger a requirement to plan for further convenience floorspace.

8.11 Having reviewed existing convenience provision, we do not think there is a pressing need to alleviate any potential overtrading through new floorspace. Given the structural changes to the convenience market since the CBRS was published and the now broadly constant level of per capita convenience spending, we consider this a reasonable approach for the Council to adopt.

8.12 As we set out in the CBRS, we considered that convenience provision might be appropriate within the urban extensions at North Luton, North Houghton Regis, Wixams and East Leighton Linslade. This aligns with the provisions made in supplementary planning policy for new convenience provision as part of urban extensions, much of which has already been factored into this capacity assessment in the form of committed floorspace/investment. We remain of the view that local-scale shopping opportunities and town centre uses should be provided in these locations.

8.13 In relation to leisure uses, there is evidence of increasing capacity for new A3-5 floorspace within Central Bedfordshire across the plan period to the region of 8,480 sqm to 2035. Again though, we would recommend caution when planning for forecasts over a 20-year period, particularly because often A3-5 uses are often delivered through the conversion of existing town centre floorspace.

8.14 Given the structural shift in town centres and the need for physical floorspace to compete with an online offer, we remain of the view we expressed in the CBRS that A3-5 uses in town centres make them more attract and vital, by increasing dwell times and lengthening the hours of operation. We therefore think that the Council should support these uses within their centres, particularly the Principal town centres.

8.15 It should be noted that although there is no need to allocate sites to meet growth across the plan period, plainly this does not preclude the Council from considering applications on their own merits, in the context of the development plan. Retail and other main town centres are accepted in principle by the NPPF if applications come forward in identified town centres, without recourse the sequential or impact assessments. In relation to such uses coming forward in outside identified town centres, the NPPF is clear in directing local authorities to support applications for sustainable development; judging whether this is the case is dependent on local circumstances and it will for the Council decide.

Policy recommendations

8.16 As set out in Section 2, the withdrawn Development Strategy had four policies which focused on town centre policies. We set out our recommendations below in the context of those draft policies, which we use as a ‘starting point’ and set out suggested amendments to those policies in Appendix C.

Retail hierarchy and boundaries

8.17 The NPPF requires the definition of a network and hierarchy of centres that is resilient to anticipated future economic change. Table 7.1 of the withdrawn Development Strategy sought to define four different types of centre: principal, secondary, minor service and large villages. This update study does not consider the two lowest types of centre; we therefore only comment on the draft principal and secondary centres.

- Principal town centres: we agree that Leighton Buzzard, Dunstable and Biggleswade should form the upper tier of town centres in Central Bedfordshire.
- Secondary town centre: we agree that Ampthill, Flitwick, Houghton Regis and Sandy should act as the second tier of centre given their scale and offer. We do not consider it appropriate to include Wixams in this category given the development has yet to come forward but recognise that this may change over the plan period as development progresses; the Council should therefore keep this designation under review.

8.18 There are no longer any formal definitions of what town centres should contain following the revocation of PPS4. However, we consider that it remains a useful starting point for how Central Bedfordshire might define the roles of the different centres. We have also referred to the definitions set out in the withdrawn Development Strategy. As such, we suggest that the following definitions:

- Principal town centres: will function as important service centres, providing a range of facilities, including national multiple and independent convenience and comparison retailers, and a wide range of non-retail and leisure services, for extensive rural catchment areas.

- Secondary town centres: will comprise groups of shops often containing at least one supermarket[12] or superstore[13], and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.

8.19 While we have not been asked to assess the lower order centres within Central Bedfordshire, comprising the minor service centres and large villages, we consider that the definition of local centres provided in the revoked PPS4 would be appropriate. For ease of reference, that definition is repeated here:

> *'Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.'*[14]

8.20 The NPPF requires local authorities to define the extent of town centres and primary shopping areas, based on a clear designation of primary and secondary frontages in designated centres. We set out in Appendix D the recommended primary shopping area boundaries in the town centres.

8.21 The recommended boundaries involve some modifications from those currently in place which were adopted in 2004 (for those centres which were previously in South Bedfordshire) and 2011 (for those centres previously in Mid Bedfordshire). Since these boundaries were defined, the adoption of the NPPF has meant that there are now nationally-consistent definitions for what constitutes both the primary shopping area and town centre boundaries; these, together with the findings of our health checks, have informed our recommended boundaries.

8.22 We have defined primary shopping areas and town centre boundaries for the principal town centres; however, for the secondary centres we have identified a single boundary which we consider should act as both the primary shopping area and town centre boundary. This reflects the fact that in the larger centres, there is a need to deliver a more focused retail core, whereas in the smaller centres the distinction between the retail, service and leisure offer is often more blurred, suggesting a more flexible approach to uses within those centres would be beneficial to vitality and viability.

8.23 In the case of the former South Bedfordshire centres (Dunstable, Leighton Buzzard and Houghton Regis), the passage of 12 years has had some impact on the commercial geography of the town centres. Similarly, for those other towns in Central Bedfordshire, there have been some changes since 2011 which we need to consider. Specifically, in relation to the main centres:

- Dunstable: we are proposing a broader town centre boundary than previously to incorporate the town's leisure and education quarter that has been developed

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[12] Defined as less than 2,500 sqm net

[13] Defined as greater than 2,500 sqm net

[14] Planning Policy Statement 4 Annex B Definitions p. 37

since the previous boundaries were adopted. White Lion Retail Park remains outside the defined town centre because of the separation between it and the established town centre; this is to ensure that any future growth at the retail park is subject to control from CBC i.e. that any applications can be considered on their merits in the context of local and national tests on the potential impact on Dunstable. The primary shopping area for the centre remains largely unchanged.

- Leighton Buzzard: while we reviewed the retail parks outside the town centre boundary, we do not recommend amending the boundaries to include them because they remain relatively separate.
- Houghton Regis: since the previous plan was adopted, there has been development to the south of the High Street; the primary shopping area boundaries have been amended to reflect this.
- Biggleswade: there has been modest contraction of the primary shopping area to reflect changes of use away from A1.

Development management policies

8.24 The NPPF is clear in its requirement for the sequential test to be applied and impact assessment to be undertaken when considering applications for main town centres uses that are not in an existing centre and not consistent with an up-to-date Local Plan. However, the NPPF also provides local authorities with flexibility to set its own policies ‘for the consideration of proposals for main town centre uses that are not in an existing centre and not in accordance with an up-to-date Local Plan. In PBA’s view, the Council should take this opportunity to set its own policies taking into account some of the local circumstances we have identified in this study.

8.25 The established NPPF tests for a sequential test and impact assessment should be included in policy, as set out in paragraphs 24 and 26 in the NPPF. However, it is also considered that a further local impact test should be introduced into policy. Thus, as well as the NPPF impact test, the policy should require impact assessments for proposals outside town centres to consider the following:

- The extent to which the market profile of the development proposed will compete with existing facilities in town centres
- The potential for relocation of businesses currently trading in town centre to locations out of centre
- The impact on linked trip spending between different town centre uses or businesses
- The cumulative effect of more than one development coming forward at the same time
- The impact through trade diversion on the role and function of a town centre

8.26 Finally, it is appreciated that the NPPF provides an opportunity to set a local impact threshold (with the default being 2,500 sqm). Given the scale of the rural centres, it is recommended that zero threshold should be applied i.e. all proposals outside those centres would be subject to a proportionate level of impact testing.

8.27 The withdrawn Development Strategy included a local impact threshold of 500 sqm GEA. We consider that this remains an appropriate threshold for the new Local Plan.

8.28 It will be important that policy is drafted to ensure clarity on where the threshold applies. The threshold should be based on the nearest centre to the site in question. To avoid cumulative developments that exceed this threshold, it is considered that an impact assessment should be required if the threshold is breached in any one year by more than one planning application.

8.29 It is noted that current development plan policy includes a number of development management controls on frontage composition within the primary and secondary shopping frontages in the town centres. It is not recommended that such controls are retained within Local Plan policy for two key, and interlinked, reasons: wider market shifts as to the role of retail within town centre and the permitted development regime that is currently in place.

8.30 As set out in Section 2, there is a drive towards greater flexibility in the planning system to support high streets, particularly to enable a faster response to the wider retail which have meant that there is an oversupply of retail floorspace that is not fit for purpose and that there is increased demand for retail services and leisure floorspace within town centres.

8.31 The permitted development regime therefore now allows, subject to prior approval from the local planning authority, the conversion of existing retail and financial service (Use Classes A1 and A2) floorspace into food and drink (Use Classes A3 to A5) uses, leisure uses (Use Class D2) and residential (Use Class C3). Whilst it is acknowledged that these rights are subject to floorspace caps, given the typical unit sizes within Central Bedfordshire, the majority of retail floorspace within the centre would be below the upper threshold. This is material when considering the effectiveness of a policy which sought to retain the degree of restriction imposed by the current development plan policies.

8.32 Furthermore, it should be noted that under the prior approval process, the development plan is not a material consideration; instead, local authorities are obliged to consider whether the loss of existing use would have an ‘undesirable impact’ on the provision of that type service/use and/or if, located within a key shopping area, the sustainability of that shopping area. In addition, it is important to note that ‘key shopping area’ as set out in the GPDO 2015 is not the same as any of the NPPF definitions of town centre, primary shopping area or shopping frontages. Similarly, the definition of ‘undesirable impact’ is not specified so is considerably more wide ranging than the ‘significant adverse impact’ set out in the NPPF providing CBC with powers to consider prior approval applications on a case-by-case basis.

8.33 As such, given the focus of the NPPF on ensuring the vitality and viability of town centres, PBA consider that allowing flexibility within the town centre is critical to ensuring its longer-term health and imposing controls on the proportion and concentration of A1 uses within the centre would fail to recognise the current trends and issues faced by town centre and so would not assist in achieving this objective.

Monitoring recommendations

8.34 This study provides CBC with its floorspace needs requirements to 2035. To establish whether the requirements for new floorspace (by type) are being met and more generally to monitor the performance, CBC should monitor:

- planning permissions for retail floorspace - by type, amount (sqm gross and net), location and retailer. This should include monitoring when unimplemented planning permissions expire;
- completions of retail floorspace - by type, amount, location and retailer;
- mix of uses, including vacancies; and
- health checks of designated centres

8.35 The monitoring recommended above is relatively straightforward and should be conducted on a rolling basis for the first two items and annually or every two years for the latter two items. Time series data can thus be produced and continually updated, starting with this study or possibly with earlier work undertaken by CBC. Contingent on the timetabling of the Local Plan, such updating will prove to be valuable when this evidence is tested at examination in public.

8.36 This report provides a robust indication of the current position. The recommendations set out in this report may need to be adjusted, in the future, due to changing market conditions, demographic changes and the impact of developments elsewhere. They may also need to be adjusted if standard assumptions, in particular those relating to expenditure growth and e-tailing, change. The role of monitoring is crucial in highlighting changes in the assumptions that underpin this study and we recommend regular monitoring to the Council.

APPENDIX A GOAD UPDATES

Leighton Buzzard Town Centre GOAD Update May 2016										
			UNITS	%	% UK	Dif.	SQM	%	% UK	Dif.
Convenience	Bakers	G1a	5	2.23	2.16	0.07	340	1.05	1.09	-0.04
	Butchers	G1b	1	0.45	0.75	-0.30	190	0.59	0.40	0.19
	Greengrocers & Fishmongers	G1c	0	0.00	0.64	-0.64	0	0.00	1.37	-1.37
	Groceries and Frozen Food	G1d	7	3.13	2.96	0.17	6920	21.32	12.91	8.41
	Officences & Home Brew	G1e	1	0.45	0.48	-0.03	290	0.89	0.30	0.59
	CTN & Convinience	G1f	3	1.34	2.25	-0.91	70	0.22	2.25	-2.03
	Total Convenience		**17**	**7.59**	**9.22**	**-1.63**	**7810**	**24.06**	**18.32**	**5.74**
Comparison	Footwear & Repairs	G2a	3	1.34	1.69	-0.35	190	0.59	1.23	-0.64
	Mens & boys wear	G2b	1	0.45	0.93	-0.48	40	0.12	0.83	-0.71
	Womens, girls & childrens wear	G2c	7	3.13	3.19	-0.06	740	2.28	3.08	-0.80
	Mixed & general clothing	G2d	8	3.57	4.01	-0.44	1170	3.60	6.34	-2.74
	Furniture, carpets & textiles	G2e	11	4.91	3.32	1.59	1670	5.14	3.64	1.50
	Books, arts/craft, stationary	G2f	15	6.70	4.19	2.51	1020	3.14	3.08	0.06
	Elec, home ent, phones,video	G2g	2	0.89	3.57	-2.68	300	0.92	2.52	-1.60
	DIY, hardware & household	G2h	6	2.68	2.39	0.29	1310	4.04	4.79	-0.75
	Gifts, china, glass & leather goods	G2i	5	2.23	1.70	0.53	410	1.26	0.90	0.36
	Cars, motor cycles & accessories	G2j	2	0.89	1.14	-0.25	900	2.77	1.77	1.00
	Chemists, toiletries & opticians	G2k	12	5.36	3.89	1.47	2460	7.58	3.91	3.67
	Variety, department & catalogue	G2l	1	0.45	0.61	-0.16	340	1.05	6.27	-5.22
	Florists & gardens	G2m	2	0.89	0.85	0.04	110	0.34	0.39	-0.05
	Sports, toys, cycles & hobbies	G2n	6	2.68	2.00	0.68	610	1.88	2.27	-0.39
	Jewellers, clocks & repairs	G2o	4	1.79	1.94	-0.15	320	0.99	0.91	0.08
	Charity, pets & other	G2p	12	5.36	4.36	1.00	1290	3.97	3.04	0.93
	Total Comparison		**97**	**43.30**	**39.75**	**3.55**	**12880**	**39.68**	**44.95**	**-5.27**
Services	Restaurant, cafés, fast food	G3a	35	15.63	17.01	-1.39	4270	13.15	12.54	0.61
	Hairdressing, beauty & health	G3b	29	12.95	10.12	2.83	1680	5.18	4.89	0.29
	Laundrettes & dry cleaners	G3c	2	0.89	0.89	0.00	240	0.74	0.40	0.34
	Travel agents	G3d	2	0.89	1.06	-0.17	170	0.52	0.66	-0.14
	Banks & financial services	G3e	7	3.13	3.99	-0.87	1340	4.13	4.27	-0.14
	Building societies	G3f	2	0.89	0.51	0.38	280	0.86	0.41	0.45
	Estate agents & auctioneers	G3g	12	5.36	3.94	1.42	1160	3.57	2.20	1.37
	Total Service		**54**	**24.11**	**20.51**	**3.60**	**4870**	**15.00**	**12.83**	**2.17**
Misc.	Employment, careers, PO & info	G4a	1	0.45	1.18	-0.73	350	1.08	1.01	0.07
Vacant	Vacant	G4b	20	8.93	12.33	-3.40	2280	7.02	10.34	-3.32
Totals			**224 Units**				**32460 sqm**			

