Rugby Borough Council Retail & Leisure Study

July 2008

Pan-Leisure
CONSULTING LIMITED

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Rugby Borough Council Retail & Leisure Study

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1. Introduction and Council Brief

1.1 Drivers Jonas, in association with Pan Leisure Consulting Ltd, were instructed in October 2007 to undertake a Retail & Leisure Study for Rugby Borough Council.

1.2 In accordance with the Consultants' Brief dated August 2007, the Drivers Jonas and Pan Leisure study forms part of the evidence base that will be used to support retail and town centre policies within the emerging Local Development Framework (LDF) covering the Borough. The study has been undertaken in accordance with the requirements set out within Planning Policy Statement 6: Planning for Town Centres (PPS6), and is intended to assist the Council to develop a robust framework for formulating justified policies and proposals within the LDF.

1.3 The Study includes qualitative and quantitative assessments of Rugby's retail and leisure provisions and identification of gaps. The Study also provides a detailed appraisal of the need for further development for retail and leisure facilities within the Borough up to 2026, and seeks to address deficiencies in provision and the capacity of Rugby Town Centre to accommodate new development.

1.4 The scope of the Study and the basis of the joint appointment of Drivers Jonas and Pan Leisure was confirmed in writing with the Borough Council in November 2007.

1.5 The structure of this Study report is as follows:

- Section 2 briefly examines the Planning Policy Context at national local level;
- Section 3 examines the Regional, Strategic and Local Context
- Section 4 analyses the results of the household & town centre surveys undertaken in November/December 2007 to inform the Study;
- Section 5 gives an overview of the health of Rugby Town Centre as well as an overview of out of town facilities and nearby centres;
- Sections 6 assesses the need for further comparison & convenience retail floorspace in the Town Centre;
- Section 7 gives a commentary on the leisure market;
- Section 8 assesses the need for further leisure floorspace in the Town Centre;
- Section 9 provides a summary appraisal of potential town centre development sites;
- Sections 10 & 11 set out the Study's Conclusions and Recommendations;
- Section 12 outlines a number of recommendations for the future vitality of Rugby Town Centre; and
- Section 13 outlines a recommended framework for review and monitoring.

2. National Planning Policy Context

Central Government Planning Policy Guidance

2.1 The Retail and Leisure Study undertaken jointly by Drivers Jonas and Pan Leisure is firmly based on current Government guidance on retailing and town centres including as expressed in Planning Policy Statement 6: Planning for Town Centres (PPS6) 2005, and other relevant national planning policy documents.

PPS1: Delivering Sustainable Development (2005)

2.2 PPS1 outlines key principles for the delivery of sustainable development. These include:

- Promoting national, regional, sub-regional and local economies by providing a positive planning framework for sustainable economic growth to support efficient, competitive and innovative business, commercial and industrial sectors.
- Promoting urban and rural regeneration to improve the well being of communities by improving facilities, promoting high quality and safe development and creating new opportunities for the people living in those communities. This includes promoting mixed use developments in locations that allow the creation of linkages between different uses thereby creating more vibrant places.
- Promoting communities which are inclusive, healthy, safe and crime free, whilst respecting the diverse needs of communities and the special needs of particular sectors of the community.
- Bringing forward sufficient land of a suitable quality in appropriate locations to meet the expected needs for housing, for industrial development, for the exploitation of raw materials such as minerals, for retail and commercial development, and for leisure and recreation – taking into account issues such as accessibility and sustainable transport needs, the provision of essential infrastructure, including for sustainable waste management, and the need to avoid flood risk and other natural hazards.
- Providing improved access for all to jobs, health, education, shops, leisure and community facilities, open space, sport and recreation, by ensuring that new development is located where everyone can access services or facilities on foot, bicycle or public transport rather than having to rely on access by car.
- Focussing developments that attract a large number of people, especially retail, leisure and office development, in existing centres to promote their vitality and viability, social inclusion and more sustainable patterns of development.
- Reducing the need to travel and encouraging accessible public transport provision to secure more sustainable patterns of transport development.
- Promoting the more efficient use of land through higher density, mixed use development and the use of suitably located previously developed land and buildings.
- Enhancing as well as protecting biodiversity, natural habitats, the historic environment and landscape and townscape character.
- Addressing the causes and impacts of climate change, the management of pollution and natural hazards, the safeguarding of natural resources, and the minimisation of impacts from the management and use of resources.

PPS6 – Planning for Town Centres (2005)

2.3 Planning Policy Statement 6 (PPS6) sets out the Government's policy on planning for the future of town centres. The document covers town centres and the main town centre uses which are listed as:

- Retail (including warehouse clubs and factory outlet centres);
- Leisure, entertainment facilities, and the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls);
- Offices, both commercial and those of public bodies; and
- Arts, culture and tourism (theatres, museums, galleries and concert halls, hotels, and conference facilities).

2.4 Section 2 of Planning for Town Centres PPS6 published in March 2005 sets out specific requirements in respect of Local Plans, which because of their particular relevance are quoted below.

> *"The Role of Plans at the Local Level*
>
> *2.15 Local planning authorities should adopt a positive and proactive approach to planning for the future of all types of centres within their areas. Having regard to the regional spatial strategy and reflecting their community strategy, local planning authorities should, through the core strategy development plan document, set out a spatial vision and strategy for the network and hierarchy of centres, including local centres, within their area, setting out how the role of different centres will contribute to the overall spatial vision for their area.*
>
> *2.16 Local planning authorities should work in conjunction with stakeholders and the community to:*
>
> - *assess the need for new floorspace for retail, leisure and other main town centre uses, taking account of both quantitative and qualitative considerations;*
> - *identify deficiencies in provision, assess the capacity of existing centres to accommodate new development, including, where appropriate, the scope for extending the primary shopping area and/or town centre, and identify centres in decline where change needs to be managed;*
> - *identify the centres within their area where development will be focused, as well as the need for any new centres of local importance, and develop strategies for developing and strengthening centres within their area;*
> - *define the extent of the primary shopping area and the town centre, for the centres in their area on their Proposals Map (see Annex A);*

> - *identify and allocate sites in accordance with the considerations set out below (paragraphs 2.28–2.51);*
> - *review all existing allocations and reallocate sites which do not comply with this policy statement;*
> - *develop spatial policies and proposals to promote and secure investment in deprived areas by strengthening and/or identifying opportunities for growth of existing centres, and to seek to improve access to local facilities (paragraphs 2.55–2.59); and*
> - *set out criteria-based policies, in accordance with this policy statement, for assessing and locating new development proposals, including development on sites not allocated in development plan documents".*

2.5 Chapter 4 of PPS6 states that comprehensive, relevant and up-to-date monitoring is essential to the effective planning and management of town centres. In order to achieve this it suggests that the following matters should be kept under regular review:

- The network and hierarchy of centres (at both regional and local levels);
- The need for further development; and
- The vitality and viability of centres (at the local level).

2.6 In addition to PPS6 there are a number of documents produced by Government and other associated agencies which provide further detail on specific strategies for town centre uses beyond retail. An analysis of these additional documents, and their potential relevance to Rugby Town Centre is included in Appendix 1.

Proposed Changes to PPS6 – Planning for Town Centres (July 2008)

2.7 A consultation document relating to Proposed Changes to Planning Policy Statement 6: Planning for Town Centres (PPS6) was published in July 2008. The document seeks to revisit how specific parts of the 2005 guidance are working in practice and to refine and improve the effectiveness of its policies. Whilst the principles of the sequential approach to site selection and the assessment of a proposal's impact on existing centres are maintained and strengthened, there are a number of proposed policy changes.

2.8 The Statement continues to support the well-established town centres first approach and is clear that town centre development planning is not just about the larger towns. The consultation document sets out the need for clear, robust strategies for centres of all sizes.

2.9 It is stated that significant adverse impacts "*will normally justify the refusal of planning permission*". However, the proposed changes go on to suggest that where adverse impacts can be outweighed by wider economic, social and environmental benefits, proposals should be considered favourably. In particular, the Statement links to the objectives of draft PPS4: Planning for Sustainable Economic Development and the wider need to plan for sustainable economic growth and support employment creation. Evidence of a proposal's level of investment, job creation, ability to stem expenditure leakage and other wider economic effects will be taken into consideration in the determination of the planning application.

2.10 The Proposed Changes to PPS6 have been issued for public consultation, and currently hold limited weight in the context of the preparation of this Retail and Lesiure Study report. The main themes and objectives of the consultation document are however consistent with the key recommendations of this Study.

PPG13 – Transport (2001)

2.11 Government guidance on transport reinforces PPS6, directing retail and leisure development to existing centres, and to locations well served by a choice of means of transport to reduce reliance on the private car.

2.12 Revised PPG13 was published in March 2001. It advises Local Planning Authorities (LPA's) to deliver the objectives of the guidance by:

- Promoting more sustainable transport choices for both people and for moving freight;
- Promoting accessibility to jobs, shopping, leisure facilities and services by public transport, walking and cycling; and
- Reducing the need to travel, especially by car.

2.13 In terms of jobs, shopping, leisure and services, a key planning objective is that these uses are promoted in locations that are highly accessible by public transport, walking and cycling. Where development comprising jobs, shopping, leisure and services is proposed outside the preferred locations in the development plan, the onus will be on the developer to demonstrate why they cannot fit into the preferred locations, and to illustrate how the accessibility of the proposed development by all modes compares with other possible sites.

Summary

2.14 The documents detailed in this section indicate the current national planning policy guidance and relevant policy tests upon which this Retail and Leisure Study is based.

3. Regional, Strategic and Local Context

West Midlands Regional Spatial Strategy (RSS)

3.1 The current West Midlands Regional Spatial Strategy (RSS), formerly RPG 11 was published in 2004. The process of reviewing the current RSS is well underway, and the emerging policies and development allocations for the region, and the Rugby area in particular, will have significance for this Study, as summarised in this section.

Development Strategy

3.2 The RSS states that the overall vision for the West Midlands is

> *"one of an economically successful, outward looking and adaptable Region, which is rich in culture and environment, where all people, working together, are able to meet their aspirations and needs without prejudicing the quality of life of future generations."*

3.3 Four major challenges are identified for the Region:

- Urban Renaissance – developing the Main Urban Areas (MUAs) in such a way that they can increasingly meet their own economic and social needs in order to counter the unsustainable outward movement of people and jobs facilitated by previous strategies;
- Rural Renaissance – addressing more effectively the major changes which are challenging the traditional roles of rural areas and the countryside;
- Diversifying and modernising the Region's economy – ensuring that opportunities for growth are linked to meeting needs and that they help reduce social exclusion; and
- Modernising the transport infrastructure of the West Midlands – supporting the sustainable development of the Region.

3.4 The objectives that provide a context for the policies in the Strategy, include the following:

- to secure the regeneration of the rural areas of the Region;
- to create a joined-up multi-centred Regional structure where all areas/centres have distinct roles to play;
- to support the cities and towns of the Region to meet their local and sub-regional development needs;
- to support the diversification and modernisation of the Region's economy while ensuring that opportunities for growth are linked to meeting needs and reducing social exclusion; and
- to promote the development of a network of strategic centres across the Region.

Retail Strategy

3.5 The adopted RSS identifies Rugby as one of five sub-regional foci. In respect of these foci, the approach of the current RSS is to encourage residential development, rural regeneration and a balanced network of town and city centres, serving as a focus for major retail, leisure and office developments, and acting as service centres for their rural hinterland.

3.6 The RSS states that town and city centres are at the heart of communities throughout the Region and that their future health and attractiveness will be a major determinant of the quality of life for everyone.

3.7 Policies PA11 to PA13 address the key strategic issues affecting town and city centres. Under Policy PA11, Rugby is identified as one of the 25 strategic town and city centres which will be the focus for:

> *"i) Major retail developments (i.e. those of more than 10,000 sq m gross floorspace, excluding floorspace dedicated to the retailing of convenience goods);*
>
> *ii) Uses which attract large numbers of people including major cultural, tourism, social and community venues; and*
>
> *iii) Large scale leisure and office (Class B1a) developments (i.e. those of 5,000 sq m or more gross floorspace".*

3.8 Policy PA11 also states that there are many other centres within the region that meet local needs and states that local authorities should be proactive in encouraging appropriate development to maintain and enhance their function as town centres.

3.9 In approving the RSS in June 2004, the Secretary of State identified a number of policy issues that needed to be addressed in future revisions to the document (see para 1.33 of RPG 11). The Revisions comprise three phases:

- Phase One - Black Country Study;
- Phase Two - Housing figures, centres, employment land, transport and waste;
- Phase Three - Rural services, recreational provision, regionally significant environmental issues and provision of a framework for Gypsies and Travellers sites.

West Midlands RSS - Phase Two Revisions

Spatial Options Consultation Report, January 2007

3.10 This Consultation report was published in January 2007 and identified three growth options for the Region with new dwelling requirements for the period 2001 to 2026 ranging from 381,000 to 575,000.

3.11 The objective of the Spatial Options in terms of strategic centres was to identify investment priorities within the strategic network of centres. The Report was informed by the findings of the Regional Centres Study prepared by Roger Tym and Partners (RTP).

Regional Centres Study, Roger Tym & Partners, 2006

3.12 The RTP Regional Centres Study was published in 2006 to assist the Regional Planning Board in identifying the centres in the Region where major new retail, leisure and office development should be focussed.

3.13 The Study uses adopted Policy PA11 of the RSS to identify the regional centres to be examined. Rugby is the only centre in Rugby Borough covered in the study, and is classed as a fourth level centre and the smallest (in retail floorspace terms) of the five sub-regional foci identified in the existing RSS.

3.14 As part of the qualitative assessment of Rugby contained in the RTP Study, comparison goods turnover is noted as £168.83m (2001 prices) with the degree of competition/choice for catchment residents identified as medium. The Study also states that Rugby is one of four centres that perform least well in relation to key indicators, and thus consider that it is vulnerable to a decline in status.

3.15 The localised comparison goods market share for Rugby is demonstrated in table 6.3 of the final report and detailed below:

Zone	Strategic Centre	Comp Gds Turn from Primary Zones	Comp Gds Exp Primary Zones (£m)	Comp Gds Turn from Study Area	Meas 1	Meas 2
		A	B	C	A/B %	A/C %
30	Rugby	£125m	£194.1	£160.1	64%	78%

Measure 1: comparison goods turnover drawn from primary zones as a percentage of the comparison goods expenditure of residents in these primary zones; and

Measure 2: comparison goods turnover drawn from primary zones as a percentage of all comparison goods turnover drawn from the West Midlands Study Area

3.16 The study noted that Rugby was one of the ten most locally dominant centres for comparison shopping in the region with 64% of turnover drawn from the primary zone (as a percentage of primary zone expenditure, as shown in the above table). The town is also identified as being heavily dependent on its Primary Catchment Area with 78% of turnover drawn from this area.

3.17 Table 8.1 of the study sets out the recommendations for the distribution of retail and office needs across the network of strategic centres.

3.18 In regard to the retail sector, the range of comparison goods floorspace requirements for Rugby up to 2021 is indicated. The Study draws on option modelling to calculate floorspace requirements based on the six growth distribution options which performed best in the accompanying evaluation matrix. These options were focussing growth on the Metropolitan Urban Areas (MUA), opportunistic, marker share uplift for Black Country Centres (two variations), expenditure convergence with national average for MUA zones and uplift for MUA and Sub-Regional Foci Centres.

3.19 Under the six distribution options that performed best in the evaluation matrix, the study found that there is a requirement of between 5,000 sq m and 15,000 sq m sales area for Rugby.

3.20 In terms of other town centre uses, the Study notes at Table 8.2 that Rugby is a high priority location for additional cinema screen provision. Rugby it notes, has a surplus population in relation to the theoretical requirement of one screen for 20,000 people.

Regional Centres Study Update, Roger Tym & Partners, 2007

3.21 An update to the Roger Tym & Partners Study was published in November 2007 and relates to comparison retail floorspace needs.

3.22 The Update Report provides floorspace requirements for Rugby based on both RSS and ONS based assessments of quantitative need in the comparison goods sector. The table below summarises these figures up to 2021.

	Minimum sq.m. sales (net)	Maximum sq.m. sales (net)	Mid-point sq.m. sales (net)
ONS Based Requirements	20,000	21,000	20,500
RSS Based Requirements	20,000	20,000	20,000

3.23 The Study then rolls forward the 2021 figures to 2026, although the report urges caution given the exponential impact of some key data inputs, such as expenditure growth rates.

	Minimum sq.m. sales (net)	Maximum sq.m. sales (net)	Mid-point sq.m. sales (net)
ONS Based Requirements	26,000	31,000	28,500
RSS Based Requirements	25,000	30,000	27,500

3.24 The Study states that it is anticipated that the Regional Assembly will prefer the RSS based assessments of quantitative need in the comparison goods sector as opposed to the ONS figures. As such the updated Study sets out that greater confidence can be seen in the RSS based assessment up to 2021 as opposed to 2026

Phase Two: Draft Preferred Option

3.25 The Phase 2 Preferred Option was endorsed by the Regional Partnership at its meeting on 22 October 2007. The preferred option was submitted to the Secretary of State on 21 December 2007 as the Draft Revision to the RSS. All objections and representations will then be considered by a Panel appointed by the Secretary of State to undertake at 'Examination-in-Public' scheduled for Easter 2009.

3.26 Policy PA 12A of the Phase 2 Preferred Option states that Rugby should plan for the construction of 25,000 sq m gross comparison retail floorspace between 2006 and 2021, with an additional 15,000 sq.m. between 2021 and 2026. These floorspace requirements are based on the West Midlands Centres Study and Update undertaken by Roger Tym and Partners and are subject to further minor amendment.

West Midlands RSS - Phase Three Revisions

3.27 A Scoping Report for Phase Three was published in January 2007. The Draft Project Plan was to launch Phase Three in Autumn 2007 (although this is yet to be published), with the Preferred Option timetabled to be launched in Summer 2009.

Rugby Borough Council Adopted Local Plan (2006)

3.28 The Rugby Local Plan was adopted in July 2006. The Local Plan includes a vision for Rugby as follows:

- a prosperous Borough that provides opportunities for work, relaxation and leisure;
- a Borough taking care of the environment by making environmentally informed decisions and enhancing the green areas in and around Rugby;
- a Borough which recognises the value of the rural area and ensures its fair share of local services provision, including the protection of existing services;
- a Borough which adopts a more integrated and sustainable approach to transport;
- a vibrant town centre which is a desirable place to shop, live and recreate, is distinct from other towns and as such maintains its primary character as a market town; and
- an inclusive Borough which engages its communities and works to ensure that people live free from fear of crime and anti-social behaviour, avoidable ill health and poverty.

3.29 The latest vision for Rugby was published in the Sustainable Community Strategy for the Rugby Area (July 2007).

Development Strategy

3.30 In the light of the above, an overall approach to the location of development within the Borough has been formulated. To take forward the overall thrust of policy contained in the RSS that development should be concentrated within existing settlements, the Plan adopts a sequential approach to the selection of locations for development.

3.31 Policy S1 sets the following approach to locating development:

1st Priority:	Previously developed land within Rugby Urban Area;
2nd Priority:	Greenfield land within Rugby Urban Area;
3rd Priority:	Previously developed land within the defined settlements of Long Lawford and Dunchurch;
4th Priority:	Greenfield land within the defined settlements of Long Lawford and Dunchurch; and
5th Priority:	Extensions to Rugby Urban Area which lie within or adjacent to transport corridors, can be integrated into the fabric of the town, are outside the Green Belt and are easily accessible to town centre services and facilities, and are well served or can be made to be well served by public transport.

Town Centre Strategy

3.32 The adopted Local Plan divides Rugby Town Centre into three distinct zones as follows:

The Town Centre

Within which all appropriate town centre uses will be encouraged to locate.

The Town Centre Shopping Area

Within which all major retail development should be focused.

The Primary Shopping Area

Within which only A1 retail developments will be permitted.

Key Retail Policies

3.33 The town centre zoning approach is intended to reflect the fact that the Town Centre itself covers a relatively large area and whilst the Centre as a whole is considered to be an appropriate location for leisure, entertainment and office uses, it would be more appropriate to locate retail developments within the core of the Town Centre. The defined Town Centre Shopping Area is thus the core of the Town Centre and is regarded as the most appropriate location for retail developments.

3.34 **Policy TCR1** states that proposals for development, redevelopment or change of use in the Primary Shopping Area will only be permitted where the proposed ground floor use is to be exclusively for retail (use class A1) use.

3.35 **Policy TCR2** covers Town Centre Shopping Area uses. It states that within the defined area, retail developments (use class A1-A5) will be permitted only where the proposal satisfies the following criteria:

> *"1. The developer can demonstrate there is a need for the development that cannot be met from suitable alternative sites or buildings within the town centre shopping area; and*
>
> *2. The proposal is within an edge of town centre shopping area location; and*
>
> *3 The proposal would be capable of being made genuinely accessible by a choice of means of transport as well as by car. The development should be easily and safely accessible by pedestrians, cyclists, those with impaired mobility and those using public transport".*

3.36 **Policy TCR3** states that within the town centre, uses within the Use Classes B1, C1, C2, C3, D1 and D2 will be permitted subject to the same criteria as Policy TCR2. The Plan emphasises that locating other town centre uses outside the main shopping area has the potential to improve the vitality and viability of the shopping environment in Rugby.

3.37 In addition to these key policies, the Local Plan also identifies two area of regeneration within Rugby Town Centre and provides policy support for these.

Chapel Street

3.38 The 2003 Rugby Retail Study identified a need for additional retail development in Rugby in the period up to 2011. It also considered that this need would most appropriately be met through a redevelopment of the Chapel Street Area.

3.39 Policy TCR4 states that planning permission will be granted for retail development of the Chapel Street area as defined on the proposals map provided:

> *"1. The proposals would involve the comprehensive redevelopment of the land within the policy area; and*
>
> *2. The proposals would provide for approximately 3,000sq.m. net of convenience goods shopping floorspace and approximately 5,000sq.m. net of comparison goods shopping floorspace".*

Town Centre Gateway

3.40 The Local Plan states that Corporation Street is a high profile and heavily used route through Rugby which separates the commercial area of the town centre to the east from some commercial frontages and housing areas to the west.

3.41 In order to improve the poor environmental condition of some of the land and appearance of some buildings the Council will seek to ensure the enhancement of the environmental quality and character of this important gateway through the consideration of development proposals.

3.42 Policy TCR5 states that any development or redevelopment proposals which would have impact on Corporation Street and surrounding areas in Rugby Town Centre, as shown on the Proposals Map, should:

> *"1. Reflect the scale and character of the buildings in the town centre; and*
>
> *2. ensure good visual links to existing buildings and focal points of note".*

Emerging Rugby Local Development Framework

3.43 Rugby Borough Council is currently in the early stages of the process of preparing a Local Development Framework (LDF) for the Borough, to replace the existing adopted Local Plan (2006). Following an initial period of public consultation on 'Issues' in November 2007, a six week period of public consultation was undertaken from 21 January until 3 March 2008 on 'Issues and Options' for the emerging LDF Core Strategy.

3.44 A Local Development Scheme (LDS) for the emerging Local Development Framework was approved by the Government Office for the West Midlands in March 2007. The LDS sets out a timescale for the publication of Preferred Options consultation in Autumn 2008, leading to the current programmed date for adoption of the Core Strategy in 2010.

3.45 This Retail and Leisure Study has been prepared to inform the preparation of a robust local planning framework, through the emerging LDF Core Strategy and other associated Development Plan Documents and Supplementary Planning Documents, for the future assessment and determination of proposals for significant retail and/or leisure floorspace within the Borough. The Study seeks to provide the evidence base and relevant recommendations for the formulation of Town Centre, retail, and leisure policies and allocations to be included in the emerging LDF. This evidence base and the recommendations arising from this Study will need to be the subject of future review (within 2-3 years) to ensure they remain valid and up-to-date for the purpose of informing decisions relating to retail and leisure development opportunities.

Summary

3.46 This chapter outlines the current Regional Planning guidance which has informed this Study. This includes the West Midlands Regional Spatial Strategy (RSS), which is currently in the process of being revised. The emerging policies and development allocations for the region, and the Rugby area in particular, have significance for this Study. Of particular interest is the findings of the updated Roget Tym & Partners Regional Centres Study (2007) which suggests that based on RSS based requirements, Rugby has a quantitative need of 20,000 sq.m. (net) sales floorspace in the comparison goods sector up to 2021.

3.47 The Borough Council is in the early stages of preparing a new Local Development Framework for the Borough to replace the current adopted Local Plan. Initial public consultation stages have been undertaken for the LDF Core Strategy, which is due to proceed through further consultation and examination and to reach adoption by 2010. This Retail and Leisure Study will have an important role in terms of informing Core Strategy policies relating to the Town Centre, retail, and leisure uses and will provide the evidence base for the allocation of significant additional floorspace to accommodate identified need.

4. Analysis of Survey Results

Summary Review of Results of Shopper Surveys

4.1 To inform the preparation of this Study, a total of 1001 household telephone survey interviews were carried out within the Rugby catchment area, as well as the surrounding areas between 30 November and 5 December 2007. Interviews were conducted by Research & Marketing using their in-house CATI (Computer Assisted Telephone Interviewing) Unit. Respondents were contacted during the day, in the evening and at the weekend.

4.2 The survey was commissioned primarily to establish the shopping patterns and characteristics of the area. Using the catchment area defined in previous studies, and confirmed through liaison with Rugby Borough Council, the catchment area for Rugby was divided into 14 zones based on postcode sector.

4.3 In order to summarise the responses, this section will predominantly focus on the combined results of the 14 zones, although specific regard will be given to individual zone results as necessary.

4.4 A full technical report and copy of the survey can be found in Appendix 2. A plan showing the catchment area used for the survey can be found in Appendix 3.

Convenience Shopping

4.5 Whilst the wide range of answers demonstrates the range of convenience stores available around the catchment area, stores in Rugby still represent the largest volume of responses for main food shopping. The largest single response for the preferred location for convenience shopping was the Sainsburys store at Bilton Fields, Rugby (16.5%), followed by Tesco on Leicester Road (13.9%). Other notable stores were Tesco in Daventry (7.5%) and Morrisons in Coventry (5.6%).

4.6 Although the Sainsburys and Tesco stores in Coventry account for 30.4% of responses across the zones, other stores in Rugby itself account for an additional 11.7% bringing Rugby's combined share of convenience retail spend to 42.1%. This compares to the 16.4% who identified stores in Coventry as the location for their main food shop, and 13.6% who identified Daventry. Such figures suggest that within the catchment, there is an element of convenience retail expenditure leakage, although given the close proximity of major centres such as Coventry and Northampton this is to be expected, particularly in the outer areas of the identified catchment area.

4.7 As could be anticipated the breakdown of the data in individual zones largely relates to their proximity to a major centre. For instance, Zones 3, 4 & 7 which encompass Rugby and its immediate surroundings, saw response rates as high as 55.3% for individual Rugby supermarkets. Conversely, those zones more distant from Rugby such as Zones 1 & 2, but close to Coventry saw extremely low figures for the Rugby supermarkets. For example, only 3.7% of Zone 1 respondents visited either the Sainsburys or Tesco stores in Rugby compared to the all zone average of 30.4%.

4.8 It is interesting to note that 47.3% of respondents state that they do not link trips when undertaking their main food and grocery shop. This figure represents the average across the zones however and in individual zones the figure is as high as 61.1% (Zone 11).

4.9 86.2% of respondents stated that they use a car, either as passenger or driver, to undertake their main food shop. A much smaller percentage of 5.7% use a bus/coach, whilst 5.4% walk.

Comparison Shopping

4.10 Rugby, is the preferred destination for clothes and shoe shopping for residents within the catchment area, with 24.6% of all respondents identifying the town centre or retail parks within the town as their first choice. Daventry, which is also in the Rugby catchment area, was identified by 3.2% of respondents as their first choice location for clothes and shoe shopping. Whilst Rugby gained the highest responses, there is evidence of expenditure leakage beyond the catchment, most noticeably Coventry (13.6%), Leamington Spa (8.4%) and Northampton (5.9%). In addition Banbury, Leicester, Fosse Park, Nuneaton and Birmingham also polled results of between 2% and 5%.

4.11 Special forms of trading (internet, catalogue, TV shopping) account for 4.7% of respondents in this category, with catalogues taking the largest share with 2.6%. Electrical items also yield similar results with 4.8% using the internet. However the highest volume of respondents using special forms of trading (SfT), such as the internet or catalogues, occurs in responses to the question on personal and luxury goods (such as books, jewellery, china, glass, cosmetics, recording media, and sports equipment) spend. Here 6% of respondents primarily use the internet, with a further 1% using catalogues and 0.3% using TV shopping.

4.12 Of the 64.1% of respondents who stated they undertook DIY shopping in the past six months, 19.7% identified Rugby as their primary destination, compared to 13.7% for Coventry and 6.5% for Daventry. The figure for Rugby is bolstered by an additional 3.4% of respondents who visit Elliots Field Retail Park which contains a Homebase and Wickes DIY. Responses for spend on other comparison items reveals a similar spending pattern with Rugby (including retail parks) accounting for 21.6% of spend for electrical goods, and 20.3% for personal goods.

4.13 Of the respondents, the vast majority (80.6%) use a car to undertake their non food shopping. Of the other respondents 10.8% use a bus/coach, whilst a further 4.9% walk. In terms of other transport options, only 1.2% use the train for non-food shopping, and an even smaller percentage, 0.7% go by bicycle.

Leisure

4.14 It is worth noting that only a small proportion of respondents considered themselves as ‘active users’ of cultural and leisure facilities. In this context therefore the following responses were given:

- Visiting nightclubs - 7.6% of total sample of which 28.9% chose Rugby (although there are no designated “nightclubs” in Rugby, so these are presumed to be venues primarily designated as pubs and bars)
- Use Pubs - 61.8% of total sample of which 32% used pubs in Rugby
- Restaurants – 76.3% of total sample of which 35.6% used restaurants in Rugby

- Bingo – 7.6% of total sample of which 23.7% used Gala Bingo in Rugby
- Cinema – 48.5% of total sample of which 57.5% use Cineworld Rugby
- Bowling – 22.9% of total sample of which 21.4% uses Thornfield Indoor Bowls and 21.0% used the Big Apple (Junction 1)

4.15 Birmingham was the preferred location for cultural activities, (12.1% of total respondents). Rugby was the second choice, accounting for 7.6% of respondents with other locations identified as: Coventry (6.2%), Northampton (4.9%), Leicester (3.0%), Warwick (1.6%) and Leamington Spa (1.5%).

4.16 The most popular location for nightclub visits, restaurants, pubs, bingo and the cinema was Coventry, while Northampton attracted the most respondents visiting bowling facilities outside of Rugby.

4.17 Although 74.7% of those asked did not visit a gym or sports centre, 67.6% of those who did used sport facilities in Rugby and of these 14.2% use the Ken Marriott Leisure Centre.

4.18 When questioned about what factors would influence future use 61.9% said either “nothing in particular”, “don’t know”, or “don’t use leisure facilities”. Following this, financial factors were identified as influencing the decision making process with 9.7% of respondents saying that they would use the facilities more if they were cheaper, and 4.5% if they had more money. Other responses included more “spare time” (5.9%), better children’s activities (1.0%) and better range of activities, more facilities or new facilities (2.6% combined). A new or improved concert/theatre venue and swimming pool were also identified by respondents (0.4% and 0.6% respectively). Finally, transport was identified as being a concern with better public transport (2.1%), easier access (0.9%), less traffic (0.3%), cheaper or free parking (1.4%), and car parking nearby (.7%) all being identified as issues.

Summary Review of Results of Street Survey

4.19 A total of 210 street survey interviews were carried out within Rugby Town Centre on the 30 November and 1 December 2007. Interviews were conducted with Research & Marketing’s Field staff. Respondents were interviewed during the day and early evening between 10:00am – 6:30pm on Friday and Saturday.

4.20 The survey covered a range of aspects relating to shopping habits and in particular sought to establish amongst others, visitor’s reasoning for visiting Rugby and views on their visit.

4.21 A full technical report and copy of the street survey can be found in Appendix 4.

Travel Habits

4.22 Travel to Rugby by car represented the largest percentage of responses from visitors, with 48.6% of respondents travelling either as driver or passenger. Of these travelling by car, the highest proportion used the John Barford Multi-Storey car park (32.4%) on James Street, followed by the Town Hall car park (20.6%) and Clock Towers car park (7.8%). Additionally 33.8% expressed dissatisfaction as the price of town centre car parking.

4.23 Over one quarter of respondents (25.2%) travelled to the centre by bus, whilst 21.4% of respondents walked into the centre. This relatively high figure for walking could be reflective of the compact nature of the town centre and its proximity to surrounding areas of residential development.

4.24 Of the respondents, only 5% stated that they would be linking their trip to the town centre with a visit to other locations such as out of centre retail parks or supermarkets. Only 2 respondents stated that they would be travelling onto alternative shopping areas, whilst the vast majority stated they had arrived straight from home and that they would be returning home following their visit (82.9%). This could indicate that for the majority of those shoppers questioned, Rugby Town Centre contained the relevant shopping/leisure/service provision for their trip, thus eliminating the need to travel onward.