Dunstable Town Centre GOAD Update May 2016

			UNITS	%	% UK	Dif.	SQM	%	% UK	Dif.
Convenience	Bakers	G1a	5	2.03	2.16	-0.13	320	0.74	1.09	-0.35
	Butchers	G1b	1	0.41	0.75	-0.34	140	0.32	0.40	-0.08
	Greengrocers & Fishmongers	G1c	1	0.41	0.64	-0.23	80	0.18	1.37	-1.19
	Groceries and Frozen Food	G1d	9	3.66	2.96	0.70	9740	22.45	12.91	9.54
	Officences & Home Brew	G1e	0	0.00	0.48	-0.48	0	0.00	0.30	-0.30
	CTN & Convinience	G1f	12	4.88	2.25	2.63	1420	3.27	2.25	1.02
	Total Convenience		**28**	**11.38**	**9.22**	**2.16**	**11700**	**26.97**	**18.32**	**8.65**
Comparison	Footwear & Repairs	G2a	4	1.63	1.69	-0.06	350	0.81	1.23	-0.42
	Mens & boys wear	G2b	1	0.41	0.93	-0.52	100	0.23	0.83	-0.60
	Womens, girls & childrens wear	G2c	6	2.44	3.19	-0.75	930	2.14	3.08	-0.94
	Mixed & general clothing	G2d	7	2.85	4.01	-1.16	1180	2.72	6.34	-3.62
	Furniture, carpets & textiles	G2e	4	1.63	3.32	-1.69	300	0.69	3.64	-2.95
	Books, arts/craft, stationary	G2f	5	2.03	4.19	-2.16	700	1.61	3.08	-1.47
	Elec, home ent, phones,video	G2g	12	4.88	3.57	1.31	1130	2.60	2.52	0.08
	DIY, hardware & household	G2h	3	1.22	2.39	-1.17	3160	7.28	4.79	2.49
	Gifts, china, glass & leather goods	G2i	3	1.22	1.70	-0.48	440	1.01	0.90	0.11
	Cars, motor cycles & accessories	G2j	1	0.41	1.14	-0.73	80	0.18	1.77	-1.59
	Chemists, toiletries & opticians	G2k	12	4.88	3.89	0.99	1960	4.52	3.91	0.61
	Variety, department & catalogue	G2l	2	0.81	0.61	0.20	1760	4.06	6.27	-2.21
	Florists & gardens	G2m	1	0.41	0.85	-0.44	100	0.23	0.39	-0.16
	Sports, toys, cycles & hobbies	G2n	2	0.81	2.00	-1.19	270	0.62	2.27	-1.65
	Jewellers, clocks & repairs	G2o	3	1.22	1.94	-0.72	440	1.01	0.91	0.10
	Charity, pets & other	G2p	10	4.07	4.36	-0.29	1720	3.96	3.04	0.92
	Total Comparison		**76**	**30.89**	**39.75**	**-8.86**	**14620**	**33.70**	**44.95**	**-11.25**
Services	Restaurant, cafés, fast food	G3a	38	15.45	17.01	-1.56	4870	11.23	12.54	-1.31
	Hairdressing, beauty & health	G3b	32	13.01	10.12	2.89	2490	5.74	4.89	0.85
	Laundrettes & dry cleaners	G3c	3	1.22	0.89	0.33	170	0.39	0.40	-0.01
	Travel agents	G3d	0	0.00	1.06	-1.06	0	0.00	0.66	-0.66
	Banks & financial services	G3e	9	3.66	3.99	-0.33	2280	5.26	4.27	0.99
	Building societies	G3f	1	0.41	0.51	-0.10	190	0.44	0.41	0.03
	Estate agents & auctioneers	G3g	11	4.47	3.94	0.53	1130	2.60	2.20	0.40
	Total Service		**56**	**22.76**	**20.51**	**2.25**	**6260**	**14.43**	**12.83**	**1.60**
Misc.	Employment, careers, PO & info	G4a	7	2.85	1.18	1.67	620	1.43	1.01	0.42
Vacant	Vacant	G4b	41	16.67	12.33	4.34	5310	12.24	10.34	1.90
Totals			**246 Units**				**43380 sqm**			

Houghton Regis Town Centre GOAD Update May 2016

			UNITS	%	% UK	Dif.
Convenience	Bakers	G1a	1	3.70	2.16	1.54
	Butchers	G1b	1	3.70	0.75	2.95
	Greengrocers & Fishmongers	G1c	0	0.00	0.64	-0.64
	Groceries and Frozen Food	G1d	1	3.70	2.96	0.74
	Officences & Home Brew	G1e	1	3.70	0.48	3.22
	CTN & Convinience	G1f	2	7.41	2.25	5.16
	Total Convenience		**6**	**22.22**	**9.22**	**13.00**
Comparison	Footwear & Repairs	G2a	0	0.00	1.69	-1.69
	Mens & boys wear	G2b	0	0.00	0.93	-0.93
	Womens, girls & childrens wear	G2c	0	0.00	3.19	-3.19
	Mixed & general clothing	G2d	0	0.00	4.01	-4.01
	Furniture, carpets & textiles	G2e	1	3.70	3.32	0.38
	Books, arts/craft, stationary	G2f	1	3.70	4.19	-0.49
	Elec, home ent, phones,video	G2g	0	0.00	3.57	-3.57
	DIY, hardware & household	G2h	2	7.41	2.39	5.02
	Gifts, china, glass & leather goods	G2i	0	0.00	1.70	-1.70
	Cars, motor cycles & accessories	G2j	3	11.11	1.14	9.97
	Chemists, toiletries & opticians	G2k	2	7.41	3.89	3.52
	Variety, department & catalogue	G2l	0	0.00	0.61	-0.61
	Florists & gardens	G2m	0	0.00	0.85	-0.85
	Sports, toys, cycles & hobbies	G2n	0	0.00	2.00	-2.00
	Jewellers, clocks & repairs	G2o	0	0.00	1.94	-1.94
	Charity, pets & other	G2p	1	3.70	4.36	-0.66
	Total Comparison		**10**	**37.04**	**39.75**	**-2.71**
Services	Restaurant, cafés, fast food	G3a	5	18.52	17.01	1.51
	Hairdressing, beauty & health	G3b	3	11.11	10.12	0.99
	Laundrettes & dry cleaners	G3c	0	0.00	0.89	-0.89
	Travel agents	G3d	0	0.00	1.06	-1.06
	Banks & financial services	G3e	1	3.70	3.99	-0.29
	Building societies	G3f	0	0.00	0.51	-0.51
	Estate agents & auctioneers	G3g	1	3.70	3.94	-0.24
	Total Service		**5**	**18.52**	**20.51**	**-1.99**
Misc.	Employment, careers, PO & info	G4a	0	0.00	1.18	-1.18
Vacant	Vacant	G4b	1	3.70	12.33	-8.63
Totals			**27 Units**			

Biggleswade Town Centre GOAD Update May 2016

			UNITS	%	% UK	Dif.	SQM	%	% UK	Dif.
Convenience	Bakers	G1a	3	2.16	2.16	0.00	210	0.94	1.09	-0.15
	Butchers	G1b	1	0.72	0.75	-0.03	80	0.36	0.40	-0.04
	Greengrocers & Fishmongers	G1c	0	0.00	0.64	-0.64	0	0.00	1.37	-1.37
	Groceries and Frozen Food	G1d	3	2.16	2.96	-0.80	6640	29.80	12.91	16.89
	Officences & Home Brew	G1e	1	0.72	0.48	0.24	70	0.31	0.30	0.01
	CTN & Convinience	G1f	4	2.88	2.25	0.63	500	2.24	2.25	-0.01
	Total Convenience		**12**	**8.63**	**9.22**	**-0.59**	**7500**	**33.66**	**18.32**	**15.34**
Comparison	Footwear & Repairs	G2a	3	2.16	1.69	0.47	220	0.99	1.23	-0.24
	Mens & boys wear	G2b	1	0.72	0.93	-0.21	60	0.27	0.83	-0.56
	Womens, girls & childrens wear	G2c	5	3.60	3.19	0.41	380	1.71	3.08	-1.37
	Mixed & general clothing	G2d	5	3.60	4.01	-0.41	980	4.40	6.34	-1.94
	Furniture, carpets & textiles	G2e	4	2.88	3.32	-0.44	880	3.95	3.64	0.31
	Books, arts/craft, stationary	G2f	5	3.60	4.19	-0.59	340	1.53	3.08	-1.55
	Elec, home ent, phones,video	G2g	2	1.44	3.57	-2.13	70	0.31	2.52	-2.21
	DIY, hardware & household	G2h	3	2.16	2.39	-0.23	470	2.11	4.79	-2.68
	Gifts, china, glass & leather goods	G2i	0	0.00	1.70	-1.70	0	0.00	0.90	-0.90
	Cars, motor cycles & accessories	G2j	1	0.72	1.14	-0.42	400	1.80	1.77	0.03
	Chemists, toiletries & opticians	G2k	9	6.47	3.89	2.58	1300	5.83	3.91	1.92
	Variety, department & catalogue	G2l	3	2.16	0.61	1.55	1000	4.49	6.27	-1.78
	Florists & gardens	G2m	2	1.44	0.85	0.59	100	0.45	0.39	0.06
	Sports, toys, cycles & hobbies	G2n	0	0.00	2.00	-2.00	0	0.00	2.27	-2.27
	Jewellers, clocks & repairs	G2o	3	2.16	1.94	0.22	180	0.81	0.91	-0.10
	Charity, pets & other	G2p	4	2.88	4.36	-1.48	350	1.57	3.04	-1.47
	Total Comparison		**50**	**35.97**	**39.75**	**-3.78**	**6730**	**30.21**	**44.95**	**-14.74**
Services	Restaurant, cafés, fast food	G3a	21	15.11	17.01	-1.90	2120	9.52	12.54	-3.02
	Hairdressing, beauty & health	G3b	19	13.67	10.12	3.55	1470	6.60	4.89	1.71
	Laundrettes & dry cleaners	G3c	0	0.00	0.89	-0.89	0	0.00	0.40	-0.40
	Travel agents	G3d	2	1.44	1.06	0.38	180	0.81	0.66	0.15
	Banks & financial services	G3e	6	4.32	3.99	0.33	1290	5.79	4.27	1.52
	Building societies	G3f	1	0.72	0.51	0.21	190	0.85	0.41	0.44
	Estate agents & auctioneers	G3g	7	5.04	3.94	1.10	540	2.42	2.20	0.22
	Total Service		**35**	**25.18**	**20.51**	**4.67**	**3670**	**16.47**	**12.83**	**3.64**
Misc.	Employment, careers, PO & info	G4a	3	2.16	1.18	0.98	240	1.08	1.01	0.07
Vacant	Vacant	G4b	18	12.95	12.33	0.62	2020	9.07	10.34	-1.27
Totals			**139 Units**				**22280 sqm**			

Sandy Town Centre GOAD Update May 2016

			UNITS	%	% UK	Dif.	SQM	%	% UK	Dif.
Convenience	Bakers	G1a	2	3.28	2.16	1.12	240	3.13	1.09	2.04
	Butchers	G1b	1	1.64	0.75	0.89	90	1.17	0.40	0.77
	Greengrocers & Fishmongers	G1c	0	0.00	0.64	-0.64	0	0.00	1.37	-1.37
	Groceries and Frozen Food	G1d	1	1.64	2.96	-1.32	930	12.14	12.91	-0.77
	Officences & Home Brew	G1e	0	0.00	0.48	-0.48	0	0.00	0.30	-0.30
	CTN & Convinience	G1f	3	4.92	2.25	2.67	370	4.83	2.25	2.58
	Total Convenience		**7**	**11.48**	**9.22**	**2.26**	**1630**	**21.28**	**18.32**	**2.96**
Comparison	Footwear & Repairs	G2a	0	0.00	1.69	-1.69	0	0.00	1.23	-1.23
	Mens & boys wear	G2b	0	0.00	0.93	-0.93	0	0.00	0.83	-0.83
	Womens, girls & childrens wear	G2c	0	0.00	3.19	-3.19	0	0.00	3.08	-3.08
	Mixed & general clothing	G2d	1	1.64	4.01	-2.37	120	1.57	6.34	-4.77
	Furniture, carpets & textiles	G2e	2	3.28	3.32	-0.04	260	3.39	3.64	-0.25
	Books, arts/craft, stationary	G2f	2	3.28	4.19	-0.91	160	2.09	3.08	-0.99
	Elec, home ent, phones,video	G2g	1	1.64	3.57	-1.93	80	1.04	2.52	-1.48
	DIY, hardware & household	G2h	1	1.64	2.39	-0.75	160	2.09	4.79	-2.70
	Gifts, china, glass & leather goods	G2i	0	0.00	1.70	-1.70	0	0.00	0.90	-0.90
	Cars, motor cycles & accessories	G2j	0	0.00	1.14	-1.14	0	0.00	1.77	-1.77
	Chemists, toiletries & opticians	G2k	3	4.92	3.89	1.03	740	9.66	3.91	5.75
	Variety, department & catalogue	G2l	0	0.00	0.61	-0.61	0	0.00	6.27	-6.27
	Florists & gardens	G2m	1	1.64	0.85	0.79	100	1.31	0.39	0.92
	Sports, toys, cycles & hobbies	G2n	0	0.00	2.00	-2.00	0	0.00	2.27	-2.27
	Jewellers, clocks & repairs	G2o	1	1.64	1.94	-0.30	30	0.39	0.91	-0.52
	Charity, pets & other	G2p	3	4.92	4.36	0.56	410	5.35	3.04	2.31
	Total Comparison		**15**	**24.59**	**39.75**	**-15.16**	**2060**	**26.89**	**44.95**	**-18.06**
Services	Restaurant, cafés, fast food	G3a	11	18.03	17.01	1.02	1580	20.63	12.54	8.09
	Hairdressing, beauty & health	G3b	14	22.95	10.12	12.83	930	12.14	4.89	7.25
	Laundrettes & dry cleaners	G3c	1	1.64	0.89	0.75	60	0.78	0.40	0.38
	Travel agents	G3d	0	0.00	1.06	-1.06	0	0.00	0.66	-0.66
	Banks & financial services	G3e	3	4.92	3.99	0.93	630	8.22	4.27	3.95
	Building societies	G3f	0	0.00	0.51	-0.51	0	0.00	0.41	-0.41
	Estate agents & auctioneers	G3g	4	6.56	3.94	2.62	350	4.57	2.20	2.37
	Total Service		**22**	**36.07**	**20.51**	**15.56**	**1970**	**25.72**	**12.83**	**12.89**
Misc.	Employment, careers, PO & info	G4a	2	3.28	1.18	2.10	130	1.70	1.01	0.69
Vacant	Vacant	G4b	4	6.56	12.33	-5.77	290	3.79	10.34	-6.55
Totals			**61 Units**				**7660 sqm**			

Flitwick Town Centre GOAD Update May 2016

			UNITS	%	% UK	Dif.
Convenience	Bakers	G1a	0	0.00	2.16	-2.16
	Butchers	G1b	0	0.00	0.75	-0.75
	Greengrocers & Fishmongers	G1c	0	0.00	0.64	-0.64
	Groceries and Frozen Food	G1d	2	5.71	2.96	2.75
	Officences & Home Brew	G1e	0	0.00	0.48	-0.48
	CTN & Convinience	G1f	1	2.86	2.25	0.61
	Total Convenience		**3**	**8.57**	**9.22**	**-0.65**
Comparison	Footwear & Repairs	G2a	0	0.00	1.69	-1.69
	Mens & boys wear	G2b	0	0.00	0.93	-0.93
	Womens, girls & childrens wear	G2c	0	0.00	3.19	-3.19
	Mixed & general clothing	G2d	0	0.00	4.01	-4.01
	Furniture, carpets & textiles	G2e	0	0.00	3.32	-3.32
	Books, arts/craft, stationary	G2f	0	0.00	4.19	-4.19
	Elec, home ent, phones,video	G2g	1	2.86	3.57	-0.71
	DIY, hardware & household	G2h	0	0.00	2.39	-2.39
	Gifts, china, glass & leather goods	G2i	1	2.86	1.70	1.16
	Cars, motor cycles & accessories	G2j	1	2.86	1.14	1.72
	Chemists, toiletries & opticians	G2k	3	8.57	3.89	4.68
	Variety, department & catalogue	G2l	0	0.00	0.61	-0.61
	Florists & gardens	G2m	1	2.86	0.85	2.01
	Sports, toys, cycles & hobbies	G2n	1	2.86	2.00	0.86
	Jewellers, clocks & repairs	G2o	1	2.86	1.94	0.92
	Charity, pets & other	G2p	1	2.86	4.36	-1.50
	Total Comparison		**10**	**28.57**	**39.75**	**-11.18**
Services	Restaurant, cafés, fast food	G3a	8	22.86	17.01	5.85
	Hairdressing, beauty & health	G3b	3	8.57	10.12	-1.55
	Laundrettes & dry cleaners	G3c	1	2.86	0.89	1.97
	Travel agents	G3d	0	0.00	1.06	-1.06
	Banks & financial services	G3e	1	2.86	3.99	-1.13
	Building societies	G3f	1	2.86	0.51	2.35
	Estate agents & auctioneers	G3g	7	20.00	3.94	16.06
	Total Service		**13**	**37.14**	**20.51**	**16.63**
Misc.	Employment, careers, PO & info	G4a	1	2.86	1.18	1.68
Vacant	Vacant	G4b	0	0.00	12.33	-12.33
Totals			**35 Units**			