Purpose of Visit

4.25 As could be anticipated, the majority of visitors (57.6%) to Rugby chose non-food shopping as their main reason for visiting the town centre. This was followed by services (banks, hairdressers etc) with 11.4% and convenience shopping with 10%.

4.26 Of particular note is the number of respondents who chose leisure as their primary reason to visit (0.5%). Whilst recreational activities such as window shopping (1.4%) and meeting friends/relatives (8.1%) could be viewed as contributing to the leisure use, the figure appears extremely low in comparison to the 57.6% who visited for non-food shopping. Indeed when questioned as to a secondary reason for visiting the town centre, leisure was only identified by 1 respondent.

4.27 When questioned as to the frequency of visiting Rugby Town Centre for the stated primary purpose, 28.6% of respondents stated they visit on a weekly basis, whilst 15.2% stated they visit on a daily basis. This daily visit figure is of particular note given that only 9% of respondents stated they work in the town centre.

4.28 The most frequent length of a visit by respondents was 1-3 hours (62.9%) with 14.8% spending over this time. During their time within the centre 28.1% of respondents stated they will spend over £50.

Town Centre Feedback

4.29 When asked why they chose Rugby Town Centre for a visit, by far the most cited reasons related to convenience and proximity. Of the total respondents, 48.6% stated proximity of the town centre to their home as the reason for choosing Rugby, whilst a further 20.5% chose 'ease and convenience'. It is interesting to note that the range of shops was infrequently cited (4.3%), as was the ambience/environment (1.4%).

4.30 When asked what they would like to see added to the mix of facilities in the town centre, the most popular response was increased food shopping. Leisure and cultural facilities were also prioritised by 6.7% and 2.4% of people, respectively.

4.31 Feedback was generally positive in many aspects of Rugby Town Centre. In particular the centre performed well when respondents were asked to rate layout, quality & choice of places to eat/drink, security and accessibility. However, there were a number of areas with particularly high levels of poor/very poor responses. Some of the key areas which performed poorly are discussed below.

Choice of Food Shops

4.32 The poorest feedback in the questionnaire related to the choice of food shops in the town. Of the total respondents 34.8% identified the choice as poor with a further 11% stating it is very poor. These results are compatible with the analysis and findings of the health check of Rugby Town Centre undertaken for this study.

Choice of Non-Food Shops

4.33 Whilst not as pronounced as food shopping, 28.5% of respondents labelled the choice of non-food shopping in Rugby Town Centre as either poor or very poor. Interestingly however 12.4% rated the choice as very good, reflecting some polarisation in respondent's views.

Cleanliness and Upkeep

4.34 Of the total respondents, 19.5% labelled the cleanliness of Rugby Town Centre as poor, with 2.9% identifying it as very poor. This is perhaps surprising given that much of the shopping area is covered by a Business Improvement District which controls a service of additional cleaning operations in the area. The highest levels of dissatisfaction were found with respondents interviewed at Market Place and Regent St, whilst High Street was significantly more positive in its results.

Public Facilities

4.35 Just over half of respondents believed public facilities in the town centre, which includes facilities such as bus stops and public toilets, were good or very good. The 27.6% who considered the facilities to be poor or very poor represent a significant indication that facilities such as toilets and bus stops are not well regarded by visitors.

Leisure & Night Time Economy

4.36 When questioned as to their main reason for visiting the town, leisure purposes only accounted for a small percentage of the respondents, with 1.4% of respondents citing recreational reasons, 0.5% leisure and 0.5% visiting a café/pub/restaurant.

4.37 Opinions on the range of leisure and recreation facilities in Rugby were mixed, with "poor" and "very poor" (36.2%), "good" or "very good" (33.3%) and "no opinion" (30.5%) occurring with approximately equal frequency.

4.38 Views on the quality and choice of food and drink establishments was more positive, with 81.9% considering the choice of places to eat and drink either "good" or "very good", and 79.6% considering the quality of the food and drink establishments to be "very good" or "good".

Town Centre Improvements

4.39 When questioned as to what they would like more of in Rugby Town Centre, convenience retailing was the most cited answer with 22.9% of responses, followed closely by non-food retail with 19%. Independent stores, despite their absence in people's reasons for visiting, also emerged in the answers with 14.8% of responses and a further 15.2% when respondents were asked for a second answer.

4.40 Independent stores were also identified when respondents were asked what they thought would make Rugby more attractive for a visit. Here 24.8%, the largest percentage, stated more independent shops as their answer, whilst greater range of stores (18.1%) and more national retailers (10%) also featured regularly.

5. Overview of the Health of Centres

5.1 The Government's key objective for town centres is to promote their vitality and viability. PPS6 identifies the following indicators by which Councils can measure and monitor the vitality, viability and health of their town centres and how they are changing over time:

(i) **diversity of main town centre uses (by number, type and amount of floorspace)**: the amount of space in use for different functions – such as offices; shopping; leisure, cultural and entertainment activities; pubs, cafes and restaurants; and, hotels;

(ii) **the amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations**;

(iii) **the potential capacity for growth or change of centres** in the network: opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development;

(iv) **retailer representation and intentions to change representation:** existence and changes in representation of types of retailer, including street markets, and the demand of retailers wanting to come into the centre, or to change their representation in the centre, or to reduce or close their representation;

(v) **shopping rents:** pattern of movement in Zone A rents within primary shopping areas (i.e. the rental value for the first 6 metres depth of floorspace in retail units from the shop window);

(vi) **proportion of vacant street level property:** vacancies can arise even in the strongest town centres, and this indicator must be used with care. Vacancies in secondary frontages and changes to other uses will also be useful indicators;

(vii) **commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental):** demonstrates the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments. This indicator should be used with care;

(viii) **pedestrian flows (footfall):** a key indicator of the vitality of shopping streets, measured by the numbers and movement of people on the streets, in different parts of the centre at different times of the day and evening, who are available for businesses to attract into shops, restaurants or other facilities;

(ix) **accessibility:** ease and convenience of access by a choice of means of travel, including – the quality, quantity and type of car parking; the frequency and quality of public transport services and the range of customer origins served; and, the quality of provision for pedestrians, cyclists and disabled people and the ease of access from main arrival points to the main attractions;

(x) **customer and residents' views and behaviour:** regular surveys will help authorities in monitoring and evaluating the effectiveness of town centre improvements and in setting further priorities. Interviews in the town centre and at home can be used to establish views of both users and non-users of the centre, including the views of residents living in or close to the centre. This information could also establish the degree of linked trips;

(xi) **perception of safety and occurrence of crime:** should include views and information on safety and security, and where appropriate, information for monitoring the evening and night-time economy; and

(xii) **state of the town centre environmental quality:** should include information on problems (such as air pollution, noise, clutter, litter and graffiti) and positive factors (such as trees, landscaping and open spaces).

5.2 The principal information sources that we have used are as follows.

(i) Drivers Jonas field surveys undertaken in December 2007;

(ii) Rugby Borough Council information on existing floorspace, relevant commitments and relevant emerging development proposals;

(iii) Experian Goad information on floorspace, retailer representation and vacancies (November 2007);

(iv) Published databases on retailer representation and demand - Egi, Focus, IGD, and Promis;

(v) Local estate agents for local market information;

(vi) Valuation Office for information on rents and yields;

5.3 For the purposes of comparison with the performance of Rugby as a strategic centre identified within the adopted and emerging RSS, this study has also drawn on material from the West Midlands Regional Spatial Strategy – Regional Centres Study, Roger Tym and Partners, March 2006 and updated in November 2007.

Rugby Town Centre

5.4 Within this section reference is made to data sources such as Experian GOAD (September 2006) and VenueScore (formerly Management Horizons) (2005). Where possible this study has used the most up to date data available.

Overview of the Centre

5.5 Rugby is the major retail centre in the Borough. The primary retail area within Rugby Town Centre is centred around the mainly pedestrianised areas of Market Place, High Street and Sheep Street. The only covered shopping centre in the town centre is the Clock Towers Shopping Centre, located off Market Place and North Street.

5.6 The shopping area within Rugby is mainly accommodated in ground floor units, thus providing accessible retail facilities. The town centre is also well served by a number of modes of transport, including cycling, on foot, bus and train (although the railway station is approximately 10 minutes walk from the centre).

5.7 According to a March 2008 Promis report, Rugby Town Centre faces 'below average competition' from competing retail centres. The report states that Rugby ranks 97 out of the 200 PROMIS centres on the PMA Competition Indicator (a rank closest to 1 indicates a low level of competition).

The Quantity and Quality of Retailing

5.8 Rugby accommodates a range of retail facilities that are discussed in detail below. In addition to retailing, the centre also hosts a wide range of non-retail facilities and activities including tourist attractions such as Rugby Football Museum.

5.9 Within the designated Central Shopping and Commercial Areas boundary, there is a mix of retail facilities which is summarised in the table below: -

Sector	No. of Units	% of Units	National Average %
Convenience	18	5	9.2
Comparison	155	47	45.5
Service	120	36	33.2
Other	8	2	1.3
Vacant	29	9	10.8
Total	330	100	100

Source/notes:
(1) The categories are based on the classification provided by GOAD, relate to ground floor uses only and are based on the GOAD analysis of September 2006, updated by Drivers Jonas site visits in December 2007. Data on UK averages has been provided by GOAD (October 2007).
(2) Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services, building societies, estate agents and valuers. Taxi ranks are also included in the service category, although this use is not categorised by GOAD.
(3) Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis, therefore for the purpose of comparison, these have been excluded from our analysis.
(4) 'Other' category includes employment agencies, tourism offices and main and sub-post offices.

5.10 This table demonstrates that comparison retailing is the most dominant concentration of uses within Rugby at 47%, a figure slightly above national average. Service uses comprise 36% of the total units within the centre, which is above the national average of 33.2%. Whilst convenience units are 4% lower than the national average, in general the use breakdown is broadly consistent with the national averages.

5.11 Away from the pedestrianised area surrounding Market Place, independent retail units are also prevalent within the town centre niche shopping streets offering a broader range of specialist items largely unavailable in the Primary Shopping Area. Of particular note is the 'independent quarter' formed by streets north of Church Street. Regent Street, Bank Street, Henry Street and Albert Streets have noticeable concentrations of independent retailers with a diverse retail offer. Whilst this area is perhaps the most noticeable concentration of independent retailing, the Churchside Arcade, located on Little Church Street, behind the Market Place is also a noteworthy shopping destination. The Arcade contains seven small niche units including Thank Heaven Babywear, Our White Room Gallery and Terracotta Studio Fashion. There is currently only one vacancy in this arcade.

5.12 Within Rugby, there are also a number of other 'town centre activities' which are used after shopping hours for activities such as eating and drinking. Although restaurants and cafes are widely dispersed through the centre, there is a marked concentration of those establishments along Gas Street/Castle Street, a pedestrianised throughfare connecting Church Street to Albert Street via the John Barford multi-storey car park. Occupiers on the street include national chains such as JD Wetherspoons and alongside local independent offerings. There are however prominent vacancies in this area, including the 280 sq.m. former Monastery Rooms Bar which fronts a small pedestrianised square.

5.13 There is also a concentration of restaurant and evening uses at the other end of the Town Centre core around the southern ends of High Street and Sheep Street including late bars such as Bar Sport and Walkabout, together with a mix of other independent pubs, cafes, and reasonable quality restaurants.

5.14 Overall, whilst there is a large number of service units, there is generally a good spread of uses throughout the centre which contributes to a varied street scene and encourages footfall around the centre. Amongst the most dispersed service uses are hair and beauty centres which can be found on most streets within the centre. There is however a marked concentration of such uses in the triangle of land formed by Castle Street, Gas Street and Church Street. In this small area there are six hairdressing units.

5.15 Overall given the diversity of leisure and service uses and the spread around the centre, the variety of out-of-hours activities within the centre is generally good.

Representation by retailers and other commercial operators

5.16 There are a number of national multiple retailers located within Rugby, including Marks & Spencer, W H Smiths and Woolworths. According to the Focus Town Centre Report, Rugby includes 55% of the top 20 retailers in their classification, although major department store operators such as Debenhams, John Lewis and BHS are presently absent from the centre. There are also a large number of smaller independent traders present within Rugby which contributes to the diversity of the retail offer.

5.17 Although most of Rugby's retail provision is located along the street pattern, there is one major shopping centre within the retail core. The Clock Towers Shopping Centre was opened in 1980 and prior to the Co-op/ASDA redevelopment (see below) accommodated 23,226 sq.m. (net) of Class A1 retail uses in 45 units, and also accommodated 550 car parking spaces. The Clock Towers Shopping Centre is currently occupied by a variety of national retailers including a large Wilkinsons outlet (1,500 sq.m. gross) as well as some smaller independent units such as Xplicit Ladies and Menswear (150 sq.m. gross).

5.18 A large area of the shopping centre is currently in the process of being redeveloped as part of the Chapel Street Redevelopment Area. The former Co-op Homemaker department store (previously approximately 2,980 sq.m. gross) is scheduled to be demolished along with three neighbouring vacant units and Madison's public house. The redeveloped site will include a 8,175 sq.m. ASDA supermarket with 440 car parking spaces and 3,715 sq.m. of unrestricted retail units.

5.19 In addition to the redevelopment area, there are currently four vacant units in the centre, the largest of which is the former Kwik Save supermarket (1,440 sq.m. gross).

5.20 The closure of the Co-op store, which included circa 550 sq.m. gross of convenience retailing, and the Kwik Save store have led to an under provision of convenience retailing in the Town Centre. The largest convenience store is the Netto supermarket (1,160 sq.m. gross) which is located to the rear of the Clock Towers Shopping Centre. This is still within the designated Town Centre Boundary although isolated from the shopping area by the heavily trafficked Corporation Street. There is also an Iceland store (600 sq.m. gross) within the Clock Towers Shopping Centre.

5.21 The other notable supermarkets within the Town Centre are Sainsburys Local (730 sq.m. gross) and Spar (200 sq.m. gross), although both of these are located on Clifton Road on the fringes of the shopping area. Whilst Marks & Spencer has a convenience retailing element within its store (circa 200 sq.m. net), the remaining convenience floorspace is provided by small bakeries, butchers, greengrocers and off licenses.

5.22 Whilst the level of convenience floorspace in Rugby, at 5% of total units, seems noticeably low, the Chapel Street Redevelopment Area will bring an additional 8,175 sq.m. of convenience floorspace in the form of an Asda supermarket.

5.23 In addition to the multiple retailers, the Town Centre has a good provision of independent/specialist retailers. Streets such as Regent Street and Bank Street contain a variety of independent retailers, whilst Churchside Arcade provides a small indoor centre housing stores and galleries. Such independent units provide a more bespoke range of services than the national multiples elsewhere in the centre.

5.24 As expected with a town of the size of Rugby, there is also a noticeable presence of financial and property services within the Town Centre. A main concentration of such services is found on the northern end of Regent Street and Albert Street. This area is dominated by estate agents, solicitors and legal/professional services.

5.25 Using the independent Venuescore retail rankings (2005) it is possible to compare Rugby to neighbouring and competing centres. The Venuescore rankings are based on the total number of national non-food or comparison retail multiples located in a centre, and it provides a basis for analysing the critical mass and marketing position of the top 2,000 + retail destinations in the United Kingdom. Centres are ranked based on the number and quality of multiple retailers present, and includes town centres, stand-alone shopping centres, retail parks, and factory outlet parks.

5.26 The Venuescore (2005) table below summarises the sub-regional and district retail hierarchy and places Rugby within this: -

Centre	Venuescore Ranking	Venuescore Classification
Birmingham	2	Major City
Coventry	41	Major Regional
Northampton	49	Regional
Leamington Spa	101	Regional
Nuneaton	118	Regional
Rugby	190	Sub-regional
Hinckley	214	Sub-regional
Daventry	557	District
Lutterworth	1,838	Local

Source/ Notes:
(1) Venuescore Retail Rankings (2005).
(2) This classifications reflect eight grades of retail centres in the United Kingdom: Major City, Major Regional, Regional, Sub-regional, Major District, District, Minor District, and Local.

5.27 The table shows that Rugby is classified as a Sub-regional Centre, and is ranked accordingly. Venuescore ranks Rugby at 190. Coventry and Northampton, which Rugby geographically lies between, are both ranked in the 40s. Within the catchment, Rugby is by far the best performing centre in the rankings, 367 places ahead of Daventry. The ranking of Lutterworth at 1,838 further demonstrates the importance of Rugby as the primary centre in the catchment area.

Demand for Representation by Retailers and Other Commercial Operators

5.28 Based on information obtained from the PROMISlive Rugby Retail Report in October 2007, there were 5 reported requirements for Rugby, against an average of 27. This indicated that Rugby had a relatively low level of demand for a town of its size and status. The Focus requirements database reveals that one of the largest retail requirements in Rugby is a 1,111 sq.m. to 1,858 sq.m. requirement by Debenhams Retail PLC.

Shopping rents and yields and historic trends

5.29 Information regarding shopping centre yields has been obtained from the Valuation Office Shopping Centre Yields July 2007 report.

5.30 The table below sets out the reported yields for the centre in the period from April 2002 to July 2007.

Date	04/02	10/02	04/03	01/04	07/04	01/05	07/05	01/06	07/06	01/07	07/07
Rugby	6.5	6.5	6.5	6.5	6.5	6.5	6.5	6.5	6.5	6.25	6

5.31 The rental yields within the centre have decreased over the course of the past year from 6.5% to 6%. Over the period 2001 - 2005 the yields in Rugby remained stable which is an indication of the strength of the centre. These low yields suggest that Rugby is considered to have strong potential for future growth and are likely to be perceived favourably by investors. The recent 0.25% fall in yields is a further indication of the strength of Rugby within the retail hierarchy.

5.32 The yield profile for Rugby is broadly typical for a shopping centre occupying a sub-regional position in the hierarchy of centres, although the recent slight fall in yields may reflect a growing feeling of investor confidence in the strength of the town centre.

5.33 The Rugby PROMIS Report stated that at mid 2007, agent sources estimated prime rents in Rugby at £90 psf Zone A. This represents no change on the end 2006 level of prime rents in the town.

Primary and secondary retail frontages

5.34 The adopted Rugby Local Plan Proposals Map shows the Primary Shopping Area within Rugby. The Primary Shopping Area is identified as a swathe of land incorporating Sheep Street, High Street, Clock Towers Shopping Centre and the corner of Church Street and North Street.

5.35 Street RankingsTM identifies multiples located in shopping streets and allocates an attraction value based on sales density and average selling area. Using these values, streets within a centre are ranked. The Street RankingsTM top three streets within Rugby are The Clock Towers Shopping Centre, High Street and Market Place.

5.36 The existing primary shopping frontage predominantly contains retail floorspace with few vacant outlets interspersed along the frontage. Aside from the vacancies in the shopping centre discussed below, the most prominent vacant unit is the former Bagel Bite unit. Although only 40 sq.m. (gross), the unit occupies a strategic location at the junction of Sheep Street, High Street and Market Place.

5.37 The 2006 adopted Local Plan states that it is considered that the defined shopping and town centres of Rugby are large enough to accommodate a more flexible range of retail and other town centre uses, without the need to define a secondary frontage.

Vacant street level property

5.38 Town centres are constantly evolving and vacant units provide opportunities for retailers to locate in such centres and add to the diversity of retailer representation. Vacant units are therefore not necessarily a sign of stagnation or weakness, they are a function of the economic cycle within all retail centres.

5.39 A site visit by Drivers Jonas in December 2007, confirmed that the number of vacant units within Rugby was 29 units. The size of vacant units varies dramatically around the centre, and ranges from 1,440 sq.m. (former Kwik Save store) to around 30 sq.m. (Churchside Arcade store).

5.40 It should be noted that the vacancy figures provided in this analysis do not include the five vacant units of the Clock Towers Shopping Centre which are awaiting demolition as part of the Chapel Street Redevelopment Area.

5.41 The vacancy rate accounts for 9% of the total number of units within the centre and is below the national average of 10.8%, a useful indication of the health of the centre.

5.42 Since the GOAD survey of September 2006 it is interesting to note that there have been key uptakes and new vacancies. In terms of new vacancies, a number of these including Dr & Herbs and Kwik Save reflect national store closures. Of the units which have been let since the original GOAD survey, two of these are prominent units which are now occupied by bar/restaurants. Of particular note is the reopening of 12 Bank Street as Bank Bar & Restaurant.

Pedestrian flows

5.43 The site visit undertaken by Drivers Jonas during December 2007 revealed that Market Place was the most noticeably busy area for pedestrian footfall. This is perhaps unsurprising given the concentration of retail units and shopper facilities in the area. In general, the number of pedestrians decreased with distance from Market Place, however there were some notable concentrations as well as quiet areas in key areas within the town.

5.44 Aside from Market Place there were notable pedestrian concentrations on Church Street, which connects Regent Street and Market Place. Footfall was also relatively high through the Clock Towers Shopping Centre. The streets which form the independent shopping area within Rugby benefit from having a steady level of pedestrian flow, although the volume of this flow during the site visit was significantly lower than in the core retail area at Market Place.

5.45 Despite the proximity to Market Place, there was a marked difference in pedestrian flow between the northern and southern ends of High Street and Sheep Street. The number of pedestrians in the southern end of the streets was lower than might be expected, although it is important to recognise that this area contains a number of bars/restaurants, and that pedestrian flow outside of shopping hours would differ.

5.46 It was the fringe locations such as the junction of Regent Place and Regent Street that were noticeably low in footfall terms. Additionally, the streets which connect the town centre to the railway station also had low pedestrian flows, with Railway Terrace showing surprisingly low levels of pedestrian activity given the proximity and direct route to the Railway Station.

Accessibility

5.47 Rugby is very well served by public and private transport. In particular the town benefits from excellent connections with junction 1 of the M6 approximately two miles north of the town centre, junction 1 of the M45 approximately two miles to the south and junction 18 of the M1 around three miles to the east.

5.48 Rugby railway station is located on the West Coast Mainline and is well served by frequent national, regional and local services including regular services to London Euston with a journey time of one hour. The railway station itself is currently being upgraded, however it lies some 465m from the Town Centre boundary and 850m from the Town Centre Shopping Area boundary. The route from the railway station to the shopping area is not particularly legible and currently does not link well. However, the redevelopment of the Livestock Market could help to address this through the creation of a landscaped street between Railway Terrace and the station entrance.

5.49 The Council currently operate eight car parks within the town centre including the 370 space John Barford multi-storey on James Street. In addition there are a number of private car parks including a large facility at the Clock Towers Shopping Centre. Parking prices are around £1 for up to three hours in Council run facilities.

5.50 A key issue in the centre is a perceived car parking shortage which has been reported in the media. Forecasts have predicted that by 2011 there will be a chronic shortage of spaces in the town centre. Although the new ASDA redevelopment at Chapel Street will include up to 440 car parking spaces when it opens in March 2009, this is perceived locally to be insufficient.

5.51 Provision for cyclists is fair in Rugby with cycle racks provided in key areas of the town. There are however no dedicated cycle routes through the core of the town centre and the routes which do run through the centre are on the fringe.

Perception of safety and occurrence of crime

5.52 Rugby Town Centre is covered by a Business Improvement District (BID) and the BID team now run the Town Centre CCTV system, in partnership with the Police and local traders. The system includes fifteen pan-tilt and zoom cameras located in the town centre as well as three pan-tilt and zoom and twelve static cameras located in the John Barford multi-storey car park in James Street. Camera images are transmitted to a CCTV control room where they are monitored 24 hours per day 365 days per year. In addition there is an active 'Shopnet' group for retailers and a 'Pubnet' group for town centre pubs and clubs.

5.53 There is extensive CCTV coverage in Rugby Town Centre. However this does not appear intrusive to users of the centre and is often discreetly positioned.

5.54 In addition to the CCTV coverage, Rugby BID also operates teams who are responsible for maintaining and improving the environmental quality of the centre. As witnessed frequently during Drivers Jonas site visits, the BID includes a small team of dedicated cleaners and well as the Rugby Rangers Scheme. The Rangers undertake street patrols six days a week and provide a visible presence on the street and a ‘friendly face’ for the town centre.

Centre environmental quality

5.55 Much of Rugby’s Central Shopping Area, with the exception of the northern half of Clock Towers Shopping Centre, falls within a Conservation Area. This has helped maintain the centre as an attractive destination with a variety of architecturally interesting buildings.

5.56 The centre benefits from the pedestrianisation of some of the key commercial streets, most noticeably the confluence of High Street, Sheep Street and Market Place. Rugby’s historic buildings add to the environmental quality with buildings from a range of eras providing a varied visual landscape.

5.57 Although there is provision of reasonable quality street furniture and theming around Market Place, the main shopping areas of Rugby lack a defined public square. There are a number of sites within the Town Centre boundary which could be considered public open space, however many of these, such as the large paved area adjacent to the John Barford car park are not clearly defined and are not well used.

5.58 The shopping areas are largely screened from the most heavily trafficked roads in the centre and for the most part provide a relaxing and comfortable shopping environment. There are however notable areas which suffer from poor environmental quality, such as North Street where traffic creates a conflict with the pedestrian environment, combined with a poor visual environment.

5.59 However, in general the provision of street furniture, planting and trees enhance the physical environment and attractiveness of Rugby Town Centre.

5.60 The quality of pedestrian entrances to the Town Centre is varied. For visitors arriving into the town from the train station, the route into the centre is poorly defined. Signposting to the Town Centre is poor with few signs immediately noticeable and little indication as to which direction along the road a visitor needs to head. Indeed, once in the right direction, the predominantly residential nature of surrounding streets gives little indication of the approach to the centre.

5.61 Visitors arriving by car to one of the many town centre parking facilities are given a much clearer understanding of their location as compared to rail users. There are a number of information boards and signposts located at strategic points close to parking facilities.

5.62 Rugby hosts a number of town centre based events and festivals throughout the year, many of which are promoted to emphasise the town's historic built environment. Events held in Rugby include the Victorian Christmas Market and the Caribbean Carnival.

Hospitality, Leisure & Cultural Provision

5.63 As part of this overview of the health of Rugby Town Centre, a detailed leisure supply review was also undertaken during late 2007. A full report, including detailed maps and tabulations of facilities both within and beyond the town centre, is provided at Appendix 5. A summary of the key findings is provided below.

Accommodation

5.64 Serviced accommodation within the Town Centre is extremely limited across all levels, both in terms of the quality of provision and number of rooms available. Within the defined Town Centre boundary there are seven hotels/guest houses, none of which include more than 35 rooms. Of the seven hotels/guest houses, none are rated four or five stars, with only two (The Carlton and The Woodville) rated three star.

5.65 Planning permission was granted in 2006 for the development of a 111 bedroom Ramada Encore hotel on land close to Railway Terrace, Gas Street and Church Street in the Town Centre. The hotel will also have a 200-seat conference suite as well as a bar and restaurant. The development of this site will mean that a national hotel operator will be present in Rugby Town Centre, which is considered to represent a significant benefit for attracting additional branded hotel operators in the future.

Food and Beverage

5.66 There is a range of food and beverage establishments in the town centre encompassing traditional English fare such as the Merchant Inn and the Carlton Hotel, ethnic venues such as the River Avon and La Casa Loco, franchise fast food/coffee shop operators such as McDonald's, Costa Coffee, as well as numerous independent sandwich and take-away units.

5.67 Rugby has a very large number of pubs per square mile ranging from the historic, coaching house pub e.g. the Three Horseshoes Hotel established in 1728, to the branded modern day offer e.g. the Rupert Brookes Wetherspoons pub.

Cultural and Gaming Facilities

5.68 Rugby has a range of museums and arts related venues including the world renowned Webb Ellis Rugby Football Museum and the Rugby Art Gallery and Museum which opened in 2000. Although just outside the designated Town Centre boundary, the Rugby School, as well as serving as a major tourist attraction for the town as the birthplace of Rugby Football, contains an art gallery with changing exhibitions, a school museum, and a sports centre which includes: fitness centre; swimming pool; tennis courts; polo fields; rugby pitches; all-weather courts; and conference facilities.

5.69 Rugby Town Centre's gaming 'offer' includes facilities for billiards and snooker (Rugby Billiard Club and Riley's American Pool & Snooker), as well as bingo and amusements.

Summary

5.70 Rugby Town Centre is a healthy and attractive centre which plays an important role as a sub-regional centre. The Town Centre provides a good range of comparison and convenience retailing with a good mix of national multiple retailers and in particular a range of independent stores. This provision is backed by a wide range of other town centre uses which reflect Rugby's role as a tourist destination for the-sub-region.

5.71 However, there is a mixed picture in terms of branded presence in the Town Centre. Whilst food and beverage, cinema and gaming include national operators, there is a limited presence of such operators in the health and fitness sector for instance, with the main branded provision (e.g. LA Fitness/Virgin) located on the edge of town. The Town Centre would benefit from more overt structuring into 'quarters' and strengthened links between leisure and retail and the promotion of an evening economy which extends to more than drinking and eating out.

5.72 There remain elements of the Town Centre and its immediate vicinity that could be enhanced and some of the entrances into the Town Centre are limited in terms of legibility and attractiveness to pedestrians. Overall, Rugby is a vital and viable town centre, with notable strengths in terms of the presence of a mix of uses and activities, as well as the presence of a range of independent units. However, there are also opportunities for further enhancement and growth to protect future vitality and viability as reviewed in the later sections of this Study report.

Analysis of Other Local Retail Facilities and Nearby Centres

5.73 The following section of this Study report provides a summary analysis of the level and range of other retail facilities located within the Rugby area, particularly including existing retail parks and other stand-alone retail facilities outside of the Town Centre. In addition, this section provides a brief description and review of other nearby Town and District Centres within the wider Sub-region.

5.74 The purpose of the following analysis is to inform and provide context to the appraisal of shopping patterns and markets shares used as the basis for the assessment of retail expenditure capacity (convenience and comparison goods) and conclusions on the need for additional retail floorspace within Rugby as identified by this Study.

5.75 In general terms, Rugby Town Centre and the levels of overall expenditure retention within the identified Rugby catchment area are affected by the presence of a number of larger town centres in the wider sub-region (including Coventry and Leamington Spa). Whilst areas of the catchment which are geographically closer to neighbouring centres see higher levels of competition, Rugby Town Centre does benefit from having relatively limited competition from any major centres in the immediate surrounding area. As such the Town Centre has a relatively dominant position for a range of comparison shopping needs. The following analysis also shows that the range of shopping offer and available facilities in Rugby is supplemented by the presence of large scale out-of-centre retail parks, particularly to the north of the Town Centre which have been developed over time since the late 1980s.

Rugby Retail Parks & Standalone Stores

Elliots Field Retail Park

5.76 Elliots Field Retail Park is located approximately 1.3 miles from Rugby Town Centre, close to Junction One Retail and Leisure Park and a large Tesco supermarket. The Park is accessed off the A456 Leicester Road which is one of the main entrance routes into Rugby.

5.77 The retail park opened in 1987 and originally featured 11,148 sq.m. (net) of open A1 floorspace. The park was expanded in 1998 to include an additional 929 sq.m. (net) bringing total net floorspace in the park to 12,077 sq.m. (net) across 10 units. Utilising the open A1 planning permission, one unit of 1,394 sq.m. was subdivided in March 2006 to create two 697 sq.m. units with mezzanines.

5.78 The current occupiers of the park are:

- Next (657 sq.m.)
- Wickes (3,500 sq.m. gross)
- Halfords (678 sq.m.)
- Homebase (2,815 sq.m.)
- Pets at Home (734 sq.m.)
- Allied Carpets (1,224 sq.m.)
- Pizza Hut
- TX Maxx (1,224 sq.m.)
- Brantano (1,224 sq.m.)
- Comet (488 sq.m.)
- Carpetright (1,000 sq.m. gross)

Junction One Retail Park

5.79 This retail park is located circa 1.3 miles from Elliots Field Retail Park off the busy Leicester Road which connects to Rugby Town Centre and Junction One of the M6. The site currently contains three leisure units and ten retail units alongside 875 car parking spaces.

5.80 The 21 acre retail and leisure development received outline planning permission for mixed-use development in January 1999. Construction on the first phase of the development, the retail element including units for Boots, Curry's and Powerhouse, opened in October 2000 followed later by the leisure element. This initial phase of development comprised 7,897 sq.m. (net) of open A1 retail and 8,919 sq.m. (net) of Assembly & Leisure (D2). An extension to the park was granted planning permission in March 2003 for further non-food retail development of circa 929 sq.m. (net) in three units. The retail park currently comprises a total of 16,097 sq.m.

5.81 The current occupiers of the park are:

- Laura Ashley Home (381 sq.m.)
- Carphone Warehouse (180 sq.m.)
- Dreams (373 sq.m.)
- Currys (1,425 sq.m.)

- AHF Home Furnishings (2,265 sq.m.)
- JJB Sports (940 sq.m.)
- Boots (951 sq.m.)
- Virgin Active (3,627 sq.m.)
- Big Apple Bowling (2,230 sq.m.)
- Cineworld (2,877 sq.m.)
- McDonalds (279 sq.m.)
- KFC (236 sq.m.)
- Frankie & Benny's (333 sq.m.)