Ampthill Town Centre GOAD Update May 2016

			UNITS	%	% UK	Dif.	SQM	%	% UK	Dif.
Convenience	Bakers	G1a	2	2.50	2.16	0.34	300	3.34	1.09	2.25
	Butchers	G1b	1	1.25	0.75	0.50	60	0.67	0.40	0.27
	Greengrocers & Fishmongers	G1c	0	0.00	0.64	-0.64	0	0.00	1.37	-1.37
	Groceries and Frozen Food	G1d	1	1.25	2.96	-1.71	2420	26.92	12.91	14.01
	Officences & Home Brew	G1e	1	1.25	0.48	0.77	80	0.89	0.30	0.59
	CTN & Convinience	G1f	2	2.50	2.25	0.25	200	2.22	2.25	-0.03
	Total Convenience		**7**	**8.75**	**9.22**	**-0.47**	**3060**	**34.04**	**18.32**	**15.72**
Comparison	Footwear & Repairs	G2a	0	0.00	1.69	-1.69	0	0.00	1.23	-1.23
	Mens & boys wear	G2b	1	1.25	0.93	0.32	20	0.22	0.83	-0.61
	Womens, girls & childrens wear	G2c	2	2.50	3.19	-0.69	130	1.45	3.08	-1.63
	Mixed & general clothing	G2d	1	1.25	4.01	-2.76	90	1.00	6.34	-5.34
	Furniture, carpets & textiles	G2e	5	6.25	3.32	2.93	610	6.79	3.64	3.15
	Books, arts/craft, stationary	G2f	1	1.25	4.19	-2.94	50	0.56	3.08	-2.52
	Elec, home ent, phones,video	G2g	4	5.00	3.57	1.43	260	2.89	2.52	0.37
	DIY, hardware & household	G2h	4	5.00	2.39	2.61	330	3.67	4.79	-1.12
	Gifts, china, glass & leather goods	G2i	5	6.25	1.70	4.55	340	3.78	0.90	2.88
	Cars, motor cycles & accessories	G2j	1	1.25	1.14	0.11	160	1.78	1.77	0.01
	Chemists, toiletries & opticians	G2k	2	2.50	3.89	-1.39	250	2.78	3.91	-1.13
	Variety, department & catalogue	G2l	0	0.00	0.61	-0.61	0	0.00	6.27	-6.27
	Florists & gardens	G2m	0	0.00	0.85	-0.85	0	0.00	0.39	-0.39
	Sports, toys, cycles & hobbies	G2n	2	2.50	2.00	0.50	230	2.56	2.27	0.29
	Jewellers, clocks & repairs	G2o	1	1.25	1.94	-0.69	60	0.67	0.91	-0.24
	Charity, pets & other	G2p	3	3.75	4.36	-0.61	290	3.23	3.04	0.19
	Total Comparison		**32**	**40.00**	**39.75**	**0.25**	**2820**	**31.37**	**44.95**	**-13.58**
Services	Restaurant, cafés, fast food	G3a	17	21.25	17.01	4.24	1440	16.02	12.54	3.48
	Hairdressing, beauty & health	G3b	10	12.50	10.12	2.38	740	8.23	4.89	3.34
	Laundrettes & dry cleaners	G3c	0	0.00	0.89	-0.89	0	0.00	0.40	-0.40
	Travel agents	G3d	0	0.00	1.06	-1.06	0	0.00	0.66	-0.66
	Banks & financial services	G3e	5	6.25	3.99	2.26	340	3.78	4.27	-0.49
	Building societies	G3f	0	0.00	0.51	-0.51	0	0.00	0.41	-0.41
	Estate agents & auctioneers	G3g	7	8.75	3.94	4.81	440	4.89	2.20	2.69
	Total Service (exc Food)		**22**	**27.50**	**20.51**	**6.99**	**1520**	**16.91**	**12.83**	**4.08**
Misc.	Employment, careers, PO & info	G4a	1	1.25	1.18	0.07	40	0.44	1.01	-0.57
Vacant	Vacant	G4b	1	1.25	12.33	-11.08	110	1.22	10.34	-9.12
Totals			**80 Units**				**8990 sqm**			

APPENDIX B CAPACITY ASSESSMENT

Central Bedfordshire Retail and Leisure Study Update 2016

Table 1: Population

	1a	1b	2	3	4	5	6	7	8	9	10	11	Total
2015	105,866	110,847	25,512	52,529	47,975	46,278	26,088	28,228	57,453	42,344	26,080	32,851	602,051
2016	106,727	111,749	25,708	52,933	48,365	46,654	26,300	28,458	57,776	42,582	26,280	33,022	606,556
2021	111,033	116,257	26,688	54,950	50,316	48,537	27,361	29,606	59,394	43,774	27,282	33,880	629,078
2026	115,338	120,765	27,668	56,968	52,268	50,419	28,422	30,754	61,011	44,966	28,284	34,737	651,601
2031	119,644	125,273	28,648	58,986	54,219	52,301	29,483	31,902	62,629	46,158	29,286	35,594	674,123
2035	123,089	128,880	29,432	60,601	55,780	53,807	30,332	32,820	63,922	47,112	30,087	36,279	692,142

Notes

2015 population derived from Experian Retail Planner MMG3 (population projections)

Growth rates derived on a zonal basis with reference to the Luton & Central Bedfordshire Strategic Housing Market Assessment Update Report of Findings Summer 2015. Based on Figure 63, PBA zones translated into the four HMAs: Luton (PBA zones 1, 2 & 4-7), Stevenage (2, 3 & 10), Milton Keynes (8 & 9) and Bedford (11). Population growth then derived from the 2016 SHMA update as follows:

	Luton	Central Beds	Total
Population 2015	217,096	271,529	488,625
Population 2035	253,654	325,061	578,716
Total growth	36,558	53,532	90,091

Population growth proportioned by each HMA based on the same splits used in the SHMA. Within each HMA area, forecast growth split proportionately based on 2011 zone population

	1a	1b	2	3	4	5	6	7	8	9	10	11	Total
Annual growth	861	902	196	404	390	376	212	230	323	238	200	171	4,505
Growth over 20 years	17,223	18,033	3,920	8,072	7,805	7,529	4,244	4,592	6,469	4,768	4,007	3,428	90,091

Central Bedfordshire Retail and Leisure Study Update 2016

Table 2: Comparison goods spending

Per capita comparison goods spending (SFT)

	1a	1b	2	3	4	5	6	7	8	9	10	11
2015	£2,062	£2,503	£3,411	£3,324	£3,948	£3,065	£2,682	£3,629	£3,326	£3,734	£3,184	£3,328
2016	£2,111	£2,563	£3,493	£3,403	£4,042	£3,139	£2,746	£3,716	£3,406	£3,824	£3,260	£3,408
2021	£2,368	£2,875	£3,917	£3,817	£4,533	£3,520	£3,080	£4,167	£3,820	£4,288	£3,656	£3,822
2026	£2,772	£3,365	£4,585	£4,468	£5,307	£4,121	£3,605	£4,878	£4,471	£5,020	£4,280	£4,474
2031	£3,257	£3,954	£5,388	£5,250	£6,236	£4,842	£4,237	£5,732	£5,254	£5,899	£5,030	£5,257

Total comparison goods spending (excluding SFT) (£M)

	1a	1b	2	3	4	5	6	7	8	9	10	11	Total
2015	£218.28	£277.48	£87.02	£174.59	£189.39	£141.86	£69.97	£102.43	£191.11	£158.12	£83.04	£109.33	£1,802.60
2016	£225.34	£286.45	£89.79	£180.15	£195.51	£146.44	£72.23	£105.74	£196.80	£162.83	£85.68	£112.53	£1,859.50
2021	£262.90	£334.20	£104.53	£209.73	£228.10	£170.86	£84.27	£123.37	£226.87	£187.72	£99.76	£129.48	£2,161.79
2026	£319.67	£406.37	£126.86	£254.52	£277.36	£207.75	£102.47	£150.01	£272.80	£225.72	£121.06	£155.40	£2,620.00
2031	£389.68	£495.36	£154.35	£309.69	£338.10	£253.25	£124.91	£182.86	£329.07	£272.28	£147.30	£187.11	£3,183.95

Notes

2014 prices

SFT deducted at 11.2% (2014) - Experian Retail Planner Briefing Note 13 Appendix 3 Figure 5

Comparison growth rates (exc. SFT adjusted for sales via stores) applied from ERPBN Appendix 3 Figure 6

Central Bedfordshire Retail and Leisure Study Update 2016

Table 3: Convenience goods spending

Per capita convenience goods spending (SFT)

	1a	1b	2	3	4	5	6	7	8	9	10	11
2015	£1,727	£1,835	£2,137	£2,171	£2,358	£2,102	£1,982	£2,253	£2,158	£2,329	£2,127	£2,192
2016	£1,723	£1,831	£2,133	£2,166	£2,354	£2,097	£1,978	£2,249	£2,154	£2,324	£2,123	£2,188
2021	£1,713	£1,820	£2,120	£2,153	£2,339	£2,085	£1,966	£2,235	£2,141	£2,310	£2,110	£2,175
2026	£1,702	£1,809	£2,107	£2,141	£2,325	£2,072	£1,954	£2,222	£2,128	£2,296	£2,098	£2,162
2031	£1,694	£1,800	£2,097	£2,130	£2,314	£2,062	£1,945	£2,211	£2,117	£2,285	£2,087	£2,151

Total convenience goods spending (excluding SFT) (£M)

	1a	1b	2	3	4	5	6	7	8	9	10	11	Total
2015	£182.78	£203.39	£54.53	£114.03	£113.14	£97.26	£51.70	£63.60	£123.98	£98.60	£55.48	£72.02	£1,230.50
2016	£183.90	£204.63	£54.83	£114.68	£113.83	£97.86	£52.02	£63.99	£124.43	£98.96	£55.79	£72.25	£1,237.16
2021	£190.17	£211.61	£56.58	£118.33	£117.71	£101.19	£53.79	£66.17	£127.15	£101.12	£57.57	£73.69	£1,275.09
2026	£196.36	£218.50	£58.31	£121.94	£121.54	£104.49	£55.54	£68.32	£129.83	£103.25	£59.33	£75.10	£1,312.52
2031	£202.68	£225.53	£60.07	£125.63	£125.45	£107.85	£57.33	£70.52	£132.60	£105.46	£61.12	£76.57	£1,350.82

Notes

2014 prices

SFT deducted at 2.5% (2014) - Experian Retail Planner Briefing Note 13 Appendix 3 Figure 5

Comparison growth rates (exc. SFT adjusted for sales via stores) applied from ERPBN Appendix 3 Figure 6

Central Bedfordshire Retail and Leisure Study Update 2016
Table 4: Comparison market shares 2012

Destination [1]	1a	1b	2	3	4	5	6	7	8	9	10	11	Total
Zone 1a													
Luton	45.7%	44.6%	1.4%	1.4%	7.6%	11.2%	11.2%	6.3%	0.3%	1.2%	0.0%	0.0%	16.6%
Laporte Retail Park, Dallow Road, Luton	4.4%	3.9%	0.0%	0.4%	0.7%	3.2%	4.6%	1.5%	0.2%	0.2%	0.0%	0.0%	1.9%
Luton Retail Park, Gipsy Lane, Luton	16.9%	14.6%	0.0%	1.3%	7.8%	1.8%	3.1%	1.3%	0.0%	0.3%	0.0%	0.2%	6.1%
Other - Zone 1A	0.9%	0.2%	0.0%	0.0%	0.1%	0.0%	0.3%	0.3%	0.0%	0.0%	0.0%	0.0%	0.2%
Zone 1b													
Hatters Way Retail Park, Chaul End Lane, Luton	3.8%	4.3%	0.0%	0.1%	1.0%	0.5%	1.8%	0.9%	0.0%	0.2%	0.1%	0.0%	1.5%
Other - Zone 1B	1.7%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.1%	0.0%	0.0%	0.7%
Zone 2													
Shefford	0.0%	0.0%	5.9%	0.3%	0.0%	0.0%	0.0%	1.1%	0.1%	0.0%	0.3%	0.6%	0.5%
Other - Zone 2	0.0%	0.2%	1.5%	0.3%	0.0%	0.3%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.2%
Zone 3													
Hitchin	1.2%	1.1%	12.1%	31.9%	1.1%	0.1%	0.1%	2.2%	0.0%	0.3%	1.8%	0.8%	4.3%
Other - Zone 3	0.0%	0.0%	0.0%	0.4%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.1%
Zone 4													
Harpenden	0.5%	0.1%	0.0%	0.0%	18.5%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%
Other - Zone 4	0.0%	0.0%	0.0%	0.1%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Zone 5													
Dunstable	3.8%	5.6%	0.0%	0.0%	2.1%	39.5%	25.8%	0.9%	1.1%	0.4%	0.0%	0.0%	5.9%
White Lion Retail Park, Boscombe Road, Dunstable	3.2%	4.1%	0.0%	0.0%	0.1%	6.9%	8.2%	0.4%	0.5%	0.0%	0.0%	0.0%	2.1%
Other - Zone 5	0.2%	0.2%	0.0%	0.1%	0.5%	1.6%	0.7%	0.0%	0.2%	0.0%	0.0%	0.0%	0.3%
Zone 6													
Houghton Regis	0.0%	0.1%	0.0%	0.0%	0.0%	0.1%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Other - Zone 6	0.0%	0.2%	0.0%	0.0%	0.0%	0.4%	1.8%	0.4%	0.2%	0.1%	0.0%	0.0%	0.2%
Zone 7													
Flitwick	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	1.4%	10.5%	0.1%	2.9%	0.0%	0.0%	0.9%
Other - Zone 7	0.0%	0.1%	0.0%	0.2%	0.0%	0.0%	0.0%	2.2%	0.0%	0.3%	0.0%	0.0%	0.2%
Zone 8													
Leighton Buzzard	0.3%	0.5%	0.0%	0.0%	0.1%	1.8%	1.0%	0.6%	30.2%	0.4%	0.0%	0.0%	3.3%
Other - Zone 8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.2%	0.0%	0.0%	0.1%
Zone 9													
Ampthill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	2.5%	0.0%	0.0%	0.3%
Other - Zone 9	0.2%	0.3%	0.0%	0.1%	0.0%	0.1%	0.0%	0.2%	0.6%	2.5%	0.0%	0.0%	0.3%
Zone 10													
Biggleswade	0.1%	0.1%	8.2%	0.3%	0.2%	0.0%	0.0%	0.5%	0.1%	0.4%	33.9%	14.5%	3.1%
Biggleswade Retail Park, London Road, Biggleswade	0.0%	0.1%	3.7%	0.5%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	11.8%	7.7%	1.3%
Other - Zone 10	0.2%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.2%	0.1%
Zone 11													
Sandy	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.4%	3.9%	0.3%
Zone 11 centres / stores	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	2.4%	0.2%
Sub TOTAL inside study area	**83.2%**	**82.8%**	**34.0%**	**37.3%**	**41.6%**	**68.0%**	**62.7%**	**30.8%**	**34.9%**	**12.0%**	**49.5%**	**30.2%**	**52.6%**
Outside study area													
Aylesbury	0.1%	0.1%	0.0%	0.0%	0.0%	0.2%	0.2%	0.0%	7.0%	0.0%	0.0%	0.5%	0.8%
Bedford	0.4%	0.8%	10.6%	0.5%	0.0%	0.3%	0.6%	21.6%	0.3%	15.5%	12.5%	20.0%	5.0%
Cambridge	0.2%	0.1%	1.5%	2.1%	0.0%	0.1%	0.0%	0.0%	0.2%	1.1%	2.2%	5.9%	0.9%
Hatfield	0.5%	0.1%	0.2%	0.8%	3.9%	0.4%	0.0%	0.1%	0.0%	0.0%	0.3%	0.2%	0.6%
Hemel Hempstead	0.6%	0.1%	0.0%	0.1%	3.3%	2.2%	0.2%	0.0%	0.9%	0.1%	0.0%	0.5%	0.7%
Letchworth	0.0%	0.0%	7.2%	2.7%	0.0%	0.0%	0.1%	0.0%	0.0%	0.2%	2.4%	0.5%	0.9%
London	1.8%	1.5%	0.9%	3.9%	3.8%	1.2%	0.8%	0.4%	1.3%	0.2%	1.6%	0.1%	1.6%
Milton Keynes	5.2%	6.3%	5.2%	2.4%	1.9%	20.9%	23.7%	23.5%	35.0%	26.9%	4.9%	8.9%	12.4%
St Albans	1.4%	0.8%	0.1%	1.5%	16.0%	1.6%	0.4%	0.9%	0.0%	0.0%	0.0%	0.0%	2.1%
St Albans Retail Park, Griffiths Way, St Albans	0.1%	0.1%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Stevenage	0.6%	0.6%	18.3%	13.0%	0.2%	0.0%	0.0%	0.7%	0.0%	0.0%	8.1%	2.6%	3.1%
Welwyn Garden City	0.6%	1.0%	3.9%	10.7%	14.9%	0.1%	0.0%	0.0%	0.2%	0.0%	2.0%	1.5%	3.1%
St Johns Centre Retail Park, Rope Walk, Bedford	0.0%	0.2%	0.4%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	2.7%	2.8%	4.9%	0.8%
Beacon Retail Park, Watling Street, Bletchley	0.2%	0.1%	0.1%	0.0%	0.1%	0.7%	1.4%	0.3%	3.0%	3.5%	0.0%	0.0%	0.8%
Interchange Retail Park, Race Meadows Way, Kempston	0.1%	0.6%	2.0%	0.9%	0.0%	0.0%	0.6%	9.6%	0.0%	12.4%	2.1%	8.1%	2.4%
Central Retail Park, Patriot Drive, Milton Keynes	0.1%	0.3%	0.7%	0.0%	0.0%	0.1%	0.6%	2.2%	2.6%	5.5%	0.0%	0.2%	0.9%
Kingston Retail Park, Winchester Circle, Milton Keynes	0.1%	0.4%	0.0%	0.0%	0.0%	0.5%	2.1%	2.2%	1.8%	7.0%	0.1%	0.3%	0.9%
Winterhill Retail Park, Snowdon Drive, Winterhill, Milton K	0.2%	0.1%	0.0%	0.0%	0.0%	0.6%	0.9%	0.1%	2.0%	2.4%	0.1%	0.1%	0.5%
Monkswood Retail Park, Elder Way, Stevenage	0.0%	0.0%	2.8%	2.9%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.6%	0.2%	0.5%
Roaring Meg Retail Park, Stevenage	0.0%	0.1%	5.9%	13.1%	0.2%	0.0%	0.0%	0.2%	0.0%	0.0%	4.1%	2.0%	1.9%
Other - Outside study area	4.8%	3.7%	6.2%	8.2%	11.6%	3.2%	5.8%	4.6%	10.8%	10.6%	6.7%	13.3%	7.2%
Sub TOTAL outside study area	**16.8%**	**17.1%**	**66.0%**	**62.7%**	**58.4%**	**32.0%**	**37.3%**	**69.2%**	**65.1%**	**88.0%**	**50.5%**	**69.8%**	**47.3%**
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**
Total Central Bedfordshire market share	**8.1%**	**11.6%**	**20.4%**	**1.7%**	**3.0%**	**50.9%**	**41.6%**	**18.1%**	**34.4%**	**9.6%**	**47.4%**	**29.2%**	**19.2%**