Central Park/Coton Grange

5.82 This mixed-use park is located circa 2.6 miles north of Rugby Town Centre. The Central Park District Centre is located on the A426 which connects to Junction 1 of the M6. The District Centre site forms part of a larger mixed-use development area that includes 900 new homes and circa 93,000 sq.m. of new business space. The District Centre scheme, which is complete but not yet completely fitted out, comprises 24 apartments and circa 780 sq.m. of retail units.

5.83 In addition there are two standalone units on the site, one of which is currently being subdivided into restaurants. The largest single unit on site, circa 1000 sq.m. (net) is let to Aldi and contains 6 tills. The store was completed in June 2007.

Tesco, Leicester Road

5.84 This Tesco store is located on Leicester Road, in close proximity to both Elliots Field and Junction One retail parks. The store, which opened in 1988, has a gross area of circa 6,375 sq.m. (4,562 sq.m. sales) with 23 checkouts and 600 car parking spaces. In addition to its convenience retail provision, the store also contains a pharmacy, photo processing laboratory, café and clothing and entertainment sections. The store is open 24 hours Monday-Friday.

Sainsburys, Dunchurch Road

5.85 The Sainsburys Store on Dunchurch Road opened in 1989 and is the largest supermarket in Rugby. The store has a gross area of circa 7,840 sq.m, of which circa 4,785 sq.m. is the sales area, with 30 checkouts and 650 car parking spaces. In addition to its convenience retailing provision, the site also contains a petrol station, restaurant, dry cleaners, film processing laboratory and key cutting.

Aldi, Paddox Close

5.86 This Aldi store is located on Paddox Close off the A428 Hillmorton Road, approximately 1.5km south east of the town centre. The store opened in November 1997 and has a gross area of circa 1,022 sq.m. of which the sales area is circa 706 sq.m. There are four checkouts in the store and 101 car parking spaces.

Lidl, Bilton Road

5.87 The original permission for the foodstore dates from 1994 with a renewal in 1998. The store was completed in late 2000. The site itself is approximately 1 kilometre from the centre of Rugby alongside the Bilton

Road. The store comprises 871 sq.m. of sales area and 94 off street parking spaces. A planning application was received in 2006 that proposed an extension to the store to provide a new warehouse area on the north western side of the building thereby releasing a large area of existing storage within the building to become shop floor area resulting in 199m^2 of additional sale space. It is understood that this application was withdrawn by the applicant in January 2007 after being recommended refusal in the Officer's Report to Planning Committee.

Other Nearby Centres

Daventry

5.88 Daventry is located approximately 11 miles south east of Rugby. The town benefits from good communications, with the A45 passing through the town and providing a direct connection to Junction 16 of the M1. The town is also easily accessible by all public and private transport with good bus and road links to the rest of the country. Daventry's principal competitor is Northampton town centre; around 20 minutes drive (12 miles) to the east.

5.89 The Venuescore Rankings (2005) table below compares the position of Daventry against some of the other centres detailed in this report: -

Centre	Venuescore Ranking	Venuescore Classification
Northampton	49	Regional
Leamington Spa	101	Regional
Nuneaton	118	Regional
Rugby	190	Sub-regional
Hinckley	214	Sub-regional
Daventry	557	District
Lutterworth	1,838	Local

Source/ Notes:
1) *Venuescore Retail Rankings (2005).*
2) *This classifications reflect eight grades of retail centres in the United Kingdom: Major City, Major Regional, Regional, Sub-regional, Major District, District, Minor District, and Local.*

5.90 A Venuescore rank of 557 reflects the small size of the centre and its retail provision. The ranking of Daventry 508 places below Northampton and 367 places below Rugby illustrate the level of competition faced by the centre.

5.91 According to the Focus Town Centre Report (January 2008), 25% of top 20 retailers are present in the town centre, including Boots, Argos and Superdrug.

5.92 The convenience retail provision in Daventry is good, with three major supermarkets in close proximity to the primary shopping area. The largest of these is Tesco (3,990 sq.m. gross). In addition, there is a Waitrose store (2,370 sq.m. gross) which forms part of the Bowen Square Shopping Centre and a 1,550 sq.m. (gross) Aldi supermarket. This provision is supplemented by a variety of smaller convenience units such as Cool Trader Frozen Foods, as well as a selection of independent local butchers and bakeries.

5.93 Whilst Daventry does contain areas of historic buildings and good quality environments, much of the shopping areas appear dated, whilst the urban environment can be poor in sections. This is particularly true around New Street where a main road separated the Tesco and Waitrose stores. Large amounts of surface car parking and exposed service areas also reduce the centre's environmental quality.

Coventry

5.94 Coventry is a major commercial city located approximately 12 miles west of Rugby. The city is at the hub of the national motorway network and is easily accessible by all forms of public and private transport.

5.95 The Venuescore Rankings (2005) table below compares the position of Coventry against some of the other centres detailed in this report: -

Centre	Venuescore Ranking	Venuescore Classification
Coventry	41	Major Regional
Northampton	49	Regional
Leamington Spa	101	Regional
Nuneaton	118	Regional
Rugby	190	Sub-regional
Hinckley	214	Sub-regional
Daventry	557	District
Lutterworth	1,838	Local

Source/ Notes:

3) *Venuescore Retail Rankings (2005).*
4) *This classifications reflect eight grades of retail centres in the United Kingdom: Major City, Major Regional, Regional, Sub-regional, Major District, District, Minor District, and Local.*

5.96 A Venuescore rank of 41 reflects the importance of the centre and its retail provision. The fact that Rugby is ranked 149 places below Coventry further demonstrates the level of competition between the centres.

5.97 A March 2008 PromisLive report estimated there is approximately 124,000 sq.m. of retail floorspace in Coventry City Centre. Of this provision, the city offers a reasonable range of mass-market multiples and high street retailers. According to the Focus Town Centre Report (January 2008), 85% of top 20 retailers are present in the town centre, including Debenhams and Next.

5.98 Around 37% of the retail floorspace is managed, with four large shopping centres in the core. The largest of these is the West Orchards Centre which is anchored by Debenhams and Marks & Spencer.

5.99 Convenience retail provision in the retail core is limited to a Sainsburys, Marks and Spencer foodhall and an Iceland food store. A large Co-op Extra superstore closed in January 2006 and has now been replaced by the 23,500 sq.m. IKEA store. This store, which opened in December 2007, is the world's first city centre IKEA.

5.100 Although still renowned for it's medieval history, Coventry's built environment suffered greatly from bombings during World War II as well as wholesale redevelopment projects in the 1960s. Projects such as the inner ring road became synonymous with the city. Although many of these redevelopments are viewed as aesthetically unattractive, it should be noted that the retail core is almost entirely pedestrianised, shopper friendly environment. The ongoing regeneration of the City Centre is largely focussed on improving this situation, and recent redevelopment projects have created high quality urban areas.

5.101 Recently is was announced that Coventry City Council is considering plans to double the amount of retail floorspace in the city centre by linking the four shopping centres.

5.102 Coventry also contains a significant amount of retail warehousing outside the City Centre. According to the March 2008, PromisLive report, this was estimated at circa 132,000 sq.m., with most goods categories over-represented in terms of provision per household (with the exception of bulky goods). 43% of this floorspace is located on retail parks, of which there are five in and around Coventry.

5.103 Additionally there are two significant leisure parks in the Coventry area. On the edge of the city is Skydome, which incorporates a cinema, nightclub and range of bars/restaurants. Four miles north east of the city is Crosspoint which offers a similar selection of leisure operators.

Leamington Spa

5.104 Leamington Spa is the largest town in the District of Warwick and is a renowned historic centre. The town lies approximately 15 miles south west of Rugby and 11 miles from Coventry. The M40 skirts the western fringe of the Leamington Spa area, providing excellent communications links with the West Midlands and the South East.

5.105 The Venuescore Rankings (2005) table below compares the position of Leamington Spa against some of the other centres detailed in this report: -

Centre	Venuescore Ranking	Venuescore Classification
Coventry	41	Major Regional
Northampton	49	Regional
Leamington Spa	101	Regional
Nuneaton	118	Regional
Rugby	190	Sub-regional
Hinckley	214	Sub-regional
Daventry	557	District
Lutterworth	1,838	Local

Source/ Notes:
5) Venuescore Retail Rankings (2005).
6) This classifications reflect eight grades of retail centres in the United Kingdom: Major City, Major Regional, Regional, Sub-regional, Major District, District, Minor District, and Local.

5.106 A Venuescore rank of 101 reflects the regional importance of the Leamington Spa centre and its retail provision and is 52 places higher in the rankings than Rugby.

5.107 Leamington Spa Town Centre is renowned as an attractive, historic Regency centre, with a core retail area that comprises a number of wide (non-pedestrianised) streets. As with many other historic towns, many shop units in Leamington are generally unsuited to the requirements of modern retailers. Regardless however, according to a March 2008 PromisLive Report, there is an estimated 108,000 sq.m. of retail floorspace within the town centre. Of this floorspace, only circa 15% is managed floorspace, with only three notable shopping centres, the largest of which is the Royal Priors.

5.108 Although the town does have a House of Fraser, the department and variety store provision is generally relatively limited. However, the town does have a range of national multiples including key mid market fashion retailers, the volume of which is noted by PromisLive as being reasonable for a town of Leamington Spa's size. The same report also states that Leamington Spa has a significantly above average volume and quality of retail provision relative to the size and affluence of the shopping population, which can be seen as reflective of the importance of tourist and visitor spending to the town.

5.109 The convenience retail provision in the Town Centre is limited, with Tesco Metro and Marks & Spencer food hall the only major convenience retailers in the prime shopping area. This is supplemented by an Iceland store, beyond this area.

6. Assessment of Retail Need

6.1 This section of the Study report describes the steps that have been taken to prepare estimates of supportable additional comparison and convenience floorspace within Rugby Town Centre and the wider Borough up to 2026.

6.2 The retail tables used to inform the forecasts and conclusions for comparison and convenience floorspace capacity are set out in Appendices 6 and 7 respectively.

6.3 Within the assessment for comparison retail capacity, the section also provides an assessment of potential capacity for new bulky goods comparison retail floorspace.

Survey Area

6.4 The survey area for the assessment of available retail capacity is based on the area used for previous retail studies for the Borough. The area was agreed with the Council prior to commissioning the household shopping survey (the survey).

6.5 The survey was carried out by Research & Marketing in December 2007. The survey area has been divided into fourteen zones for the purposes of analysis. The survey area is defined in Appendix 3.

Population Estimates and Forecasts

6.6 Population estimates and forecasts for the period 2006-2026 have been provided by Experian and are set out in Table 1 of Appendices 6 and 7. The Experian Summary Demographics reports are based on the defined zones within the survey area. The use of Experian population estimates has been agreed with the Council.

Expenditure per Head Estimates and Forecasts

6.7 Average expenditure per head estimates for each of the fourteen zones in the survey area have been provided by Experian for 2006 and are set out in Tables 2 and 3 of Appendix 6 and Table 2 of Appendix 7.

6.8 Comparison expenditure per head estimates for the period 2008-2026 have been derived by growing the 2006 estimates by a rate of +5.0%pa. This is the mid point between Experian's current recommended long and ultra-long growth rate for comparison goods expenditure as set out in the latest Experian Retail Planning Briefing Note (Note 5.1, November 2007). The 2006 expenditure per head figures for bulky comparison goods have been grown at a rate of +3.5%.

6.9 Convenience expenditure per head estimates for 2008 have been derived by growing the 2006 convenience figures by a rate of +1.0%pa. Convenience expenditure per head estimates for the period 2010-2026 have been derived by growing the 2008 estimates by a rate of +0.6%pa.

6.10 These growth rates are based on the advice set out in the latest Experian Retail Planning Briefing Note (Note 5.1, November 2007).

6.11 All monetary figures in the model are shown in 2006 prices.

6.12 Expenditure absorbed by Retail Sales Not in Stores (RSNS) has been deducted according to Experian estimates for each of the test years.

6.13 Experian defines RSNS as purchases via mail order (including purchases from wholly internet-based companies such as Amazon), purchases from market stalls and purchases from door-to-door salesman. It does not include internet sales of companies that operate shop floorspace, such as department stores.

6.14 Data from the household shopping survey has been manipulated to produce an informed estimation of the extent of internet shopping by residents of the survey area for use in the final retail study. Later in the assessment, an allowance has been made for the growth of this type of shopping activity in the Survey Area, based on Experian advice.

Total Potential Expenditure Estimates and Forecasts

6.15 Total potential comparison and convenience expenditure estimates are set out in Table 4 of Appendices 6 and 7.

6.16 Total potential expenditure has been estimated by applying the total average expenditure per head figures (Table 2) to the population estimates (Table 1) for each of the test years.

Market Share Estimates

6.17 Estimations of Rugby Town Centre's market share of expenditure on comparison and convenience goods have been derived from the findings of the household shopping survey.

6.18 Certain adjustments have been made to the survey findings using professional judgement. The purpose of these adjustments has been to re-allocate results to make allowance for rogue answers to the survey questionnaire and to group together answers that related to shopping facilities located beyond the survey area.

Comparison

6.19 The survey findings show that Rugby Town Centre currently draws the majority of its turnover from spending by residents in Zones 3-7, 10 and 12. This reflects the distances shoppers are typically prepared to travel for non-food shopping trips.

6.20 The survey findings indicate that Rugby Town Centre has a market share of 29% of the total available expenditure in the survey area on all comparison goods. This figure has been held constant over the period 2006-2026. The survey findings indicate that Rugby Town Centre has a market share of 36% of the total available bulky goods comparison expenditure in the survey area on all comparison goods. This figure has been held constant over the period 2006-2026.

Convenience

6.21 The survey findings show that the highest market shares of convenience goods expenditure attracted to Rugby Town Centre are from Zones 3, 4 and 6, reflecting the shorter distances shoppers are typically prepared to travel for food shopping trips.

6.22 The survey findings for each Zone have not been adjusted. It was considered that the unadjusted market shares for these Zones reasonably reflected the likely sales density figures for the shopping facilities within each Zone, consistent with the findings of the health check assessments.

Expenditure Attracted to Rugby Town Centre

Comparison

6.23 Estimates of expenditure on all comparison goods attracted to Rugby Town Centre from each zone are set out in Tables 5-18 of Appendix 6. Estimates have been calculated by applying the estimated market share figures to the estimates of total available comparison expenditure in the survey area at 2006 for each category of goods.

6.24 Estimates of expenditure on bulky comparison goods attracted to the Rugby area from each zone are set out in Tables 21a and 21b of Appendix 6. Estimates have been calculated by applying the estimated market share figures to the estimates of total available bulky comparison expenditure in the survey area at 2006.

6.25 Inflows of expenditure from beyond the boundary of the survey area to Rugby Town Centre were considered to be very low on account of the proximity of larger, competing centres close to the boundary of the survey area. As such, an allowance for comparison expenditure inflow to Rugby Town Centre from beyond the survey area boundary has not been made.

Convenience

6.26 Estimates of expenditure on convenience goods currently attracted to Rugby Town Centre from each zone are set out in Table 10 of Appendix 7. Estimates have been calculated by applying the estimated market shares from Table 9 to the estimates of total available convenience expenditure in the survey area (Table 3).

6.27 It has been assumed that there is no inflow of convenience goods expenditure to Rugby Town Centre from beyond the survey area boundary, reflecting the lengths of journeys people are typically willing to undertake for grocery shopping.

Turnover of Existing Retail Floorspace

6.28 An estimate of the turnover requirement of existing comparison retail floorspace in Rugby Town Centre is set out in Table 19 of Appendix 2. Estimates for existing convenience retail floorspace are set out in Table 8 of Appendix 7. An estimate of the turnover requirement of existing bulky comparison retail floorspace in the Rugby area is set out in Table 22 of Appendix 6.

Comparison Floorspace

6.29 Rugby Town Centre total comparison floorspace at 2008 is estimated to be 32,470 sq.m. gross. This figure is based on the November 2007 Experian Goad Centre Summary report for Rugby. It has been assumed that 75% of this relates to retail sales area, giving a net retail floorspace figure of 24,352 sq.m.

6.30 This figure does not include the floorspace of the former Co-op department store. This former store, together with a former public house and car park, is being cleared to allow for the delivery of the Chapel Street redevelopment.

6.31 Floorspace densities (turnover per sq.m.) figures for 2008 have been estimated by Drivers Jonas. It has been assumed that the average turnover/floorspace ratio for all comparison floorspace in Rugby Town Centre is £5,800/sq.m. This figure has been based on the findings of the health check assessments and a consideration of the trading performance of Rugby Town Centre in comparison to other competing and surrounding centres.

6.32 The turnover of existing Rugby Town Centre floorspace has been estimated by applying the estimated benchmark turnover per sq.m. figures to the estimated net comparison retail floorspace figure.