Notes
(1) Derived from the household survey (2012), excluding 'don't know' answers. All centres that achieve a 2% or greater market share from any one zone are listed separately.

Central Bedfordshire Retail and Leisure Study Update 2016

Table 6: Comparison turnover 2016

	1a	1b	2	3	4	5	6	7	8	9	10	11	Total
Zone 1a													
Luton	£103.0	£127.6	£1.3	£2.6	£14.8	£16.4	£8.1	£6.7	£0.6	£2.0	£0.0	£0.0	£283.0
Laporte Retail Park, Dallow Road, Luton	£9.9	£11.1	£0.0	£0.7	£1.4	£4.7	£3.4	£1.6	£0.4	£0.4	£0.0	£0.0	£33.4
Luton Retail Park, Gipsy Lane, Luton	£38.2	£41.8	£0.0	£2.4	£15.2	£2.7	£2.2	£1.4	£0.0	£0.4	£0.0	£0.3	£104.5
Other - Zone 1A	£2.0	£0.5	£0.0	£0.0	£0.1	£0.0	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0	£3.2
Zone 1b													
Hatters Way Retail Park, Chaul End Lane, Luton	£8.6	£12.4	£0.0	£0.1	£2.0	£0.7	£1.3	£0.9	£0.0	£0.4	£0.1	£0.0	£26.6
Other - Zone 1B	£3.9	£7.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.3	£0.0	£0.2	£0.0	£0.0	£11.5
Zone 2													
Shefford	£0.0	£0.0	£5.3	£0.6	£0.0	£0.0	£0.0	£1.1	£0.2	£0.0	£0.2	£0.7	£8.1
Other - Zone 2	£0.0	£0.6	£1.4	£0.5	£0.0	£0.4	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£3.4
Zone 3													
Hitchin	£2.6	£3.1	£10.9	£57.4	£2.1	£0.1	£0.1	£2.3	£0.0	£0.6	£1.6	£0.8	£81.7
Other - Zone 3	£0.0	£0.0	£0.0	£0.7	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£1.2
Zone 4													
Harpenden	£1.0	£0.4	£0.0	£0.0	£36.2	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£38.0
Other - Zone 4	£0.0	£0.0	£0.0	£0.2	£3.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.4
Zone 5													
Dunstable	£8.5	£16.0	£0.0	£0.0	£4.1	£57.8	£18.6	£0.9	£2.2	£0.7	£0.0	£0.0	£108.7
White Lion Retail Park, Boscombe Road, Dunstable	£7.2	£11.6	£0.0	£0.0	£0.2	£10.2	£5.9	£0.4	£1.0	£0.0	£0.0	£0.0	£36.5
Other - Zone 5	£0.5	£0.5	£0.0	£0.1	£0.9	£2.3	£0.5	£0.0	£0.3	£0.0	£0.0	£0.0	£5.1
Zone 6													
Houghton Regis	£0.0	£0.2	£0.0	£0.0	£0.0	£0.1	£2.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.3
Other - Zone 6	£0.1	£0.6	£0.0	£0.1	£0.0	£0.6	£1.3	£0.4	£0.4	£0.2	£0.0	£0.0	£3.6
Zone 7													
Flitwick	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£1.0	£11.2	£0.2	£4.7	£0.0	£0.0	£17.6
Other - Zone 7	£0.0	£0.4	£0.0	£0.3	£0.0	£0.0	£0.0	£2.3	£0.0	£0.4	£0.0	£0.0	£3.5
Zone 8													
Leighton Buzzard	£0.7	£1.4	£0.0	£0.0	£0.1	£2.7	£0.7	£0.6	£59.4	£0.7	£0.0	£0.0	£66.2
Other - Zone 8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.3	£0.3	£0.0	£0.0	£2.6
Zone 9													
Ampthill	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£0.0	£4.0	£0.0	£0.0	£5.4
Other - Zone 9	£0.5	£0.9	£0.0	£0.1	£0.0	£0.2	£0.0	£0.2	£1.1	£4.0	£0.0	£0.0	£7.0
Zone 10													
Biggleswade	£0.3	£0.3	£7.4	£0.6	£0.5	£0.0	£0.0	£0.5	£0.2	£0.6	£29.0	£16.3	£55.7
Biggleswade Retail Park, London Road, Biggleswade	£0.0	£0.3	£3.3	£0.8	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£10.1	£8.6	£23.5
Other - Zone 10	£0.5	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.2	£1.7
Zone 11													
Sandy	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.3	£4.4	£5.2
Zone 11 centres / stores	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£2.7	£3.3
Sub TOTAL inside study area	**£187.5**	**£237.2**	**£30.5**	**£67.2**	**£81.2**	**£99.5**	**£45.3**	**£32.6**	**£68.7**	**£19.5**	**£42.4**	**£34.0**	**£945.7**
Outside study area													
Aylesbury	£0.15	£0.25	£0.00	£0.00	£0.00	£0.31	£0.15	£0.00	£13.85	£0.00	£0.00	£0.52	£15.22
Bedford	£0.81	£2.36	£9.49	£0.83	£0.00	£0.42	£0.43	£22.84	£0.66	£25.23	£10.72	£22.45	£96.25
Cambridge	£0.41	£0.37	£1.36	£3.73	£0.00	£0.22	£0.00	£0.00	£0.30	£1.82	£1.90	£6.66	£16.76
Hatfield	£1.16	£0.37	£0.19	£1.45	£7.65	£0.60	£0.00	£0.13	£0.00	£0.00	£0.22	£0.18	£11.93
Hemel Hempstead	£1.39	£0.19	£0.00	£0.16	£6.40	£3.17	£0.11	£0.00	£1.79	£0.11	£0.00	£0.53	£13.84
Letchworth	£0.07	£0.00	£6.47	£4.82	£0.00	£0.00	£0.10	£0.00	£0.00	£0.32	£2.07	£0.54	£14.38
London	£3.99	£4.38	£0.83	£6.98	£7.36	£1.73	£0.55	£0.46	£2.52	£0.39	£1.41	£0.15	£30.75
Milton Keynes	£11.63	£17.92	£4.65	£4.35	£3.81	£30.54	£17.12	£24.88	£68.84	£43.74	£4.21	£10.06	£241.76
St Albans	£3.11	£2.17	£0.12	£2.72	£31.29	£2.28	£0.28	£0.90	£0.00	£0.00	£0.00	£0.00	£42.87
St Albans Retail Park, Griffiths Way, St Albans	£0.15	£0.34	£0.00	£0.08	£4.81	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£5.38
Stevenage	£1.35	£1.60	£16.42	£23.33	£0.46	£0.00	£0.00	£0.69	£0.00	£0.00	£6.96	£2.95	£53.77
Welwyn Garden City	£1.31	£2.96	£3.52	£19.26	£29.09	£0.11	£0.00	£0.00	£0.44	£0.00	£1.69	£1.68	£60.05
St Johns Centre Retail Park, Rope Walk, Bedford	£0.00	£0.67	£0.32	£0.00	£0.00	£0.00	£0.00	£2.81	£0.00	£4.35	£2.42	£5.55	£16.12
Beacon Retail Park, Watling Street, Bletchley	£0.41	£0.41	£0.10	£0.00	£0.24	£1.00	£1.01	£0.31	£5.95	£5.73	£0.00	£0.00	£15.18
Interchange Retail Park, Race Meadows Way, Kempston	£0.18	£1.85	£1.81	£1.56	£0.00	£0.00	£0.40	£10.19	£0.00	£20.12	£1.76	£9.16	£47.03
Central Retail Park, Patriot Drive, Milton Keynes	£0.26	£0.93	£0.66	£0.00	£0.00	£0.18	£0.46	£2.35	£5.10	£9.00	£0.00	£0.18	£19.13
Kingston Retail Park, Winchester Circle, Milton Keynes	£0.24	£1.19	£0.00	£0.00	£0.00	£0.78	£1.53	£2.33	£3.48	£11.33	£0.12	£0.33	£21.33
Winterhill Retail Park, Snowdon Drive, Winterhill, Milton Keynes	£0.48	£0.19	£0.00	£0.00	£0.00	£0.85	£0.63	£0.06	£3.93	£3.92	£0.10	£0.11	£10.27
Monkswood Retail Park, Elder Way, Stevenage	£0.00	£0.00	£2.53	£5.21	£0.00	£0.00	£0.00	£0.12	£0.00	£0.00	£0.48	£0.27	£8.61
Roaring Meg Retail Park, Stevenage	£0.00	£0.37	£5.26	£23.68	£0.44	£0.00	£0.00	£0.20	£0.00	£0.00	£3.51	£2.30	£35.74
Other - Outside study area	£10.82	£10.60	£5.57	£14.77	£22.68	£4.69	£4.19	£4.86	£21.25	£17.26	£5.74	£14.97	£137.39
Sub TOTAL outside study area	**£37.9**	**£49.1**	**£59.3**	**£112.9**	**£114.2**	**£46.9**	**£27.0**	**£73.1**	**£128.1**	**£143.3**	**£43.3**	**£78.6**	**£913.8**
Total	**£225.4**	**£286.3**	**£89.8**	**£180.1**	**£195.5**	**£146.4**	**£72.3**	**£105.7**	**£196.8**	**£162.9**	**£85.7**	**£112.6**	**£1,859.4**

Notes

Product Tables 3 & 4

Central Bedfordshire Retail and Leisure Study Update 2016
Table 6: Comparison goods performance of the main centres

	Turnover derived from study area (£m)	% of spend from study area	Total turnover (£m)	Gross floorspace (sqm)	Sales area (sqm)	Current sales density (£ per sqm net)
	A	**B**	**C**	**D**	**E**	**F**
Central Bedfordshire town centres						
Ampthill	£5.37	95%	£5.66	2,820	1,974	2,866
Dunstable	£108.75	95%	£114.47	11,700	8,190	13,977
Leighton Buzzard	£66.18	95%	£69.67	12,880	9,016	7,727
Biggleswade	£55.73	95%	£58.66	6,730	4,711	12,452
Sandy	£5.16	100%	£5.16	1,630	1,141	4,525
Total	**£241.20**		**£253.62**			

Notes
A - Table 5 (all zones)
B - CBRS Table 5a
C - A*B
D & E - Experian GOAD. 70% net to gross ratio adopted
F - C/E

Central Bedfordshire Retail and Leisure Study Update 2016
Table 7: Commitments to 2016

LPA reference	Location	Gross (sqm)	Net sales (sqm)	Convenience sqm net	Comparison sqm net
CB/14/02717/FULL	Mixed-use development, West of Barton Road, Silsoe (A1-A3)	3,499	2,449	1,715	735
CB/11/02827/OUT	Neighbourhood centre, Clipstone Park, South of Vandyke Road, Leighton Linslade (A1-A3)*	2,500	1,750	1,225	525
CB/11/02827/OUT	Local centre, Clipstone Park, South of Vandyke Road, Leighton Linslade (A1-A3)*	250	200	200	0
CBC/12/03613/OUT	Land West of Bidwell (North Site 1), Houghton Regis	-	10,400	1,650	8,750
CBC/12/03613/OUT	Supermarket at Land West of Bidwell (North Site 1), Houghton Regis	-	6,500	3,900	2,600
CB/15/00297/OUT	Land West of Bidwell (North Site 2), Houghton Regis (A1-A3)	-	1,000	500	500
CB/15/00817/OUT	Convenience store, Camden Site, Grovebury Road Leighton Buzzard	495	230	230	0
CB/15/01574/RM	Convenience store, Former Royal Air Force, Swales Drive, Leighton Buzzard	420	336	336	0
CB/14/04082/FULL	Land at Theedway and Billington Road (Site 17A Land At Grovebury Farm) Leighton Buzzard	405	324	324	0
CB/15/00741/FULL	Convenience store, Downs Service Station, 3 Tring Road, Dunstable	545	278	278	0
CB/13/02180/FULL	The Roebuck, 2 Hockliffe Street, Leighton Buzzard, LU7 1HJ	230	184	92	92
CB/12/02071/OUT	Grovebury Retail Park, Grovebury Road, Leighton Buzzard, LU7 4UX (1)	7,358	6,132	0	6,132
CB/14/04371/FULL	White Lion Retail Park extension, Boscombe Road, Dunstable, LU5 4WL (2)		1,370	1,112	258
CB/13/03494/FULL	Kings Reach Local centre, South of Potton Road, Biggleswade	557	446	312	134
CB/14/02515/OUT	Vehicle Storage Area, Chaul End Road, Caddington, Luton, LU1 4AX	500	400	280	120
CB/16/00814/OUT	Non-food retail warehousing, Land at Camden Site, Grovebury Road, Leighton Buzzard				
	Total		**31,999**	**12,153**	**19,845**

Notes

1 - restricted to sale of DIY/Home goods.

2 - permisison granted for 1,370 sqm comparison floorsapce and conversion of 1,112 sqm of existing comparison floorspace to convenience (M&S)

Central Bedfordshire Retail and Leisure Study Update 2016
Table 8: Comparison capacity

		2016	2021	2026	2031	2035
Available expenditure and expenditure retention						
A	Total study area expenditure (£m)	£1,859	£2,162	£2,620	£3,184	3,746.6
B	Market share for Central Bedfordshire floorspace (%)	19.2%	19.2%	19.2%	19.2%	19.2%
C	Retained expenditure by Central Bedfordshire floorspace (£m)	£357.80	£415.96	£504.13	£612.64	£720.89
D	Total claim on expenditure from new openings (£m)	£4.26	£4.26	£4.26	£4.26	£4.26
E	Inflow expenditure to Central Bedfordshire floorspace (£m)	£11.97	£13.92	£16.87	£20.50	£24.13
Claim on expenditure by existing floorspace						
F	Turnover of Central Bedfordshire floorspace (£m)	£374.03	£374.03	£374.03	£374.03	£374.03
G	Growth in turnover of existing floorspace (£m)	£0.00	£28.91	£60.05	£93.60	£122.29
Claim on expenditure by commitments to new floorspace						
H	Total claim on expenditure from commitments (£m)	£119.07	£126.38	£136.15	£146.67	£158.00
Residual expenditure available to support new floorspace						
I	Residual expenditure (£m) (=C+D-E-F-G)	-£119.07	-£95.17	-£44.97	£23.11	£94.96
Comparison floorspace requirements for Central Bedfordshire						
J	Assumed sales density for new comparison floorspace (£/sqm)	6,000	6,368	6,860	7,391	7,962
K	Net comparison sales floorspace requirement (sqm net) (=H/I)				3,127	11,927
L	Gross comparison floorspace requirement				4,467	17,038

Notes

A Table 3
B Table 8
C A * B
D Expenditure spent in the Central Beds stores from outside the study area - inflow assumptions used in CBRS 2012 carried forward to generate a proportion of inflow expenditure (3.34%), applied to latest figures
E Claims on expenditure for new openings since the household survey i.e. Morrisons Houghton Regis.
F C+D+E (in 2016)
G Growth in sales efficiencies 1.5% pa
H Table 6
I C+D+E-F-G-H
J Assumed sales density, grown in line with sales efficiency growth (G)
K I/J
L K/70%

Central Bedfordshire Retail and Leisure Study Update 2016

Table 9: Convenience market shares 2012

Destination [1]	Zone 1a	Zone 1b	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
Zone 1A													
Tesco Metro, Luton Metro, 57 Luton Arndale Centre, LUTON	4.3%	2.6%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.2%	0.0%	0.0%	1.1%
Local Stores, LUTON	2.6%	2.7%	0.3%	0.1%	0.1%	0.2%	0.3%	0.0%	0.0%	0.1%	0.0%	0.0%	0.9%
Other - Zone 1A	8.8%	4.5%	0.0%	0.0%	0.1%	0.1%	1.4%	0.0%	0.0%	0.5%	0.0%	0.2%	2.2%
Zone 1B													
Asda, Wigmore Hall Shopping Centre, Wigmore Lane, LUTON	29.2%	16.3%	0.0%	1.1%	0.0%	0.2%	0.9%	1.0%	0.0%	0.0%	0.0%	0.0%	7.4%
Sainsbury's, 34 Dunstable Road, Bury Park, LUTON	8.6%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%
Sainsbury's, Bramingham Park, Quantock Rise, Off Newbold Road, LUTON	7.6%	27.9%	0.9%	0.7%	0.9%	0.0%	1.9%	6.8%	0.0%	0.0%	0.0%	0.0%	6.7%
Other - Zone 1B	6.2%	10.8%	0.0%	0.1%	0.0%	0.0%	0.3%	0.1%	0.0%	0.0%	0.0%	0.0%	2.8%
Zone 2													
Morrisons, High Street, SHEFFORD	0.0%	0.0%	24.2%	0.8%	0.0%	0.0%	0.0%	7.6%	0.0%	1.4%	1.6%	0.4%	2.1%
Other - Zone 2	0.0%	0.0%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%	0.0%	0.3%
Zone 3													
Sainsbury's, Whinbush Road, HITCHIN	0.3%	0.0%	2.1%	23.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	2.3%
Waitrose, The Lairage, Bedford Road, HITCHIN	0.4%	0.9%	4.9%	18.9%	0.0%	0.0%	0.4%	0.5%	0.0%	0.0%	0.5%	0.0%	2.2%
Local Stores, HITCHIN	0.0%	0.0%	0.3%	2.6%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.2%	0.3%
Other - Zone 3	0.0%	0.1%	0.5%	6.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.6%
Zone 4													
Co-operative Food, 135 Southdown Road, HARPENDEN	0.1%	0.0%	0.0%	0.0%	9.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%
Marks & Spencer Simply Food, 15 Church Green Row, HARPENDEN	0.2%	0.0%	0.0%	0.3%	2.2%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.3%
Sainsbury's, 31 High Street, HARPENDEN	1.6%	0.2%	0.0%	0.3%	29.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%
Waitrose, 3-7 Leyton Road, HARPENDEN	1.4%	0.5%	0.0%	0.4%	22.6%	0.6%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%
Other - Zone 4	0.0%	0.0%	0.0%	0.2%	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
Zone 5													
Asda, Court Drive, DUNSTABLE	2.5%	7.7%	0.0%	0.0%	0.9%	22.0%	18.4%	0.5%	0.6%	0.0%	0.0%	0.0%	4.3%
Netto, High Street, Houghton Regis, DUNSTABLE	0.0%	0.2%	0.0%	0.0%	0.0%	0.9%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Sainsbury's, 2-8 Luton Road, DUNSTABLE	8.7%	4.3%	0.0%	0.0%	2.0%	28.1%	12.5%	0.0%	1.0%	0.0%	0.0%	0.0%	4.9%
Tesco Express, 68 Langdale Road, DUNSTABLE	0.5%	0.0%	0.0%	0.0%	0.9%	2.3%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.3%
Tesco Superstore, Icknield Way, Skimpot Road, DUNSTABLE	11.4%	12.0%	0.0%	0.0%	1.1%	25.9%	10.9%	0.0%	0.0%	0.0%	0.0%	0.0%	6.3%
Aldi, Church Street, DUNSTABLE	0.0%	0.5%	0.0%	0.0%	0.0%	2.8%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
Local Stores, DUNSTABLE	0.0%	0.6%	0.0%	0.0%	0.0%	2.6%	0.5%	0.1%	0.0%	0.0%	0.0%	0.0%	0.3%
Other - Zone 5	1.8%	1.5%	0.0%	0.0%	0.9%	4.5%	2.3%	0.0%	0.1%	0.0%	0.0%	0.0%	1.0%
Zone 6													
Morrisons, High Street, HOUGHTON REGIS	0.2%	0.5%	0.0%	0.0%	0.0%	0.1%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Nisa, Dunstable Road, TODDINGTON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Local Stores, HOUGHTON REGIS	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.1%
Other - Zone 6	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Zone 7													
Tesco Superstore, Coniston Road, FLITWICK	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	15.2%	57.3%	1.2%	15.0%	0.0%	1.4%	4.9%
Co-op Market Town, 85-87 Bedford Street, BARTON LE CLAY	0.1%	0.5%	0.0%	0.8%	0.0%	0.0%	0.0%	4.1%	0.0%	0.2%	0.0%	0.0%	0.4%
Other - Zone 7	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.4%	2.8%	0.0%	0.2%	0.0%	0.0%	0.2%
Zone 8													
Aldi, Vimy Road, Linslade, LEIGHTON BUZZARD	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	1.0%	0.0%	5.5%	0.0%	0.0%	0.0%	0.6%
Morrisons, Lake Street, LEIGHTON BUZZARD	0.5%	0.8%	0.0%	0.0%	0.0%	3.7%	1.3%	0.6%	20.7%	0.8%	0.0%	0.0%	2.6%
Tesco Express, 49 Coniston Road, Linslade, LEIGHTON BUZZARD	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	0.1%	0.0%	0.0%	0.4%
Tesco Superstore, Vimy Road, LEIGHTON BUZZARD	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.1%	0.5%	35.5%	0.0%	0.0%	0.0%	3.5%
Waitrose, 9 Waterbourne Walk, LEIGHTON BUZZARD	0.0%	0.2%	0.0%	0.0%	0.0%	0.9%	0.1%	0.0%	14.4%	0.9%	0.0%	0.0%	1.5%
Other - Zone 8	0.1%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.1%	4.8%	0.0%	0.0%	0.0%	0.5%
Zone 9													
Budgens, High Street, CRANFIELD	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.2%
Waitrose, 25 Bedford Street, AMPTHILL	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.9%	9.1%	0.0%	11.5%	0.0%	3.5%	1.6%
Other - Zone 9	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	4.5%	0.0%	0.2%	0.4%
Zone 10													
Asda, Church Street, BIGGLESWADE	0.0%	0.0%	6.9%	0.3%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	44.1%	18.7%	3.6%
Sainsbury's, Bells Brook, BIGGLESWADE	0.0%	0.0%	9.0%	0.7%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	33.7%	19.4%	3.3%
Aldi, Bonds Lane, BIGGLESWADE	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	1.1%	0.4%
Other - Zone 10	0.0%	0.0%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	1.1%	0.2%
Zone 11													
Co-op, POTTON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	2.0%	0.1%
Budgens, SANDY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	4.3%	0.3%
Other - Zone 11	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	4.9%	0.3%
Sub TOTAL inside study area	**97.1%**	**97.1%**	**56.3%**	**57.8%**	**75.3%**	**96.8%**	**85.1%**	**92.0%**	**87.9%**	**37.7%**	**89.4%**	**58.1%**	**80.6%**
Outside Study Area													
Tesco Extra, MK Bletchley EXTRA, Watling Street, Bletchley, MILTON KEYNES	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.9%	3.4%	0.0%	0.0%	
Tesco Extra, MK Kingston EXTRA, 1 Winchester Circus, Kingston, MILTON KEYNE	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	1.1%	0.0%	0.1%	18.7%	0.0%	0.0%	
Tesco Extra, Baldock Extra, 58 High Street, BALDOCK	0.0%	0.0%	15.0%	7.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	1.4%	
Tesco Extra, Bedford EXTRA, Cardington Road, BEDFORD	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	5.6%	1.3%	13.0%	
Sainsbury's, Corey's Mill, Hitchin Road, STEVENAGE	0.1%	0.0%	1.5%	8.3%	0.1%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	
Sainsbury's, Letchworth Business Park, Third Avenue, LETCHWORTH	0.0%	0.0%	8.1%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	
Sainsbury's, Everard Close, ST ALBANS	0.0%	0.0%	0.0%	0.0%	4.8%	0.5%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	
Sainsbury's, 252-274 Bedford Road, The Saxon Centre, KEMPSTON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	16.4%	0.0%	3.7%	
Morrisons, 244 Hatfield Road, ST ALBANS	0.2%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Morrisons, Barnesdale Drive, West Croft District Centre, MILTON KEYNES	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.5%	0.0%	0.0%	
Tesco Extra, Mount Pleasant, Oldings Corner, HATFIELD	0.0%	0.0%	0.0%	0.7%	5.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Asda Wal-Mart Supercentre, Bletcham Way, MILTON KEYNES	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	2.2%	1.1%	1.3%	0.6%	0.0%	0.0%	
Asda, Monkswood Way, STEVENAGE	0.5%	0.6%	0.5%	2.6%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.5%	
Morrisons, Broadway, LETCHWORTH	0.2%	0.0%	9.9%	9.8%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	1.5%	1.5%	
Tesco Superstore, Tring Road, AYLESBURY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.5%	
Tesco Superstore, Riverfield Drive, BEDFORD	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.2%	2.2%	
Tesco, Bicester Road, AYLESBURY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	
Tesco, Barfield Road, ST NEOTS	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.9%	
Other - Outside study area	1.6%	2.1%	5.7%	7.9%	12.3%	1.7%	8.2%	5.3%	7.4%	15.2%	5.0%	9.1%	
Sub TOTAL outside study area	**2.9%**	**2.9%**	**43.7%**	**42.2%**	**24.7%**	**3.1%**	**14.8%**	**8.0%**	**12.1%**	**62.2%**	**10.6%**	**41.8%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	
Total Central Bedfordshire market share	**25.8%**	**29.8%**	**47.2%**	**2.9%**	**6.3%**	**95.7%**	**78.7%**	**83.4%**	**87.9%**	**37.0%**	**88.6%**	**57.3%**	**45.9%**

Notes
(1) Derived from the household survey (2012), excluding 'don't know' answers. All stores that achieve a 2% or greater market share from any one zone are listed separately.

Central Bedfordshire Retail and Leisure Study Update 2016
Table 10: Convenience turnover 2016