6.33 The total floorspace for bulky comparison retailing in the Rugby area is estimated to be 9,756 sqm net and is summarised in Table 22 of Appendix 6.

Convenience Floorspace

6.34 Data from the Institute of Grocery Distribution and Experian Goad has been used to provide a floorspace figure for the key convenience stores in the town centre. Additionally, data from Retail Rankings 2007 and Verdict 2007 has been used to make assumptions as to the proportion of each of the businesses that is used for the sale of convenience items and the proportion that is used for the sale of comparison items.

6.35 A floorspace figure for 'Other Convenience Stores' businesses collectively has been derived from Experian Goad.

6.36 The total figure for convenience floorspace at 2008 is based on the Experian Goad Centre Summary report for Rugby. It has been assumed that 75% of the Experian figure relates to retail sales area, giving a net retail floorspace figure of 4,076 sq.m.

6.37 Retail Rankings 2007 and Verdict 2007 have been used to source average annual turnover per sq m ratios for the key stores. The turnover per sq.m. figure for Other Convenience Stores, has been estimated by Drivers Jonas. It has been assumed that a reasonable benchmark average turnover/floorspace ratio for all convenience floorspace in Rugby Town Centre at 2006 is £4,000/sq.m.

6.38 The turnover of existing Rugby Town Centre floorspace has been estimated by applying the estimated benchmark turnover per sq.m. figures to the relevant net retail floorspace figures.

6.39 Future turnover requirement estimates of existing retail floorspace have been derived by growing the 2006 figures by a rate of +0.6% pa. This is Experian's recommended rate for projecting increasing convenience sales densities as set out in the latest Experian Retail Planner Briefing Note (Note 5.1, November 2007). These are set out in Table 13.

Future Turnover Requirements of Existing Comparison Floorspace

6.40 Estimates of future turnover figures of existing comparison floorspace (total and bulky goods) are set out in Table 23 and 24.

6.41 These figures were generated by growing 2008 estimates by a rate of +2.2%pa. This is the Experian recommended rate for projecting increasing sales densities and are set out in the latest Experian Retail Planner Briefing Note (Note 5.1, November 2007).

Turnover of Committed Floorspace

Comparison

6.42 The Chapel Street redevelopment will introduce a new Asda store and three comparison retail units into the town centre. Collectively, it is estimated that an additional 4,883 sq.m. net of comparison retail floorspace will be provided.

6.43 It has been assumed that the new comparison retail units will turnover at a rate of £5,800/sq.m. The turnover of the Asda store has been estimated using published Asda company average turnover data for comparison goods sales. Turnover estimates of the committed comparison floorspace for each of the test years have been derived by growing the 2006 price base estimates by the Experian recommended rate of +2.2% pa.

6.44 It has been assumed that the Chapel Street redevelopment will be fully trading by 2014 for the purpose of testing, although it is noted that full trading could be achieved before this date.

6.45 It is understood that there is a commitment for a new DIY store at the out of centre Tribune Trading Estate that needs to be considered in the bulky comparison assessment. It is understood that this will comprise 7,376 sqm gross. It has been estimated that the net sales area will be 5,163 sqm. It has been assumed that this store will open in 2010 and be fully trading by 2014.

Convenience

6.46 There is a commitment for a new full-range Asda store in the town centre as part of the Chapel Street redevelopment.

6.47 The gross floorspace of this store is 8,163 sq.m. The gross floorspace of the ground floor is 6,212 sq.m. and it is understood that there will be no retail sales space at first floor level. It has been assumed that net floorspace equates to 75% of the gross floorspace, giving a net floorspace figure of 4,659 sq.m.

6.48 Estimations of Asda's use of the net floorspace for the sale of both convenience and comparison goods have been sourced from Verdict 2007 and Retail Rankings 2007. Company average turnover figures for Asda have also been sourced from Retail Rankings 2007.

6.49 The estimated convenience turnover of the Asda store has been grown by a rate of +0.6%pa to provide estimates for each of the test years.

Internet Allowance

6.50 An allowance for a proportion of the total available expenditure from the survey area's residents has been made for internet shopping.

6.51 There is a high degree of uncertainty in projecting the uptake of new technology. There are differing views about e-commerce in general and the proportion of people's expenditure that is likely to be spent in this way. There are also practical difficulties in forecasting the floorspace requirements to service internet shopping. For example, an internet sale does not necessarily mean that items have not passed through a retail outlet. Some supermarkets source internet goods from store space. Where this occurs, use of the internet will have a minimum effect only on the need for new retail floorspace.

6.52 Experian recommend that a plausible conservative estimate of the broad market share of internet shopping will grow to around 13% for comparison spending by 2016. Conservative assumptions have been adopted for internet shopping for this Study. This is principally due to the uncertainty of projecting this type of shopping behaviour.

6.53 It has been assumed that the proportion of total comparison expenditure generated by residents of the survey area spent via the internet equates to an 8% market share at 2014 and 13% at 2020 and 2026. For bulky goods, estimates at 10% at 2014, 11% at 2020 and 12% at 2026 have been applied. The figures that have been applied represent a cautious view on how shopping might be undertaken in this way over the Core Strategy period.

6.54 The analysis leading to an estimated market share for Rugby has taken into account people within the catchment area choosing to purchase convenience goods via the internet, therefore a further allowance is not required

Estimates of Supportable Comparison Floorspace

6.55 Surplus available comparison expenditure has been calculated by subtracting the estimated growth in the turnover of existing town centre floorspace, the turnover of committed floorspace and the allowance for growth in internet shopping from the total available comparison goods expenditure attracted to Rugby Town Centre, based on constant market shares.

6.56 It has been assumed that at 2008, new comparison retail floorspace would turnover at a rate of £5,800/sq.m. Future turnover requirements for each of the test years have been generated by growing this figure by a rate of +2.2% pa. It has been assumed that the net retail floorspace of any additional units would equate to 75% of the gross floorspace.

6.57 The comparison retail model indicates that the following floorspace is theoretically supportable:

- 2014: 492 sq.m. net
- 2020: 9,233 sq.m. net
- 2026: 20,100 sq.m. net

6.58 Surplus available bulky comparison expenditure has been calculated by subtracting the estimated growth in the turnover of existing Rugby area floorspace and the allowance for growth in internet shopping from the total available comparison goods expenditure attracted to Rugby area, based on constant market shares.

6.59 It has been assumed that at 2008, new bulky comparison retail floorspace would turnover at a rate of £3,750/sq.m. Future turnover requirements for each of the test years have been generated by growing this figure by a rate of +2.2% pa. It has been assumed that the net retail floorspace of any additional units would equate to 75% of the gross floorspace.

6.60 The comparison retail model indicates that the following floorspace is theoretically supportable:

- 2014: 2,351 sq.m. net
- 2020: 3,469 sq.m. net
- 2026: 4,659 sq.m. net

6.61 In order to support new floorspace of this type, it would have to be shown that planning policy tests other than the requirement to demonstrate quantitative need, as set out in PPS6 and relevant local plan/LDF policy documents, are passed as relevant. Further, market conditions would need to be supportive to this scale of development.

Conclusions in Respect of Comparison Shopping

6.62 The above theoretical expenditure forecasts indicate that, based on unadjusted market shares, there is sufficient available comparison goods expenditure to support a significant amount of new comparison retailing floorspace in Rugby over the period up to 2026, taking the Chapel Street redevelopment into account.

6.63 A factor strongly influencing these forecasts is the high expenditure growth rates for comparison goods. There are other factors which could influence these estimates significantly. For example, if residents' expenditure continues to grow at this high rate, what proportion of it will be translated into shop floorspace requirements in accordance with past trends?

6.64 Factors that could cause the forecasts to be reduced would be higher company average sales densities of comparison retail floorspace than have been allowed for in our assessment. This could arise if increasing disposable incomes causes shoppers to purchase goods of a better quality and higher value rather than a greater quantity of goods. Similarly, greater use of the internet could play an increasing role for the purchase of certain types of goods for which comparison of goods at the time of purchase is not always necessary.

6.65 It is important to remember that the further ahead the forecasting date, the less certain the forecast. For the dates post 2014, it is suggested that forecasts should be treated with particular caution, since they only indicate the broad magnitude of retail capacity at those dates, if all current trends forecasts occur.

6.66 Whilst modest quantitative capacity for additional bulky goods comparison has been demonstrated, the Borough Council should seek to be satisfied that further growth in this sector is in the best interests of the Borough's shopping strategy. In particular, other policy tests such as the sequential approach to site selection, impact on existing facilities and the objective of reducing the need to travel would have to be considered when determining planning applications for bulky goods development.

6.67 There is every possibility that the development of new retail facilities within the Chapel Street scheme in the town centre will have the effect over time of increasing Rugby's attraction factor and therefore the proportion of people choosing to undertake shopping trips in the town centre. This would have the effect of increasing Rugby Town Centre's total market share. This principle applies equally to comparison and convenience retail market shares.

6.68 On the comparison shopping side, the extent to which this might occur will be dependent on the retailers who occupy the new retail units in the Chapel Street scheme, and indeed in any other new developments within the town centre. If for example the units are occupied by high-end fashion retailers or high-value electronic goods retailers, these could act as a significant new strength within the town centre's retail offer and could draw a significant amount of additional expenditure into the town centre. The likelihood of new retailers generating an uplift in market share would increase if those retailers are currently only represented in centres in locations that shoppers only travel to occasionally or if they provide a significantly different range of goods to other existing town centre retailers in the same category.

6.69 It is known that the convenience occupier of the Chapel Street scheme will be Asda. The closest existing Asda stores are in Coventry, Leamington Spa, Nuneaton and Hinckley. For people with customer loyalty to Asda, a new Asda store in Rugby is likely to attract people in the local area and discourage them from travelling to more distant centres, as they may currently be doing. It is currently not possible to conduct a bulk food shop at a full-range store in Rugby Town Centre. The introduction of this type of facility will therefore attract people wishing to shop at a destination close to their homes and perhaps combining this with linked trips to other uses and services in the town centre. These factors could all have the effect of increasing Rugby Town Centre's market share for convenience shopping trips.

6.70 It is not possible to accurately predict future increases in market shares as this is dependent not only on knowing the future performance of Rugby Town Centre's retail space, but also what developments might be brought forward in surrounding competing town centres. The retail assessment undertaken as part of this Study provides forecasts of potential available expenditure to Rugby Town Centre up to 2026. When looking this far in to the future, it is important to be conservative as forecasts beyond a five year period should be treated with an element of caution. A conservative and a robust approach has therefore been adopted to providing forecasts and have held the base year's estimated market share of 29% constant.

6.71 To give an indication of the effect that an increase in market share could have on the level of new floorspace that could be supported in the future, and assuming all other factors are held constant, the table below summarises a scenario whereby the total comparison market share of Rugby Town Centre is 31% (a 2% increase from the current market share):

	2014	2020	2026
Total available expenditure (£m)	736.31	1,010.55	1,394.50
Expenditure attracted to Rugby Town Centre (£m)	228.26	313.27	432.30
Total Rugby Town Centre turnover* (£m)	209.48	238.70	271.99
Internet shopping (£m)	2.14	14.69	20.27
Surplus expenditure (£m)	16.64	59.88	140.04
Assumed comparison turnover requirement (£/sqm)	6,609	7,531	8,581
Estimates supportable net floorspace (sqm)	3,357	12,080	28,252

*Turnover includes the turnover of the Chapel Street scheme

Future Convenience Retail Provision

6.72 Rugby Town Centre's current market share of the total available convenience goods expenditure of 5.5% is very low. There is no planning policy justification for seeking to hold this market share constant.

6.73 The introduction of a large, full-range Asda store as part of the Chapel Street redevelopment will have an effect on the Town Centre's total convenience retail offer and in turn, market share of the total potential convenience expenditure within the survey area.

6.74 The new Asda store will introduce 4,659 sq.m. net of new convenience floorspace into the Town Centre. This store will benefit from a prime town centre site and designation as part of Rugby Town Centre's primary shopping frontage. It is wholly compliant with the objectives of PPS6.

6.75 Drivers Jonas has not undertaken an assessment of where this new store will take trade from. It is reasonable to assume that the existing large out of centre stores in the Borough would experience the greatest level of trade diversion as the new store, on account of its size and product range, will directly compete with these stores.

6.76 It has been assumed that by 2012, the Asda store will be trading at company average turnover levels and that all existing convenience retail floorspace in the Town Centre will be trading at benchmark levels. This will have the effect of drawing into Rugby Town Centre a further £38.8m of convenience goods expenditure at 2012. This will generate an increase in total market share of 12% (from 6% in 2006 to 18% in 2012).

6.77 It has been assumed that the introduction of Asda into Rugby Town Centre will address an existing quantitative and qualitative convenience retail need. Whilst there is no pressing need to plan for yet further convenience floorspace in the Town Centre in quantitative terms, any proposals for town centre developments should be judged on their merits, particularly in regard of retail development being encouraged in policy terms in town centre locations.

Conclusions on Capacity Versus Regional Centres Study

6.78 To ensure that the results and recommendations of this Study are sufficiently robust to inform the preparation of local planning policies (including the preparation of a Town Centre Strategy and other relevant Development Plan Documents and Supplementary Planning Documents), it is important that the assessment of capacity and future need is based on a conservative methodology.

6.79 In that context it is not appropriate to adopt the use of ambitious assumptions for forecasting need as this would mean that the scope for the Borough Council to rigorously test the case for future retail related planning applications, supported by their own evidence of need, could be prejudiced.

6.80 The Roger Tym and Partners (RTP) Regional Centres Study (2006, and updated in 2007) (described in Section 3 of this Study report) covers a much wider area of assessment and is intended to inform regional planning policies covering a longer time horizon as part of the emerging revision to the Regional Spatial Strategy.

6.81 The Regional Centres Study includes a number of more ambitious assumptions relating to the assessment of future retail capacity across the Region than have been used for the purpose of assessing capacity for this Study report. In particular, this Study report has adopted more conservative and robust figures for population growth across the identified catchment area as calculated by Experian. It has also adopted more conservative assumptions for expenditure growth than used for the Regional Centres Study based on the advice contained in the latest Experian Retail Planners Briefing Note.

7. Leisure Market Commentary

Introduction

7.1 Key to establishing Rugby's current and future role in terms of leisure is the need to review trends in a number of markets of relevance. This section therefore presents an overview of the following sectors:

- Leisure
- Tourism
- Hotel
- Commercial leisure market
- Public sector leisure market

7.2 The section concludes with a summary table that identifies areas of growth and decline which will be material in seeking to identify and provide for future need.

Analysis of General Market Trends

7.3 The growth in expenditure on leisure and recreation has seen an increase of over 16.5% over the last 4 years, and although not outperforming the growth in general consumer spending as was the case at the turn of the Millennium, the leisure market still shows a healthy growth, as summarised in the following table.

Consumer Expenditure on Leisure and Recreation outside the home by Market (£m and £bn) 2002 – 2006

Category	2002	2003	2004	2005	2006 (est)	Change 2002 – 2006 (%)
Drinking in licensed premises	26,390	27,500	28,116	28,664	29,525	+11.9
Eating out	11,678	12,000	12,650	13,250	13,750	+17.7
Gambling [1]	7,638	8,454	9,739	9,779	10,650	+39.4
Sport and exercise	3,450	3,600	3,450	3,450	3,650	+5.8
Cinema [2]	755	742	770	770	775	+2.6
Leisure class fees	1,950	2,100	2,250	2,350	2,450	+25.6
Theatres, concerts and shows	1,325	1,350	1,450	1,550	1,650	+24.5
Spectator sport	725	700	675	750	800	+10.3
Other [3]	1,250	1,400	1,575	1,600	1,650	+32
Total (£m)	55,701	57,846	60,675	62,163	64,900	+16.5
Total consumer spending (£bn)	664.6	697.2	732.5	759.9	790.0	+18.8

(Source: Keynote 2006)

Note: [1] Sums Staked Less winnings (i.e. losses sustained

[2] Box Office Revenues

[3] Including membership of social clubs, admissions to social events (e.g. coffee mornings and car-boot sales) and admission to visitor attractions

7.4 Looking further ahead, Keynote forecasts that the leisure business market will show steady year-on-year growth at current prices, achieving a value of £73m by 2011, an increase of 10.3% from the value of the market in 2007.

Tourism Market

Analysis of General Market Trends

7.5 The tourism market is one of the world's fastest growing industries and conservative estimates value tourism in Britain for 2007 at £85 billion (*Source: VisitBritain*). Visit Britain estimates that the value of tourism in 2007 will increase by almost 4% compared to 2006, influenced by days out and short breaks, which are important parts of the general leisure and tourism market and in recent years these markets have gained momentum as result of increased disposable income. At the same time, working patterns dictate that the working population has less available leisure time, and to a higher degree choose to take days and short breaks out rather than longer domestic overnight holidays.