Destination	1a	1b	2	3	4	5	6	7	8	9	10	11	Total
Zone 1A													
Tesco Metro, Luton Metro, 57 Luton Arndale Centre, LUTON	£7.92	£5.29	£0.00	£0.00	£0.00	£0.00	£0.45	£0.00	£0.00	£0.19	£0.00	£0.00	£13.86
Local Stores, LUTON	£4.76	£5.50	£0.17	£0.16	£0.12	£0.23	£0.14	£0.00	£0.00	£0.09	£0.00	£0.00	£11.18
Other - Zone 1A	£16.15	£9.25	£0.00	£0.00	£0.13	£0.10	£0.74	£0.00	£0.00	£0.46	£0.00	£0.14	£26.97
Zone 1B													
Asda, Wigmore Hall Shopping Centre, Wigmore Lane, LUTON	£53.62	£33.28	£0.00	£1.24	£0.00	£0.19	£0.45	£0.62	£0.00	£0.00	£0.00	£0.00	£89.41
Sainsbury's, 34 Dunstable Road, Bury Park, LUTON	£15.74	£1.50	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£17.24
Sainsbury's, Bramingham Park, Quantock Rise, Off Newbold Road, LUTON	£14.02	£57.13	£0.51	£0.78	£1.07	£0.00	£0.97	£4.35	£0.00	£0.00	£0.00	£0.00	£78.83
Other - Zone 1B	£11.45	£22.01	£0.00	£0.16	£0.00	£0.00	£0.14	£0.07	£0.00	£0.00	£0.00	£0.00	£33.82
Zone 2													
Morrisons, High Street, SHEFFORD	£0.00	£0.00	£13.29	£0.93	£0.00	£0.00	£0.00	£4.89	£0.00	£1.37	£0.87	£0.25	£21.61
Other - Zone 2	£0.00	£0.00	£2.94	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.09	£0.11	£0.00	£3.14
Zone 3													
Sainsbury's, Whinbush Road, HITCHIN	£0.54	£0.00	£1.16	£27.12	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.29	£29.11
Waitrose, The Lairage, Bedford Road, HITCHIN	£0.74	£1.88	£2.70	£21.69	£0.00	£0.00	£0.22	£0.31	£0.00	£0.00	£0.27	£0.00	£27.80
Local Stores, HITCHIN	£0.00	£0.00	£0.17	£2.93	£0.00	£0.00	£0.00	£0.07	£0.00	£0.00	£0.00	£0.14	£3.32
Other - Zone 3	£0.00	£0.20	£0.25	£7.38	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.17	£0.00	£8.00
Zone 4													
Co-operative Food, 135 Southdown Road, HARPENDEN	£0.10	£0.10	£0.00	£0.00	£10.33	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£10.53
Marks & Spencer Simply Food, 15 Church Green Row, HARPENDEN	£0.43	£0.00	£0.00	£0.39	£2.51	£0.00	£0.00	£0.07	£0.00	£0.00	£0.00	£0.00	£3.40
Sainsbury's, 31 High Street, HARPENDEN	£3.01	£0.47	£0.00	£0.39	£33.92	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£37.79
Waitrose, 3-7 Leyton Road, HARPENDEN	£2.60	£1.04	£0.00	£0.47	£25.77	£0.63	£0.23	£0.00	£0.00	£0.00	£0.00	£0.00	£30.74
Other - Zone 4	£0.00	£0.00	£0.00	£0.24	£4.71	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.94
Zone 5													
Asda, Court Drive, DUNSTABLE	£4.64	£15.73	£0.00	£0.00	£1.07	£21.54	£9.56	£0.31	£0.78	£0.00	£0.00	£0.00	£53.62
Netto, High Street, Houghton Regis, DUNSTABLE (1)	*£0.00*	*£0.47*	*£0.00*	*£0.00*	*£0.00*	*£0.87*	*£1.84*	*£0.00*	*£0.00*	*£0.00*	*£0.00*	*£0.00*	*£3.18*
Sainsbury's, 2-8 Luton Road, DUNSTABLE	£16.00	£8.77	£0.00	£0.00	£2.26	£27.47	£6.52	£0.00	£1.25	£0.00	£0.00	£0.00	£62.27
Tesco Express, 68 Langdale Road, DUNSTABLE	£0.87	£0.00	£0.00	£0.00	£1.07	£2.23	£0.00	£0.00	£0.17	£0.00	£0.00	£0.00	£4.34
Tesco Superstore, Icknield Way, Skimpot Road, DUNSTABLE	£21.06	£24.57	£0.00	£0.00	£1.20	£25.35	£5.69	£0.00	£0.00	£0.00	£0.00	£0.00	£77.86
Aldi, Church Street, DUNSTABLE	£0.00	£0.94	£0.00	£0.00	£0.00	£2.76	£0.73	£0.00	£0.00	£0.00	£0.00	£0.00	£4.43
Local Stores, DUNSTABLE	£0.00	£1.26	£0.00	£0.00	£0.00	£2.55	£0.28	£0.07	£0.00	£0.00	£0.00	£0.00	£4.16
Other - Zone 5	£3.22	£3.02	£0.00	£0.00	£1.07	£4.38	£1.18	£0.00	£0.17	£0.00	£0.00	£0.00	£13.04
Zone 6													
Morrisons, High Street, HOUGHTON REGIS (1)	*£0.43*	*£0.94*	*£0.00*	*£0.00*	*£0.00*	*£0.09*	*£1.08*	*£0.00*	*£0.00*	*£0.00*	*£0.00*	*£0.00*	*£2.55*
Nisa, Dunstable Road, TODDINGTON	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.66	£0.00	£0.00	£0.00	£0.00	£0.00	£1.66
Local Stores, HOUGHTON REGIS	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.03	£0.00	£0.00	£0.00	£0.00	£0.26	£1.29
Other - Zone 6	£0.00	£0.00	£0.00	£0.16	£0.00	£0.00	£1.47	£0.00	£0.00	£0.00	£0.00	£0.00	£1.62
Zone 7													
Tesco Superstore, Coniston Road, FLITWICK	£0.00	£1.41	£0.00	£0.00	£0.00	£0.00	£7.90	£36.64	£1.55	£14.81	£0.00	£1.00	£63.32
Co-op Market Town, 85-87 Bedford Street, BARTON LE CLAY	£0.21	£0.97	£0.00	£0.93	£0.00	£0.00	£0.00	£2.62	£0.00	£0.19	£0.00	£0.00	£4.93
Other - Zone 7	£0.00	£0.20	£0.00	£0.08	£0.00	£0.00	£0.23	£1.82	£0.00	£0.19	£0.00	£0.00	£2.51
Zone 8													
Aldi, Vimy Road, Linslade, LEIGHTON BUZZARD	£0.00	£0.10	£0.00	£0.00	£0.00	£0.43	£0.51	£0.00	£6.89	£0.00	£0.00	£0.00	£7.95
Morrisons, Lake Street, LEIGHTON BUZZARD	£0.86	£1.61	£0.00	£0.00	£0.00	£3.63	£0.66	£0.37	£25.71	£0.75	£0.00	£0.00	£33.60
Tesco Express, 49 Coniston Road, Linslade, LEIGHTON BUZZARD	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.72	£0.09	£0.00	£0.00	£4.81
Tesco Superstore, Vimy Road, LEIGHTON BUZZARD	£0.00	£0.00	£0.00	£0.00	£0.00	£0.99	£0.07	£0.31	£44.20	£0.00	£0.00	£0.00	£45.57
Waitrose, 9 Waterbourne Walk, LEIGHTON BUZZARD	£0.00	£0.47	£0.00	£0.00	£0.00	£0.88	£0.07	£0.00	£17.91	£0.91	£0.00	£0.00	£20.25
Other - Zone 8	£0.14	£0.10	£0.00	£0.00	£0.00	£0.43	£0.00	£0.07	£5.98	£0.00	£0.00	£0.00	£6.71
Zone 9													
Budgens, High Street, CRANFIELD	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.34	£0.00	£0.00	£2.34
Waitrose, 25 Bedford Street, AMPTHILL	£0.00	£0.47	£0.00	£0.00	£0.00	£0.00	£0.45	£5.81	£0.00	£11.38	£0.00	£2.52	£20.63
Other - Zone 9	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.14	£0.00	£4.49	£0.00	£0.15	£4.78
Zone 10													
Asda, Church Street, BIGGLESWADE	£0.00	£0.00	£3.80	£0.39	£0.00	£0.00	£0.00	£0.31	£0.00	£0.00	£24.61	£13.53	£42.64
Sainsbury's, Bells Brook, BIGGLESWADE	£0.00	£0.00	£4.95	£0.78	£0.53	£0.00	£0.00	£0.00	£0.00	£0.00	£18.78	£14.02	£39.06
Aldi, Bonds Lane, BIGGLESWADE	£0.00	£0.00	£0.77	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.69	£0.77	£4.23
Other - Zone 10	£0.00	£0.00	£0.13	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.96	£0.77	£2.96
Zone 11													
Co-op, POTTON	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.27	£1.46	£1.73
Budgens, SANDY	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£3.14	£3.19
Other - Zone 11	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£3.56	£3.62
Sub TOTAL inside study area	**£178.52**	**£198.67**	**£30.85**	**£66.29**	**£85.76**	**£94.77**	**£44.29**	**£58.84**	**£109.33**	**£37.36**	**£49.86**	**£42.00**	**£996.54**
Outside Study Area													
Tesco Extra, MK Bletchley EXTRA, Watling Street, Bletchley, MILTON KEYNES	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.14	£0.00	£1.16	£3.39	£0.00	£0.00	£4.70
Tesco Extra, MK Kingston EXTRA, 1 Winchester Circus, Kingston, MILTON KEYNES	£0.00	£0.00	£0.00	£0.00	£0.00	£0.43	£0.59	£0.00	£0.09	£18.49	£0.00	£0.00	£19.60
Tesco Extra, Baldock Extra, 58 High Street, BALDOCK	£0.00	£0.00	£8.23	£8.54	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.81	£1.00	£18.59
Tesco Extra, Bedford EXTRA, Cardington Road, BEDFORD	£0.00	£0.00	£1.28	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£5.58	£0.72	£9.41	£17.23
Sainsbury's, Corey's Mill, Hitchin Road, STEVENAGE	£0.21	£0.00	£0.84	£9.56	£0.13	£0.00	£0.00	£0.07	£0.09	£0.00	£0.00	£0.00	£10.88
Sainsbury's, Letchworth Business Park, Third Avenue, LETCHWORTH	£0.00	£0.00	£4.44	£6.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.66	£0.00	£11.23
Sainsbury's, Everard Close, ST ALBANS	£0.00	£0.10	£0.00	£0.00	£5.43	£0.52	£0.00	£0.31	£0.00	£0.00	£0.00	£0.00	£6.36
Sainsbury's, 252-274 Bedford Road, The Saxon Centre, KEMPSTON	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£16.24	£0.00	£2.69	£18.93
Morrisons, 244 Hatfield Road, ST ALBANS	£0.43	£0.00	£0.00	£0.00	£2.67	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.10
Morrisons, Barnesdale Drive, West Croft District Centre, MILTON KEYNES	£0.43	£0.47	£0.00	£0.00	£0.00	£0.00	£1.36	£0.00	£0.00	£0.45	£0.00	£0.00	£2.72
Tesco Extra, Mount Pleasant, Oldings Corner, HATFIELD	£0.00	£0.00	£0.00	£0.86	£5.88	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.73
Asda Wal-Mart Supercentre, Bletcham Way, MILTON KEYNES	£0.00	£0.00	£0.00	£0.00	£0.00	£0.43	£1.13	£0.68	£1.64	£0.55	£0.00	£0.00	£4.44
Asda, Monkswood Way, STEVENAGE	£0.87	£1.14	£0.26	£2.95	£0.00	£0.00	£0.00	£0.07	£0.00	£0.00	£0.00	£0.34	£5.62
Morrisons, Broadway, LETCHWORTH	£0.43	£0.00	£5.40	£11.26	£0.00	£0.00	£0.00	£0.62	£0.00	£0.00	£0.82	£1.06	£19.59
Tesco Superstore, Tring Road, AYLESBURY	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.89	£0.00	£0.00	£0.33	£3.22
Tesco Superstore, Riverfield Drive, BEDFORD	£0.00	£0.00	£0.33	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.83	£0.12	£1.60	£3.88
Tesco, Bicester Road, AYLESBURY	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.52	£1.52
Tesco, Barfield Road, ST NEOTS	£0.00	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£5.69	£5.74
Other - Outside study area	£2.94	£4.30	£3.13	£9.06	£14.00	£1.66	£4.27	£3.39	£9.21	£15.04	£2.79	£6.58	£76.36
Sub TOTAL outside study area	**£5.32**	**£6.01**	**£23.96**	**£48.36**	**£28.10**	**£3.06**	**£7.72**	**£5.13**	**£15.07**	**£61.58**	**£5.91**	**£30.22**	**£240.43**
TOTAL	**£183.83**	**£204.67**	**£54.81**	**£114.66**	**£113.86**	**£97.83**	**£52.01**	**£63.97**	**£124.41**	**£98.93**	**£55.77**	**£72.22**	**£1,236.97**

Notes

1 - both stores have since closed. Turnover recorded in line with household survey-based market shares but future tables reassign this turnover to the new Morrisons store, as well as an uplift to increase that new store's turnover to the projected £33.76m convenience sales (sourced from application documents; £22.53m turnover in 2013 (2005 prices) converted into 2016 turnover (2014 prices)

Central Bedfordshire Retail and Leisure Study Update 2016

Table 11: Convenience store benchmarks

	Zone	Net floorspace (1)	Conv. floorspace (%)	Net conv. floorspace	Benchmark sales density (2)	Benchmark turnover (£m)	Survey derived turnover	Under/over trading (3)
Morrisons, High Street, Shefford	2	1,504	76%	1,143	£12,213	£13.96	£21.61	£7.65
Asda, Court Drive, Dunstable	5	3,673	73%	2,681	£14,904	£39.96	£53.62	£13.66
Sainsbury's, 2-8 Luton Road, Dunstable	5	4,249	63%	2,677	£13,041	£34.91	£62.27	£27.37
Tesco, Icknield Way, Skimpot Road, Dunstable	5	4,429	62%	2,746	£11,168	£30.67	£77.86	£47.20
Aldi, Church Street, Dunstable	5	1,075	80%	860	£9,212	£7.92	£4.43	-£3.49
Tesco, Coniston Road, Flitwick	7	2,803	67%	1,878	£11,168	£20.97	£63.32	£42.35
Aldi, Vimy Road, Linslade, Leighton Buzzard	8	754	80%	603	£9,212	£5.55	£7.95	£2.39
Morrisons, Lake Street, Leighton Buzzard	8	2,270	64%	1,453	£12,213	£17.74	£33.60	£15.85
Tesco, Vimy Road, Leighton Buzzard	8	3,105	72%	2,236	£11,168	£24.97	£45.57	£20.61
Waitrose, 9 Waterbourne Walk, Leighton Buzzard	8	1,286	78%	1,000	£10,557	£10.56	£20.25	£9.69
Waitrose, 25 Bedford Street, Ampthil	9	1,672	85%	1,421	£10,557	£15.00	£20.63	£5.63
Aldi, Bonds Lane, Biggleswade	10	1,209	80%	967	£9,212	£8.91	£4.23	-£4.68
Asda, Church Street, Biggleswade	10	2,500	67%	1,675	£14,904	£24.96	£42.64	£17.67
Sainsbury's, Bells Brook, Biggleswade	10	2,638	68%	1,781	£13,041	£23.22	£39.06	£15.84
Total						**£279.31**	**£497.04**	**£217.73**
New opening								
Morrisons, High Street, Houghton Regis	6	2,399	80%	1,919	£12,213	£23.44		

Notes:
(1) Foodstores in Central Beds with 1,000 or more net floorspace are shown. Floorspace and company average food/non food splits are obtained from the previous retail studies, updated using our knowledge, observations from our site visits and information from the Council's planning applications database. The Morrisons in Houghton Regis is the enlarged store which opened since the household survey was undertaken.
(2) Average sales densities are goods based sales densities derived from Verdict's 2011 UK Grocery Retailers document in 2009 prices, increased to 2012.
(3) A positive figure indicates that the store is overtrading compared to company averages.

Central Bedfordshire Retail and Leisure Study Update 2016

Table 12: Convenience capacity

		2016	2021	2026	2031	2035
Available expenditure and expenditure retention						
A	Total study area expenditure (£m)	£1,237	£1,275	£1,313	£1,351	£1,385
B	Market share for Central Bedfordshire floorspace (%)	45.9%	45.9%	45.9%	45.9%	45.9%
C	Retained expenditure by Central Bedfordshire floorspace (£m)	£568	£585	£602	£620	£636
D	Total claim on expenditure from new openings (£m)	£28.04	£28.04	£28.04	£28.04	£28.04
E	Inflow expenditure to Central Bedfordshire floorspace (£m)	£0.00	£0.00	£0.00	£0.00	£0.00
Claim on expenditure from existing floorspace						
F	Turnover of Central Bedfordshire floorspace (£m)	£596	£596	£596	£596	£596
G	Growth in turnover of existing floorspace (£m)	£0.00	£0.00	£0.00	£0.00	£0.00
Claim on expenditure from commitments to new floorspace						
H	Total claim on expenditure from commitments (£m)	£127.27	£127.27	£127.27	£127.27	£127.27
Without overtrading						
Residual expenditure available to support new floorspace						
I	Residual expenditure (£m)	-£127.27	-£109.87	-£92.69	-£75.12	-£59.29
Floorspace requirement for Central Bedfordshire						
J	Convenience goods sales density (£/sqm)	£10,472	£10,472	£10,472	£10,472	£10,472
K	Net floorspace requirement (sqm net)	0	0	0	0	0
L	Gross floorspace requirement (sqm)	0	0	0	0	0
With overtrading						
Allowance for overtrading of existing foodstores						
M	Overtrading of main Central Beds foodstores (£m)	£217.73	£217.73	£217.73	£217.73	£217.73
Residual expenditure available to support new floorspace						
N	Residual expenditure (£m)	£90.46	£107.86	£125.04	£142.61	£158.43
Floorspace requirement for Central Bedfordshire						
O	Convenience goods sales density (£/sqm)	£10,472	£10,472	£10,472	£10,472	£10,472
P	Net floorspace requirement (sqm net)	8,638	10,300	11,940	13,618	15,129
Q	Gross floorspace requirement (sqm)	12,340	14,714	17,057	19,454	21,613

Notes

A Table 3
B Table 8
C A * B
D Expenditure spent in the Central Beds stores from outside the study area - no inflow assumed
E Claims on expenditure for new openings since the household survey i.e. Morrisons Houghton Regis. Turnover attributed to Netto Houghton Regis and Morrisons Houghton Regis by the market shares netted off the forecast turnover of the Morrisons store in 2016 to eliminate double counting
F C+D+E (in 2016)
G Growth in sales efficiencies assumed to be zero
H Table 7
I C+D+E-F-G-H
J Average sales density for main convenience operators based on 2015 Mintel
K I/J
L K/70%
M Table 10 (excluding Morrisons, Houghton Regis)
N C+D+E-F-G-H+I
O Average sales density for main convenience operators based on 2015 Mintel
P N/O
Q P/70%

Central Bedfordshire Retail and Leisure Study Update 2016

Table 13: Leisure expenditure

Per capita leisure expenditure

		1a	1b	2	3	4	5	6	7	8	9	10	11
Recreational & cultural services													
	2014	£386	£517	£637	£647	£790	£616	£560	£683	£648	£709	£608	£618
	2016	£403	£539	£665	£675	£824	£643	£584	£712	£676	£740	£634	£645
	2021	£431	£577	£711	£722	£882	£688	£625	£762	£724	£791	£679	£690
	2026	£462	£618	£761	£773	£945	£737	£669	£816	£775	£847	£727	£739
	2031	£495	£662	£816	£829	£1,013	£790	£717	£875	£831	£908	£779	£792
	2035	£524	£700	£863	£876	£1,071	£835	£758	£925	£878	£960	£824	£838
Restaurants, cafes etc.													
	2014	£1,129	£794	£917	£1,174	£1,254	£1,505	£1,115	£952	£1,285	£1,184	£1,322	£1,116
	2016	£1,178	£828	£957	£1,225	£1,309	£1,570	£1,164	£993	£1,341	£1,235	£1,380	£1,164
	2021	£1,260	£886	£1,024	£1,311	£1,400	£1,680	£1,245	£1,063	£1,435	£1,321	£1,476	£1,245
	2026	£1,350	£949	£1,097	£1,404	£1,499	£1,799	£1,333	£1,138	£1,537	£1,415	£1,581	£1,334
	2031	£1,447	£1,018	£1,176	£1,505	£1,607	£1,928	£1,429	£1,220	£1,647	£1,517	£1,695	£1,430
	2035	£1,530	£1,076	£1,243	£1,591	£1,699	£2,039	£1,511	£1,290	£1,742	£1,604	£1,792	£1,511
Hotels													
	2014	£156	£93	£121	£166	£191	£239	£171	£133	£193	£183	£198	£159
	2016	£163	£97	£126	£173	£200	£250	£179	£139	£201	£191	£207	£166
	2021	£175	£103	£135	£185	£214	£267	£191	£149	£215	£204	£221	£178
	2026	£187	£111	£144	£199	£229	£286	£205	£159	£231	£219	£237	£190
	2031	£200	£119	£154	£213	£245	£307	£219	£171	£247	£234	£254	£204
	2035	£212	£126	£163	£225	£259	£324	£232	£180	£261	£248	£268	£215
Hair & personal grooming													
	2014	£91	£59	£76	£109	£119	£150	£99	£77	£122	£107	£126	£100
	2016	£95	£62	£79	£114	£125	£157	£104	£80	£127	£112	£132	£104
	2021	£102	£66	£85	£122	£133	£168	£111	£86	£136	£120	£141	£111
	2026	£109	£71	£91	£130	£143	£180	£119	£92	£146	£128	£151	£119
	2031	£117	£76	£97	£140	£153	£193	£127	£99	£156	£137	£162	£128
	2035	£124	£80	£103	£148	£162	£204	£135	£104	£165	£145	£171	£135

Total leisure expenditure (£M)

		1a	1b	2	3	4	5	6	7	8	9	10	11	Total
Recreational & cultural services														
	2016	£43.03	£60.26	£17.08	£35.71	£39.87	£30.00	£15.36	£20.27	£39.08	£31.50	£16.67	£21.30	£370.16
	2021	£47.90	£67.07	£18.97	£39.67	£44.38	£33.39	£17.09	£22.56	£42.98	£34.64	£18.52	£23.39	£410.57
	2026	£53.28	£74.61	£21.07	£44.04	£49.37	£37.15	£19.01	£25.10	£47.29	£38.11	£20.56	£25.68	£455.27
	2031	£59.25	£82.97	£23.38	£48.88	£54.90	£41.31	£21.14	£27.91	£52.03	£41.93	£22.82	£28.21	£504.75
	2035	£64.44	£90.24	£25.40	£53.09	£59.71	£44.93	£23.00	£30.36	£56.15	£45.25	£24.79	£30.39	£547.75
Restaurants, cafes etc.														
	2016	£125.72	£92.58	£24.61	£64.85	£63.29	£73.25	£30.60	£28.26	£77.49	£52.59	£36.26	£38.44	£707.95
	2021	£139.93	£103.04	£27.33	£72.03	£70.44	£81.53	£34.06	£31.46	£85.23	£57.84	£40.27	£42.19	£785.36
	2026	£155.66	£114.63	£30.35	£79.97	£78.36	£90.70	£37.89	£35.00	£93.76	£63.63	£44.72	£46.33	£871.00
	2031	£173.10	£127.47	£33.68	£88.77	£87.14	£100.86	£42.14	£38.92	£103.17	£70.02	£49.63	£50.89	£965.78
	2035	£188.27	£138.64	£36.59	£96.41	£94.78	£109.70	£45.83	£42.33	£111.32	£75.56	£53.91	£54.83	£1,048.15
Hotels														
	2016	£17.42	£10.80	£3.23	£9.17	£9.66	£11.65	£4.70	£3.95	£11.63	£8.13	£5.43	£5.48	£101.25
	2021	£19.39	£12.02	£3.59	£10.19	£10.75	£12.97	£5.23	£4.40	£12.79	£8.94	£6.03	£6.01	£112.31
	2026	£21.57	£13.37	£3.99	£11.31	£11.96	£14.43	£5.81	£4.89	£14.07	£9.83	£6.69	£6.60	£124.54
	2031	£23.99	£14.87	£4.43	£12.55	£13.30	£16.05	£6.46	£5.44	£15.49	£10.82	£7.43	£7.25	£138.08
	2035	£26.09	£16.17	£4.81	£13.63	£14.47	£17.45	£7.03	£5.92	£16.71	£11.67	£8.07	£7.82	£149.84
Hair & personal grooming														
	2016	£10.16	£6.93	£2.04	£6.03	£6.02	£7.32	£2.73	£2.29	£7.35	£4.77	£3.47	£3.43	£62.52
	2021	£11.31	£7.71	£2.26	£6.69	£6.71	£8.15	£3.03	£2.55	£8.08	£5.24	£3.85	£3.77	£69.35
	2026	£12.59	£8.58	£2.51	£7.43	£7.46	£9.07	£3.38	£2.83	£8.89	£5.77	£4.28	£4.14	£76.90
	2031	£13.99	£9.54	£2.79	£8.25	£8.30	£10.08	£3.75	£3.15	£9.78	£6.34	£4.75	£4.54	£85.26
	2035	£15.22	£10.37	£3.03	£8.96	£9.02	£10.96	£4.08	£3.42	£10.55	£6.85	£5.16	£4.90	£92.53

Notes

2014 prices

Per capita expenditure derived from Experian MMG3 2016 and grown based on Experian Retail Planner Briefing Note 13 (Figure 1a)

Recreation and cultural services derived from Experian categories 'Cultural services', 'Games of chance' and 'Recreational and sporting services'

Expenditure on hotels derived from Experian category 'Accommodation services' but excludes sub-category 'Holidays abroad per person'

Central Bedfordshire Retail and Leisure Study Update 2016

Table 14: Food and drink capacity

		2016	2021	2026	2031	2035
Available expenditure and expenditure retention by Central Bedfordshire						
A	Total study area expenditure on food and drink (£m)	£708	£785	£871	£966	£1,048
B	Current market share of outlets in Central Bedfordshire (%)	19.3%	19.3%	19.3%	19.3%	19.3%
C	Retained expenditure in Central Bedfordshire (£m)	£137	£152	£168	£186	£202
D	Inflow expenditure to Central Bedfordshire £m)	0.0	0.0	0.0	0.0	0.0
Claim on expenditure from turnover of food & drink outlets in Central Bedfordshire (2)						
E	Turnover of food & drink outlets in Central Bedfordshire (£m)	£137	£137	£137	£137	£137
F	Growth in turnover of existing outlets (£m)	£0.00	£2.75	£5.56	£8.43	£10.77
Claim on expenditure from commitments to new floorspace						
G	Commitments	£0.00	£0.00	£0.00	£0.00	£0.00
Residual expenditure available to support new floorspace (4)						
H	Residual expenditure (£m)	£0.00	£12.19	£25.90	£41.33	£54.89
Food and drink floorspace requirements for Central Bedfordshire (5)						
I	Assumed gross sales density for new food and drink floorspace (£/sqm)	£6,000	£6,121	£6,244	£6,370	£6,473
J	Gross food and drink floorspace requirement (sqm net)	0	1,991	4,148	6,488	8,480

Notes

A Table 12
B CBRS
C A*B
D Expenditure spent in outlets in Central Bedfordshire from beyond the study area and is assumed to be nil for the purposes of this assessment
E C+D in 2016
F Growth in turnover of existing floorspace forecast to increase by 0.4% per annum to 2035
G No specific figures provided for A3-5 development
H C+D-E-F-G
I Efficiency growth of 0.4% per annum to 2035
J H/I

APPENDIX C RECOMMENDED POLICY WORDING

Policy 11: Town Centre Uses

All proposals should have regard to the Retail Hierarchy.

Within the identified town centre boundaries, the Council will seek to retain A1 uses at ground floor level. Proposals for changes of use, or redevelopment of properties, away from A1 uses to A2, A3, A4 or A5 uses will be granted providing that they meet all of the following criteria:

- the proposed use would be appropriate within a town centre setting ~~and would have a level of customer attraction equivalent to an A1 (retail) use~~;
- there is not an existing ~~over-~~concentration of such uses within the town centre;
- the proposed use would positively enhance the vitality of the town centre by extending the range of facilities offered and/or stimulating activity outside normal shopping hours; and
- the proposed use maintains an appropriate window display to avoid the creation of a ‘dead’ frontage.

Above ground floor level, proposals for residential (C3) and general office space (B1a), will be encouraged.

The Sequential Test will be applied to proposals for retail uses that are not in a primary shopping area and to proposals for office and leisure uses that are not within a designated town centre boundary.

Impact Assessments will be required for all retail, office and leisure proposals over 500m² gross external floorspace that are outside a designated town centre boundary.

Proposals for ~~specialist~~ retailing in out-of-centre locations ~~outside town centre boundaries~~ will be considered, in conjunction with Policy 7, on a site-by-site basis taking into account the following:

- the suitability of the site;
- the impact on the town centre; and
- the potential increase in traffic generation.

Planning conditions will be used to restrict the opening hours of new out of centre A5 uses that are to be located within 400m of schools and sixth form colleges. These establishments will not be permitted open between 12:00-14:00 hours and between 15:00-17:00 hours, Monday to Friday.

Policy 12: Retail for Neighbourhood Centres and the Rural Area

In order to support vibrant and diverse neighbourhoods and the rural economy, proposals for retail uses within existing neighbourhood centres and villages will be approved subject to the following criteria:

- the proposal is of a suitable scale;
- the site is an appropriate location; and
- the proposal would not result in unsustainable levels of traffic generation.

Proposals for the change of use or re-development of shops or public houses in existing neighbourhood centres or villages which would result in the loss of such facilities, will not be permitted unless:

- there are other facilities performing the same or similar function within easy walking distance of the community; and
- the applicant provides evidence that there is no realistic prospect of the use continuing, even if permission is refused.

Proposals for retail premises such as local farm shops which are located outside of settlement boundaries will also be considered against the above criteria.

~~Planning conditions will be used to restrict the opening hours of new out of centre A5 uses that are to be located within 400m of schools and sixth form colleges. These establishments will not be permitted open between 12:00-14:00 hours and between 15:00-17:00 hours, Monday to Friday.~~

Policy 13: Dunstable Town Centre

The town centre is the preferred location for new retail development and other forms of development, such as leisure and entertainment, offices, arts, culture and tourism.

~~Planning permission will be granted for additional retail floorspace and other uses appropriate within town centres as defined in national policy within the existing town centre boundaries and, subject to the sequential approach, edge of centre locations.~~

Consideration should also be given to the retail hierarchy and the sequential approach as outlined in Policy 11.

Proposals should reflect the scale and characteristics of the existing centre, protect and enhance the towns heritage assets and should be subject to a Traffic Impact Assessment.

Policy 14: Town Centre Development

<u>In addition to Policy 11, d</u>evelopment proposals should be in accordance with the principles and objectives of:

- the two endorsed development briefs for Leighton Buzzard;
- the Houghton Regis Masterplan SPD;

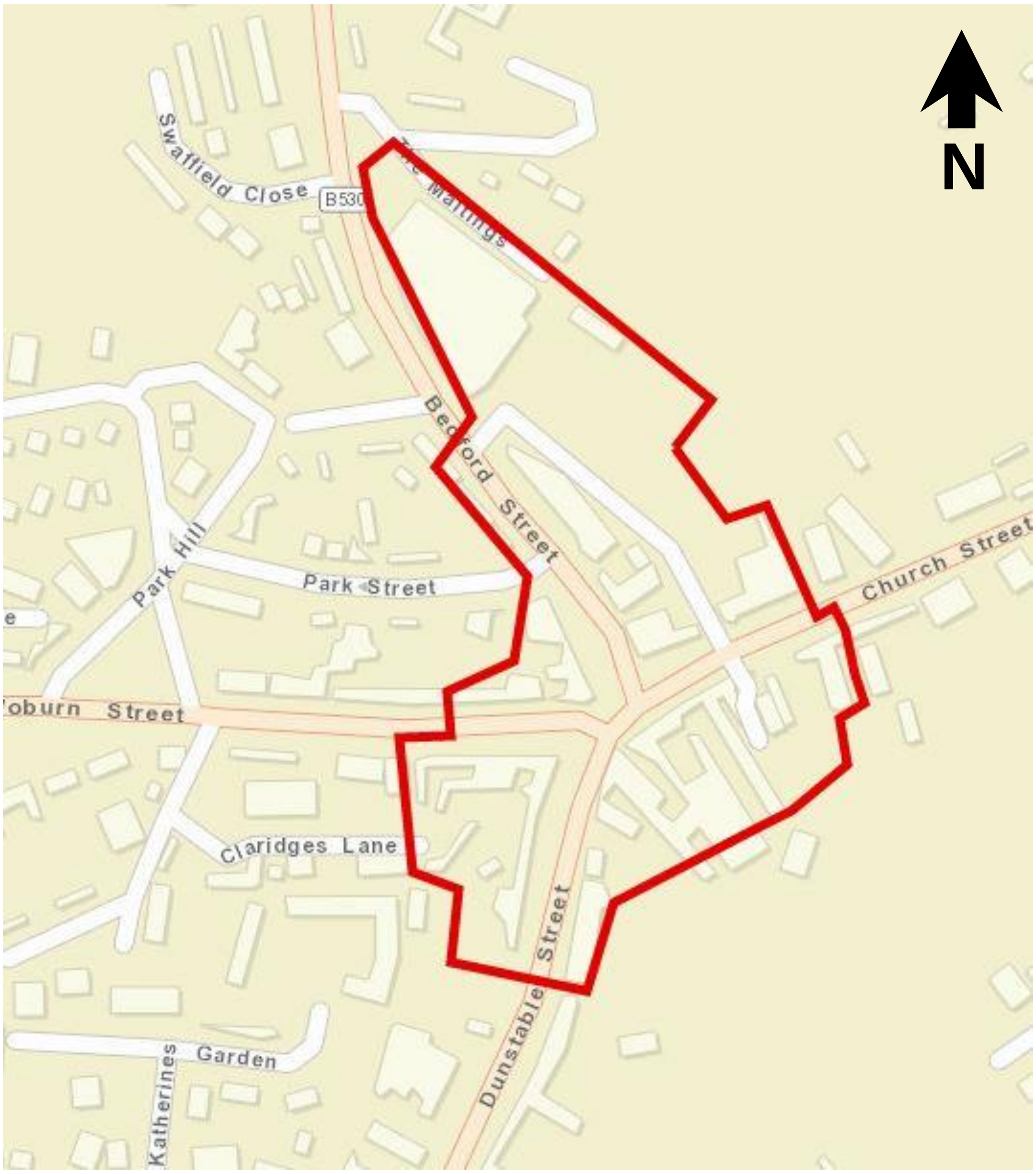
- the Biggleswade Town Centre Masterplan SPD; and
- the Flitwick Framework Plan and Indicative Masterplan.

Development proposals elsewhere in these towns should complement and not prejudice development proposed. The Council will seek to secure financial contributions to mitigate any significant adverse impacts on existing town centres or planned investment ~~and should make a financial contribution towards their development~~ where possible.

Where town centres do not have adopted or endorsed masterplans or development briefs, the Council will seek to support sustainable development in town centres and retain existing retail uses in line with Policy 11.