7.6 In addition to the growth forecast in the number of short breaks and days out, increases in demand for activities, authentic experiences and interpretation as a result of higher education levels, a higher availability of discretionary spend, and the growth of the 50+, or "grey market", which is anticipated to be 15% higher in 2010 compared to 2000, are also predicted.

7.7 In terms of inbound tourism, an estimated 31.4 million international tourists are forecast to arrive in the United Kingdom in 2007 with an overall spend of £15.8 billion. These visitors are generated principally from the USA, France, Germany, the Republic of Ireland and Spain with the purpose of visit attributed to: leisure tourism 32%; VFR 29%; and business tourism 27%.

Sub-regional Market

7.8 Tourism in Warwickshire is estimated to generate £4.8 million to the local economy. This spend is generated from an estimated 124 million visits, of which 10% are overnight visits (*source: Warwickshire Visitor Economy Strategy* 2004).

7.9 The Coventry and Warwickshire Visitor Survey (2006) highlighted that the majority of day visitors were from Warwickshire itself and the wider West Midlands with the limited number of staying visitors originating principally from the United States (27%) and Australia (20%). Many of these visitors (67%) were in transit staying at other locations either before or after their visit to the sub-region. This would suggest that the sub-region is not perceived as a destination in its own right offering multiple activities.

7.10 Second and third age visitors (i.e. 45-65+) accounted for 50% of the visitor sample and the forecast demographic changes are likely to see this proportion growing.

7.11 There was a significant percentage of repeat visitors (85%) which suggests a good level of satisfaction in relation to the current offer but poor in terms of attracting new visitors to the area. Reflecting the high level of day visitors, spend on accommodation accounted for only 14% of total spend which contrasts with 24% spent on food and drink.

7.12 Finally, visiting an attraction was cited as a key reason for visiting the sub-region (55%).

Rugby

7.13 On average, on an annual basis Rugby attracts in the order of 3.5 million visitors, with an average dwell time of 3.9 hours (*source: Rugby Economic Prosperity Strategy 2007*). It is of interest to note that a significant proportion of these visitors (79%) had previously visited Rugby reflecting the wider, sub-regional picture.

7.14 In terms of staying visitors, the vast majority (70%) fell within the visiting friends and relatives (VFR) category which may reflect the current accommodation supply commented upon in the next section.

7.15 Of those identified 57% of visitors cited "for pleasure" as the motivation for their visit. One-fifth of overseas visitors cited that they chose Rugby because it was the home of Rugby Football, although visiting parks, gardens and museums (as a category) was the most popular activity undertaken by visitors (52%), with shopping coming second (50%).

Hotels

Analysis of General Market

7.16 Since 2001, the UK hotel market has experienced growth of 12% (to July 2006) with turnover for British hotels in 2005 reaching £10.9 billion. An overview of the occupancy levels and average annual room rates is illustrated in the table below.

Hotel Performance in the UK		
Year	Average Annual Room Occupancy %	Average Annual Room Rate £
2001	71.8	70.05
2002	72.2	68.38
2003	71.7	67.86
2004	73.1	73.63
2005	72.5	76.45

(Source: Mintel 2006)

7.17 A number of key factors have characterised the UK hotel market in recent years. These have included in the following:

- There has been significant private equity and venture capital interest within the hotel market as "sale and lease back" has become a feature of the market with hotel companies focusing on "management of the asset", and global marketing and branding
- Smaller corporate and private hoteliers remain "opportunistic". The Knight Frank UK Hotel Review reported that Britannia, Menzies, Dawnay Shore, Q Hotels, Swallow and Aurora International all added to their property portfolio
- Budget hotels remain one of the fastest growing sectors accounting for 12% of room capacity which is expected to grow by 50% over the next four years, (source: Deloitte Touche). TRI Consulting reports that Premier Travel Inn and Travelodge collectively, are intending to add 300 hotels by 2010

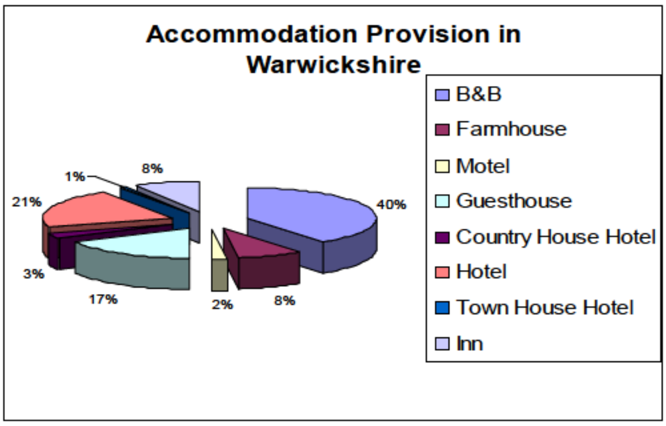
Regional and Sub-regional Market

7.18 According to research by Heart of England (2006) occupancy rates in the West Midlands are consistently high, with 2005 rates (44% room occupancy) placing the region 3rd in the country behind London (56%) and Cumbria (46%).

7.19 The number of hotel rooms in the West Midlands region was estimated at 42,437 in 2006, while the number of bedspaces was estimated at 90,177 with bedstock calculated to have risen by 23% between 2003 and 2006.

7.20 The room occupancy between 2001 and 2003 rose by 10.34% with the average occupancy for this period estimated at 62% *(2005)*. Bedspace occupancy from 2002-2004 averaged 44% with no increase achieved.

7.21 A 2006 audit by the Heart of England Tourist Board placed the number of bedspaces in Warwickshire at 14,632 and the number of rooms at 7,208 (NB 2006 data have been used both for consistency but also the 2007 report was more limited in terms of data). Occupancy in the region has been stable since 2002, with room occupancy varying from 63% to 65% and bedspace from 44% to 45% (source: Heart of England 2007). The accommodation offer in Warwickshire is largely Bed and Breakfast establishments, although there are a number of hotels as illustrated below.

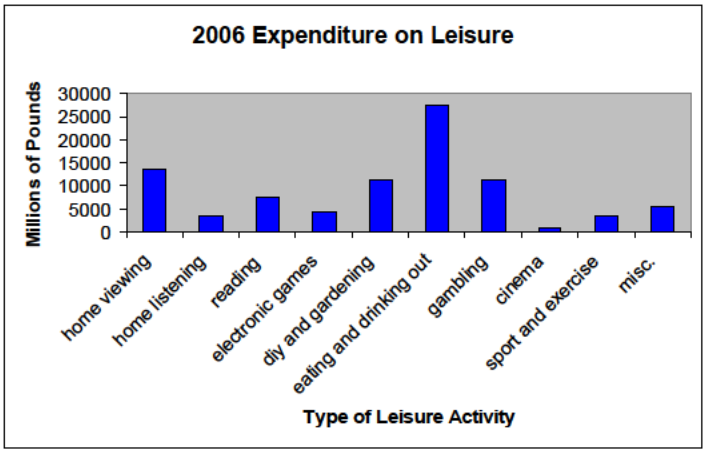


(source: Heart of England 2004)

Commercial Leisure Market

Introduction

7.22 Total leisure expenditure across the UK in 2005 was £89.3 million, according to Key Note's October 2005 Leisure and Recreation Market publication. Of this total, 31.6% was spent on eating and drinking out, while home viewing accounted for just over 15% and DIY and gardening and gambling accounted for approximately 13 and 11% respectively as illustrated below.



(source: Keynote 2006)

7.23 Leisure expenditure was predicted to total £65700 million across the UK in 2007, with eating and drinking out and gambling accounting for the largest proportion of this revenue. In 2007, leisure expenditure was estimated at 21.9% of household expenditure *(source: Leisure Forecasts 2007)*.

Food and Beverage

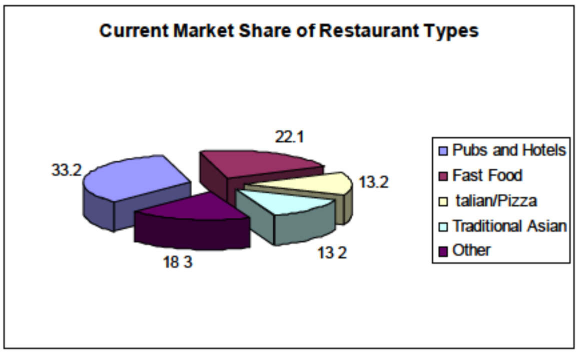
7.24 There has been a significant increase in the number of bars and restaurants in recent years as eating out in the UK continues to maintain its popularity, as longer working hours and an increase in the number of dual-earning households continues to reduce the time available for household meals. The Department for Trade and Industry (DTI) estimated that there were approximately 51,000 bar businesses in the UK in 2006 compared with 44,000 in 2000, and that there were 62,000 restaurants in 2006 compared with 46,000 in 1995.

7.25 The restaurant sector continues to have a relatively large representation of fast food outlets, representing about 30% of the total market, although the percentage of meals eaten in fast food restaurants as a percentage of all meals has fallen in recent years, as choice within the restaurant sector has widened and people have become more aware of healthy eating.

7.26 The significant growth potential of the market is underlined in recent research published by the Food and Drink Federation, which predicts that 50% of all UK food consumption will be eaten away from home by the year 2025. Key drivers of this trend include the high divorce rate, the rise in older people with increased personal disposable income (PDI), the desire for increased convenience and an increase in 'cash rich-time poor' individuals.

7.27 Whilst future patterns of consumer affluence will be an important factor in influencing spending on eating out, other factors such as the introduction of the smoking ban on 1 July 2007 will also impact. A recent study by PriceWaterhouseCoopers suggested that up to 50,000 pubs, bar and nightclubs could close by 2011 because of the ban on smoking, a potential decrease in consumer spending and restrictions on drinks promotions. Evidence from Scotland (Barclays 2007) however, suggests that restaurants and pubs which are "food led" have actually benefited from the ban.

7.28 Throughout the United Kingdom, pubs and hotel restaurants enjoy the largest share of the market, with fast food establishments next. Italian or pizza and traditional Asian eateries have an equal share of the market (see figure below).



(source: Keynote 2007)

Health and Fitness

7.29 The increased awareness of the benefit of sporting activity and the drive towards healthy lifestyles has underpinned both the increased spend in this sector and the growth in active sports participation.

7.30 In terms of participation there has been a steady growth in both indoor and outdoor sports with 69% of the population in England engaging in active sport. Upward trends in participation are a reflection of various factors, including:

- Increased awareness of health and fitness
- Improved nature of sports facilities
- National and regional development programmes

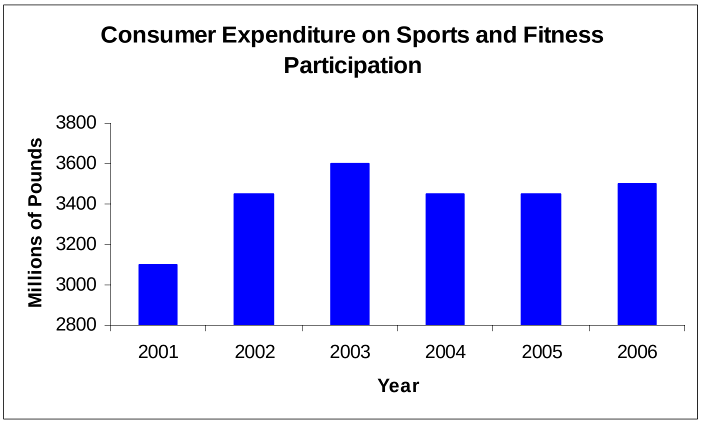
7.31 The popularity of participation in different sports is illustrated in the following table.

Sports Participation in England 2006	
Type of Activity	Percentage of Population taking part in last 12 months
Indoor swimming or diving	30.9
Health, fitness, gym	20.4
Cycling (not utility)	16.4
Outdoor swimming	14.2
Snooker, pool, billiards	14.2
Tenpin bowling	12.0
Aerobics, dance exercise	10.9
Golf	10.5
Football (including 5-a-side)	10.3
Jogging, cross country, road running	8.6

(Source: DCMS' Taking Part Survey, 2007)

7.32 The Health Club Benchmark Survey by Deloitte (2006) suggests that the private health club market is now stabilising with a projected decrease in membership numbers balanced by an increase in revenue from subscriptions between 2006 and 2007.

7.33 Changes in overall spend in this sector are illustrated in the following table and would tend to confirm that some market stability has been achieved.

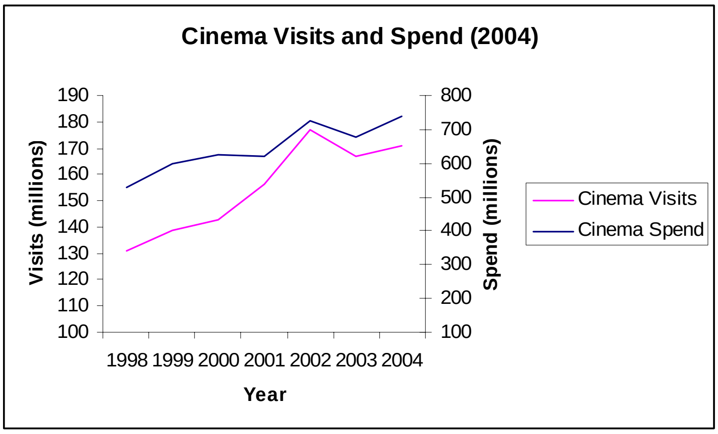


(source: Keynote 2006)

Cinema

7.34 Cinema represents one of the UK's most popular cultural and leisure pursuits. It enjoyed a revival in the mid-1990s, culminating in record audience figures of 176 million in 2002. This was due in part to a record breaking season of blockbusters including the first in the series of the Harry Potter and Lord of the Rings films.

7.35 As illustrated in the table below, both visits and spend at the cinema have increased strongly between the late 1999's to 2002, and after a decline 2002-2003 increased again in 2004.



(source: Keynote 2004)

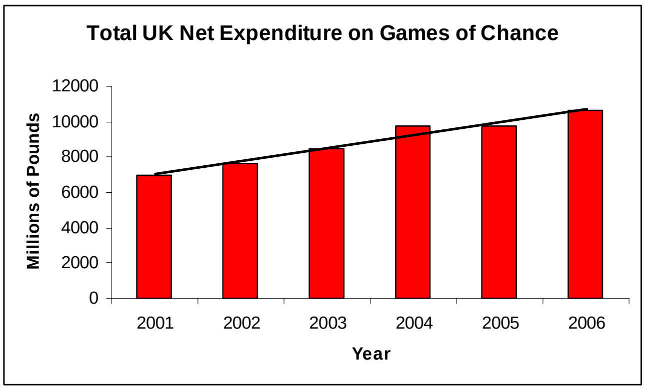
Casinos and Gaming

7.36 The British casino industry has developed strongly in recent years. The total drop (money exchanged for gaming chips) has increased by 31% over the period 1999/00 to 2003/04, from £3,109 million to £4,073 million. The casino market has undoubtedly benefited from a number of factors in recent years such as the growth in the UK economy, the general increase in the popularity of gambling and the deregulatory measures of 1999 (which included relaxation of membership rules, the ability to use advertising and rise in the number of jackpot machines per casino). Nevertheless, recent plans to further deregulate the sector have met with considerable opposition, evidenced by the “hold” by Government on major regional and large casino whilst they ‘rethink’ their policy.

7.37 Gaming represents a £9.4 billion industry in the United Kingdom, with the lottery and betting on dog and horse racing cumulatively being responsible for approximately 63% of the total value of the sector. Bingo halls represent a 5.6% share, while gaming machines and Casino gaming cover 22.6% and 7.7%, respectively *(source: Leisure Forecasts 2007).*

7.38 The UK bingo industry responded well to the threat posed by the National Lottery, primarily by redefining its product offering (through the development of large-scale bingo halls), and through successful nationwide advertising initiatives to widen its market profile. The number of bingo clubs operating in 2004 was 696, a small increase in the number of clubs operating in 2002. The Gaming Board of Great Britain estimates that there are currently 3 million active members of bingo clubs in Great Britain.

7.39 Overall, the take on games of chance throughout the UK has increased steadily from 2001 to 2007 as illustrated below.



(source: Leisure Forecasts 2007)

Ten-pin Bowling

7.40 Ten-pin bowling centres have evolved from centres focusing almost entirely on tenpin bowling, into centres offering a wide range of leisure facilities in addition to the core bowling offer. These facilities include branded (and often licensed) food and beverage offers, amusement arcades and pool tables.

7.41 Go Tenpin Magazine estimated that in 2004 there were 267 tenpin bowling centres within England with a total of 5,267 bowling lanes. 2007 estimates indicated that the number of centres grew to 269, while the number of lanes was reduced to 5,005.