APPENDIX D RECOMMENDED BOUNDARIES

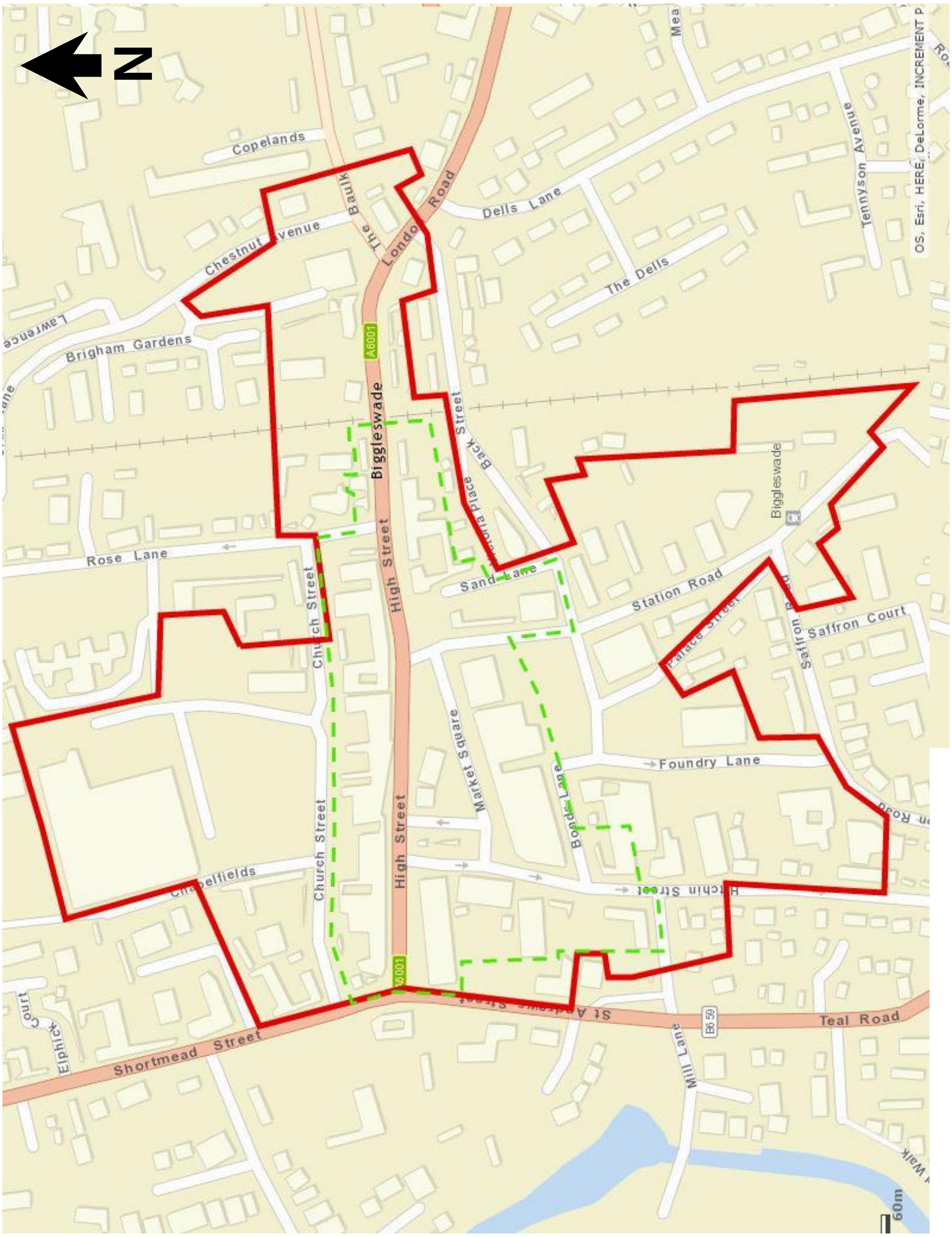
Ampthill



Town centre boundary

Primary shopping area

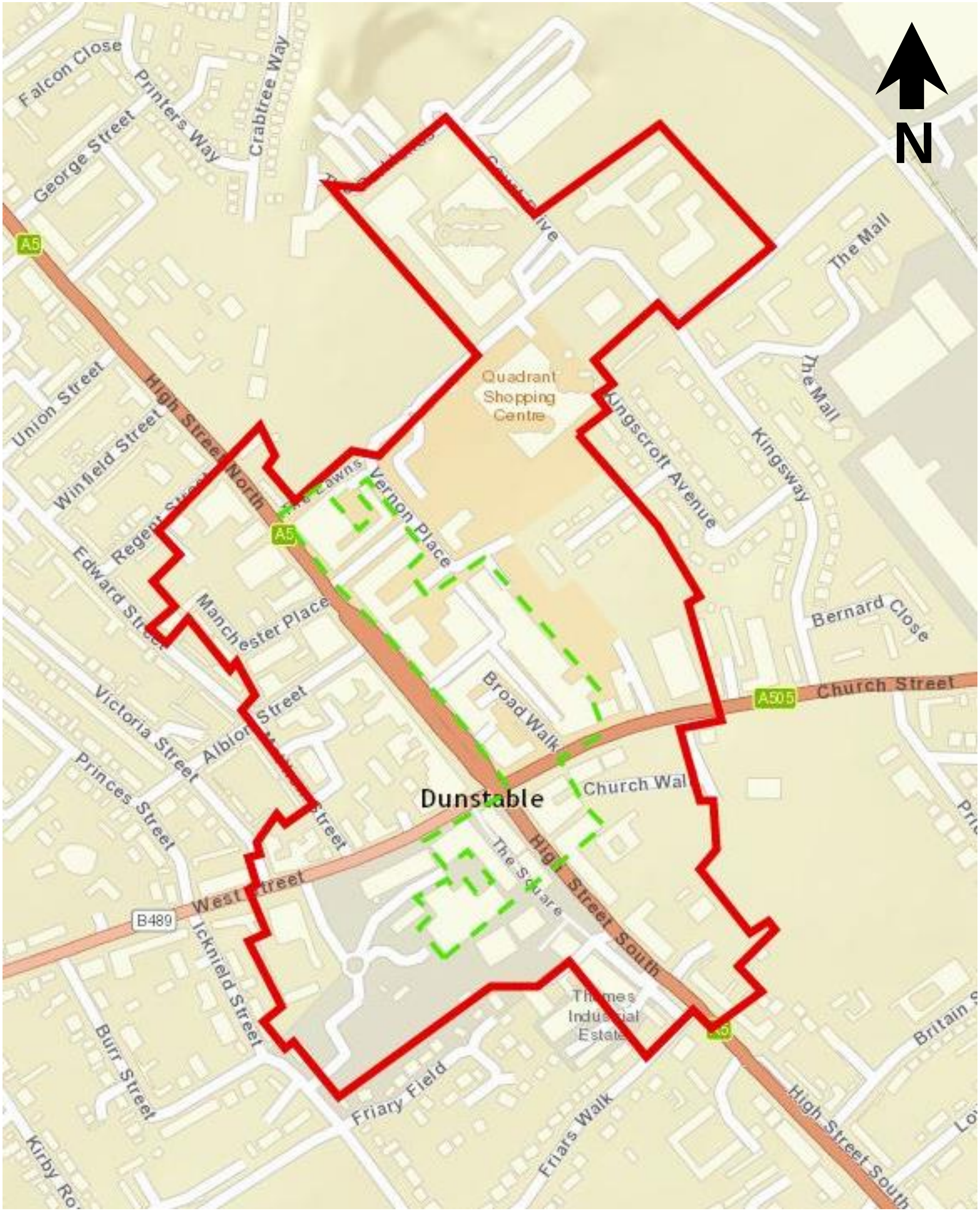
Biggleswade



Town centre boundary

Primary shopping area

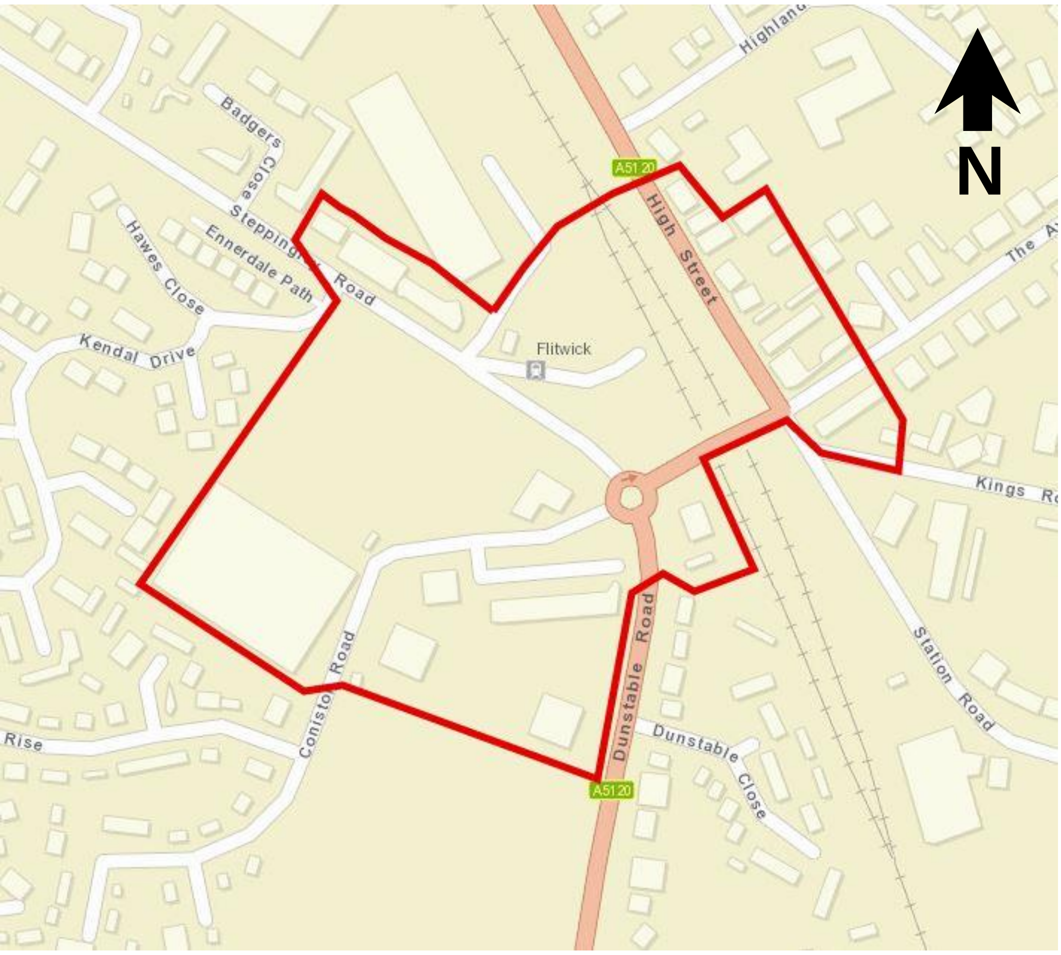
Dunstable



Town centre boundary

Primary shopping area

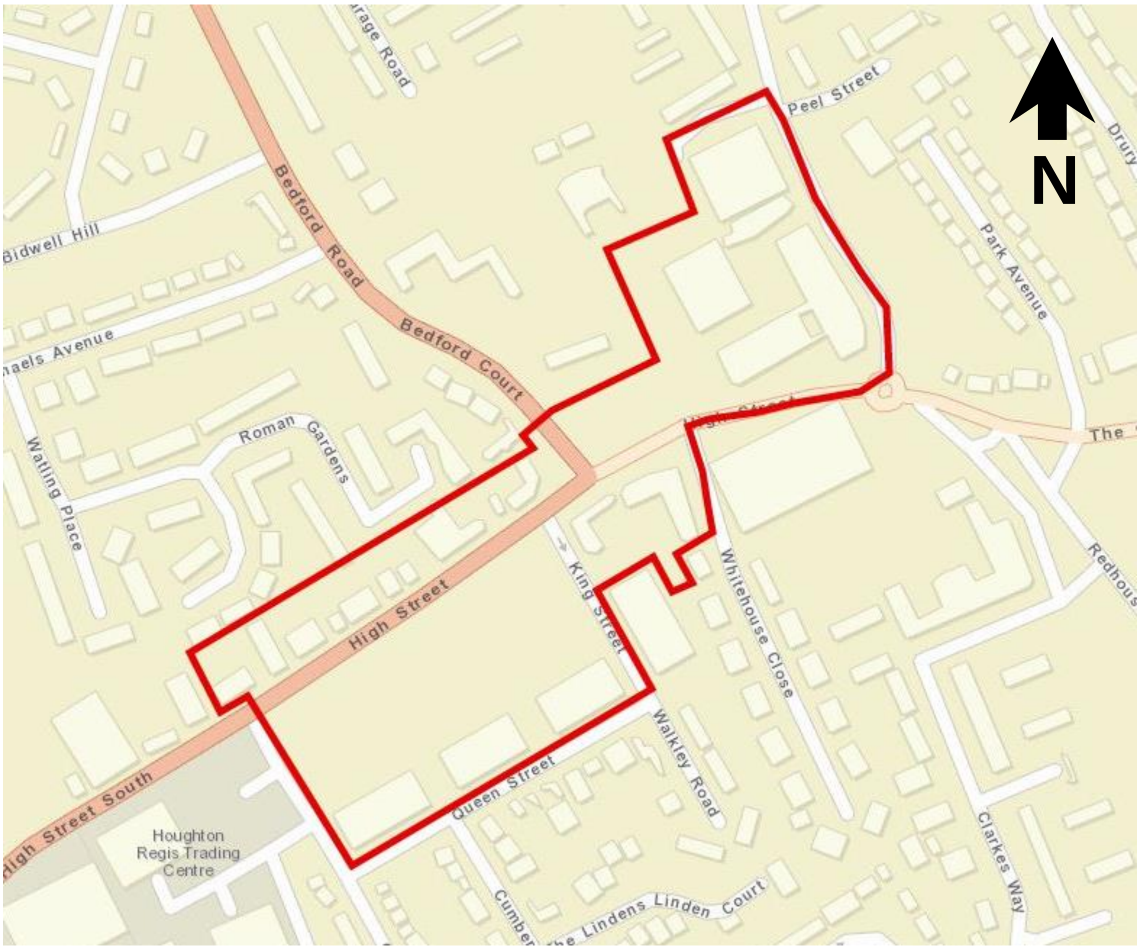
Flitwick



Town centre boundary

Primary shopping area

Houghton Regis



Town centre boundary

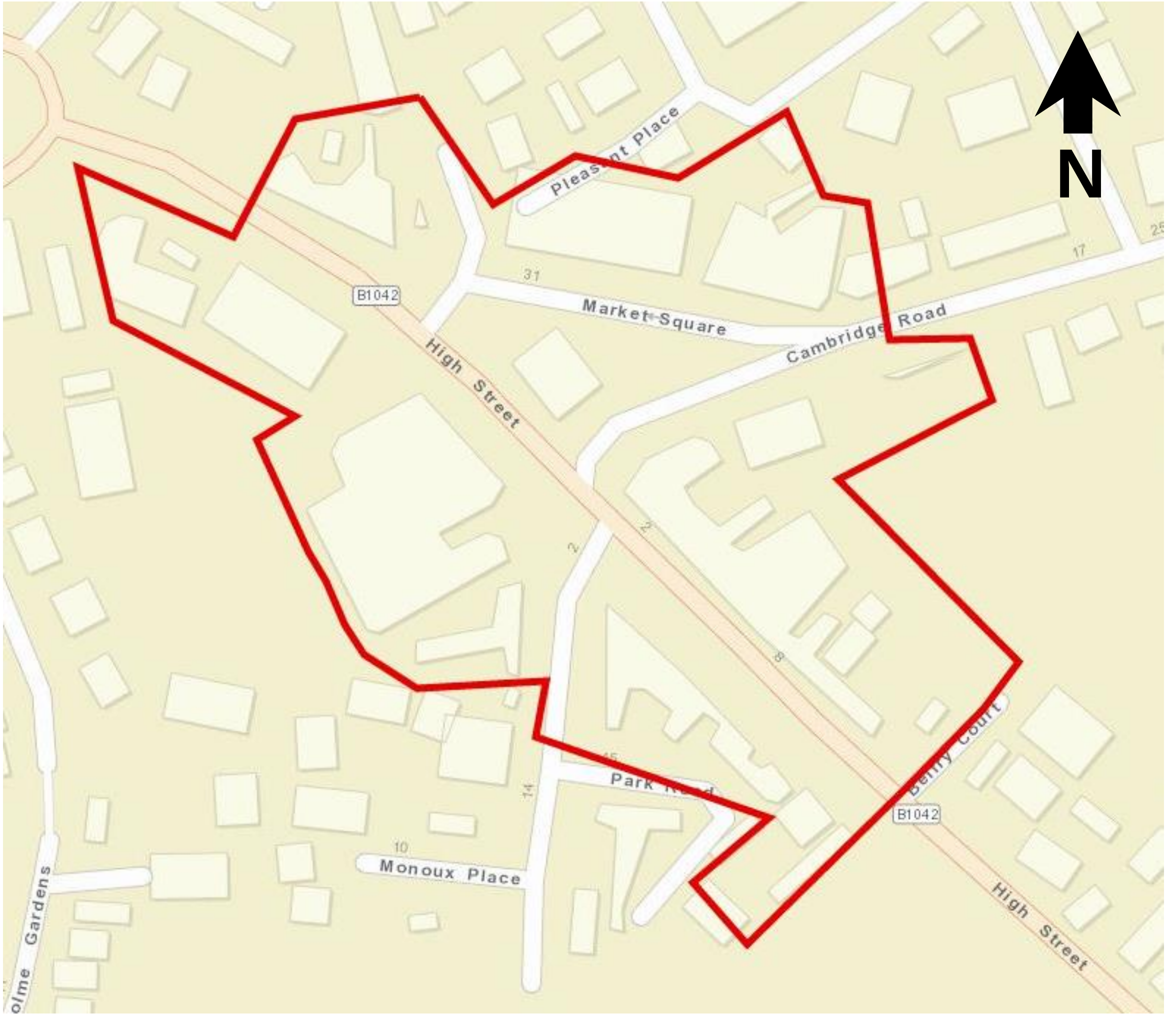
Primary shopping area

Leighton Buzzard

Town centre boundary

Primary shopping area

Sandy



Town centre boundary

Primary shopping area