7.42 Mintel (2004) estimates that spending on ten-pin bowling centres has increased in current terms by approximately 27% over the past 10 years. The estimated spend for 2004 was £260 million with the forecast for 2005 estimated at £269 million. The importance of ancillary spend (e.g. food and beverage, amusement arcades etc) is highlighted by the fact that these 'secondary' activities now account for approximately 50% of the total income stream.

7.43 According to Mintel (2006) the UK tenpin bowling market has increased in value by 17% between 2001 and 2006 and further research shows that 1.2 million adults regularly visit tenpin centres, while 5.9 million visit occasionally *(source: Mintel 2006).*

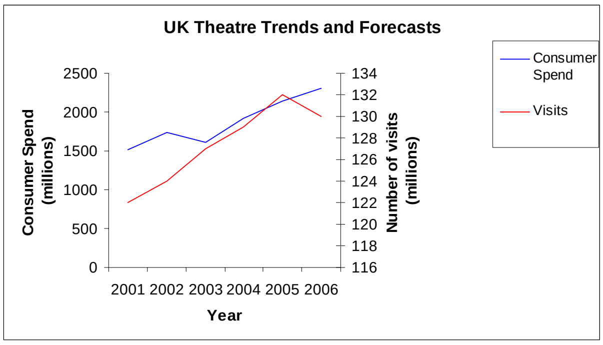
7.44 Overall, the tenpin bowling industry has grown by 17.17% over the 6 years from 2001 to 2006 as illustrated in the following table.

Year	Total Value of the Sector (in £m)
2001	233
2002	245
2003	255
2004	260
2005	265
2006	273

(source: Mintel 2006)

Performing Arts

7.45 Live arts spend showed a slow but steady increase from 1998-2004, while a decrease is now being seen in visits in this sector as illustrated below.



(Source: Leisure Forecasts)

7.46 The latest available figures from Mintel (2005) reported that the value of the UK live entertainment market was £1.4 billion with an expenditure on live entertainment (excluding refreshments, merchandise etc) of £2.18 billion.

7.47 In particular the music sector has continued to dominate the events and festivals market with established acts playing in large capacity venues. Keynote has estimated the live music market to be worth approximately £600 million per year in admission charges alone in 2005, demonstrating a growth of over 70% in value. In contrast, the value of theatres and shows has remained relatively constant over the same period. Financial growth in the concert and live entertainment market can be seen in the table below.

The UK market for concerts, theatres and commercial shows by value (£m) 2001-2005					
Year	2001 (m)	2002 (m)	2003 (m)	2004 (m)	2005 (m)
Live Music	350	475	525	600	600
Theatres and Shows	800	850	825	850	800
Total	1,150	1,325	1,350	1,450	1,400
% Year on Year Change	-	15.2	1.9	7.4	- 3.5

(*Source: Keynote 2006)*

7.48 There is a lack of consistent data regarding the size of the UK performing arts market, in part because of the blurred boundary between professional and amateur companies, as well as the diverse types of full and part time venues. *(source: Mintel 2006).*

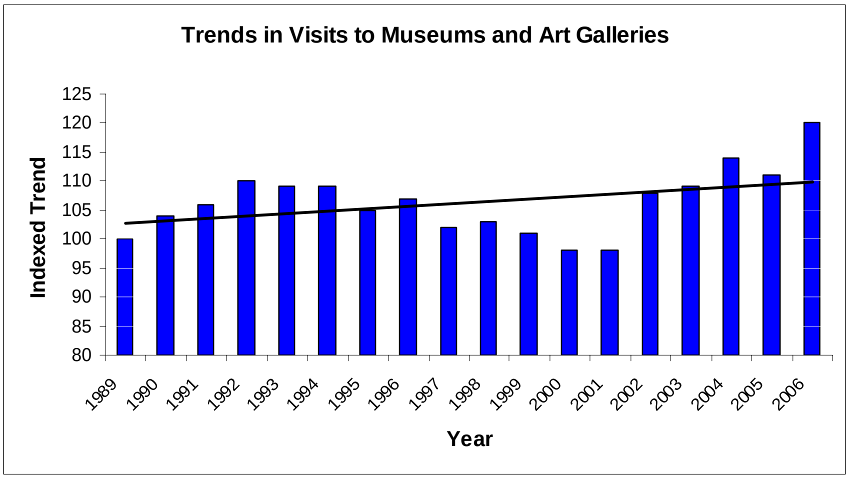
7.49 SOLT (the Society of London theatres) recorded a record-breaking year in 2005, with a number of extremely popular West End musicals showing in that year, including the openings of Dirty Dancing, Wicked and Guys and Dolls. Over the past five years, (2001-2006) ticket prices in London have risen by 22%, while attendances have risen by 5.54% *(source: Mintel 2006).*

7.50 Regionally, the number of tickets sold has decreased by approximately 10%, though the decreasing number of performances (12% decline) has resulted in an overall increase in the number of tickets sold per performance (2.15%) (data represents 2000-2006 figures provided by TMA (the Theatrical Management Association)) *(source: Mintel 2006).* Ticket prices have risen only 12.5% regionally between 2001 and 2006, and remain at half the value of London Tickets (*source: Mintel 2006).*

7.51 In 2005, two fifths of the UK population attended the theatre. Current areas of focus in the industry are reaching new audiences, education and pricing initiatives (*source: Mintel 2006).*

Museums

7.52 Museum and art gallery visits accounted for 26% of Day Out visits in England in 2006, an increase of 8% from 2005. This was the highest percentage, and was followed by visits to historic properties at 19% (source Visit Britain Visitor Attraction Trends). Throughout the UK, museum and art gallery visits have shown a positive trend since 1989, and recent growth has been strong despite a decline in the late 1990's as illustrated below (*source: Visit Britain Visitor Attraction Survey 2006*).



(source: VisitBritain 2006)

7.53 This growth has been reflected in the West Midlands with visits to museums and art galleries increasing by 8% from 2005 to 2006 *(source: Visitor Attraction Survey 2006*).

Public Sector Leisure Market

7.54 In terms of local authority provision of sport and recreation facilities, leisure remains a discretionary service for local authorities despite the growing awareness of the benefits of exercise and healthy lifestyles. Local authority facility development is influenced by a number of factors, including:

- A continuing decrease in the percentage of local authority budgets spent on leisure
- A need to consider alternatives sources of funding for facility development
- Increased pressures on National Lottery funding which historically has been one of the key sources of funding local authority leisure facilities in recent years

7.55 The combination of these factors has meant that local authorities increasingly are considering alternative opportunities for generating funding, including:

- Establishment of Trusts
- Long term management contracts with private contractors, through, for example, public-private partnerships (PPP), Section 106 agreements with developers, or linking with other providers such as the Health Boards.

7.56 A further recent trend of note has been the increasing role of education in the delivery of community sport and recreation opportunities. Education providers have become increasing involved in the provision of opportunities for sport and recreation through government policy initiatives such as the New Opportunities Fund/Big Lottery Fund.

Comment

7.57 Whilst the general outlook for the leisure sector remains positive, clearly there are a number of factors that will continue to affect operators such as: the continued growth of the internet; the long term move towards healthy lifestyles; and government legislation such as the Smoking Ban, which will have an impact not only on bars and restaurants but also on bingo and casinos. Key changes highlighted in this section are summarised in the following table.

Summary

Sector	Change in 2001-2006 (unless otherwise indicated)
Tourism	Domestic trips decreased by 2.8% (from 2002). Inbound trips have increased by 27.9% (from 2002) Inbound spend increased by 27.9 (from 2002). Domestic spend increased by 18.2% (from 2002)
Hotels	Steady occupancy rates in both England and the UK over the past 10 years – market now levelled off in some categories Revenue has increased by 14.6%
Commercial Leisure	Overall spend on leisure increased by 24.3%
Food and Beverage	6.4% growth in number of adults eating out and 9.7% decrease in number of adults drinking out
Health and Fitness	31.0% increase in health and fitness spend and 19.7% increase in overall fitness active sport spend
Cinema	Overall increase in visits of 1.28% and in spend of 15.5%
Casinos and Gambling	Increase in total spend of 31.6%
Ten-Pin	Sector has grown by 17.2%
Performing Arts	Increase in visits of 6.6% and spend of 52.9%
Museums	Increase of 6.6% in visits and 16.7% in spend

8. Assessment of Leisure Need

Introduction

8.1 This section provides a commentary on likely future demand within the key leisure sectors previously highlighted. This assessment must be caveated by the fact that the sector as a whole is dynamic and ever changing and, as a consequence, difficult to predict with certainty. The following therefore provides guidance and should be used to inform the potential allocation of land for future significant leisure floorspace and/or the preparation of a robust planning policy framework for the assessment of leisure proposals within and outside of Rugby Town Centre.

Influencing Factors

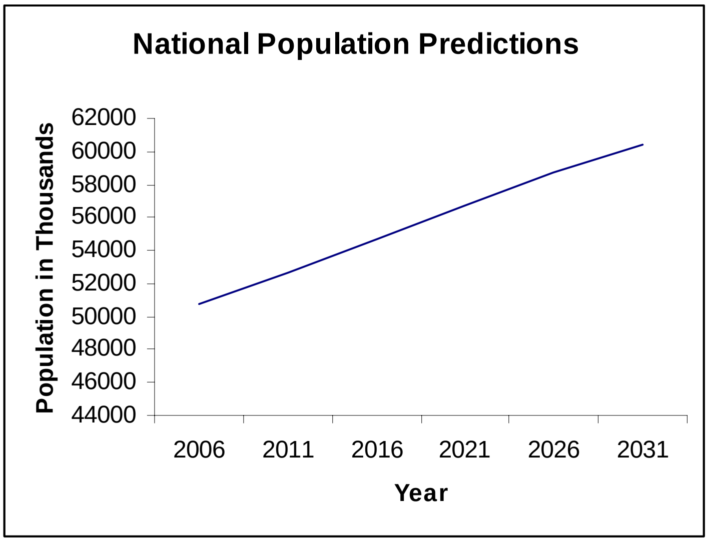
8.2 Future leisure demand will be influenced by a number of factors including the following:

- Population growth/demographic changes
- Economic performance (nationally, regionally, locally)
- Legislative change
- Environmental and technological change
- Infrastructure change
- Historic market performance and competitive change

8.3 Taking the foregoing into consideration, the following paragraphs comment on anticipated population and demographic change and then consider likely change in key leisure sectors.

National Population Changes

8.4 The following graph highlights predicted population growth between 2006 and 2031 which is estimated at 17.4%. Over the period, the demographic ‘make up’ of the population is anticipated to change with the over 65s increasing by 61%.



(source: ONS 2007)

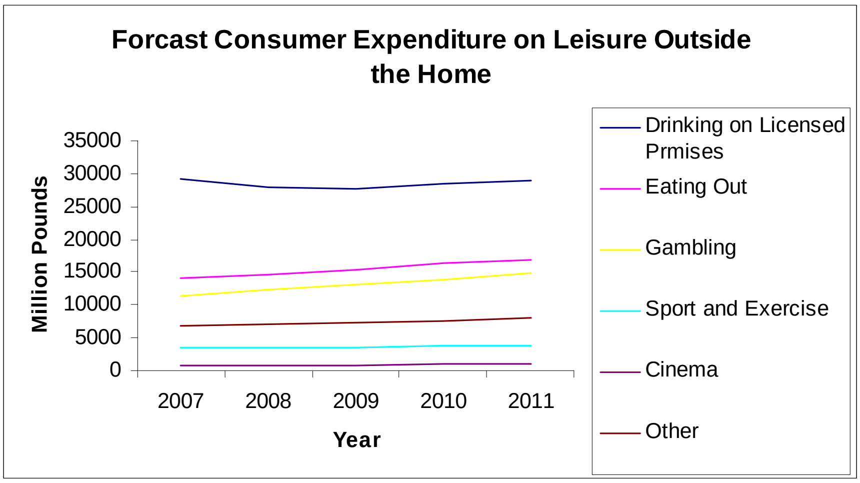
8.5 In respect of leisure, to beyond 2010, the increasing number of older people and retired people is likely to result in a greater number of people with disposable income and leisure time. Also of relevance will be the exposure of younger people to the concept of increased choice and quality of leisure *(source: Mintel 2006).*

Rugby Population

8.6 At the time of the Census in 2001, Rugby's population was estimated at 90,200 *(source: 20:20 vision)* with growth evident over the preceding years. More recent data (April 2007 – Economic Prosperity Strategy) confirms a population of 91,600 of which 48,200 were economically active. In terms of socio-economic profile, it is interesting to note that Rugby has a more affluent population (65% ABC – *source: Economic Prosperity Strategy*), higher than the national average.

Leisure Trends

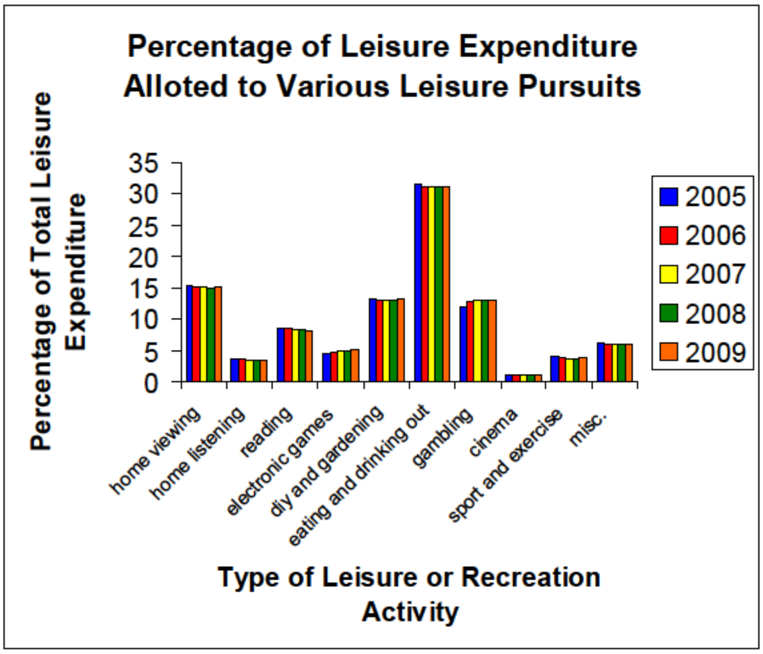
8.7 It is anticipated that the leisure industry will grow marginally with the percentage of household income being spent on various leisure pursuits rising from 21.9% in 2007 to 22.3% in 2010 *(source: Keynote 2007)* as illustrated in the following graph.



(Source: Keynote 2007)

8.8 Growth in consumer expenditure over the period 2007-2011 is predicted in: eating out (19.9%); gaming (30.3%); sport and exercise (5.6%) and cinema (20.00%); with overall growth across all leisure sectors outside the home averaging out at 11.5%.

8.9 However, the percentage of the leisure spend that will be allocated to individual activities will not change as illustrated in the following bar chart.



(source: Keynote 2007)

Tourism Trends

8.10 VisitBritain predict slow growth in the tourism arrivals sector in 2008. Although historical trends would suggest annual growth in the order of 3-4%, industry experts suggest a more cautious figure of 2% *(source: visitBritain 2007)*, which reflects, to a large extent, what has happened historically.

8.11 Factors likely to impact on tourism in the near future include: the weather; terrorism; aviation industry unrest; and agricultural health concerns (i.e. Foot and mouth, avian flu, etc.) *(source: visitBritain 2007)*.

8.12 On the positive side of equation, future influences will include the Open Skies agreement allowing increased transatlantic travel; major events in Liverpool (as part of the Capital of Culture Celebration) and London (to mark the beginning of the Olympiad); increased short-haul flights within European increased passport ownership in North America allowing greater transatlantic travel; greater rail travel through the new Channel Tunnel route; increased capacity at Heathrow and greater flexibility in security restrictions *(source: visitBritain 2007)*.

8.13 Predicted negative factors will include: increasing costs due to increasing oil prices; a decreasing global economy (particularly in the United States); threats due to terrorism and health risks; and increasing competition from low-cost destinations *(source: visitBritain 2007)*.

8.14 Domestic trips decreased by 2.8% from 2002 to 2006, and are projected to increase from the 2006 level by 1.00% by 2011. Inbound tourism is projected to increase by 13.6% from 2006 to 2011, after an increase of 27.9% 2002 to 2006. Inbound spend will show an increase of 15.00% from 2007-2011, after an increase of 27.9% from 2002. Domestic spend will increase by 16.6% from 2006 to 2011, after an increase of 18.2% from 2001 (see table below).

	Domestic Trips		Inbound Tourism	
	Trips (in millions)	Spend (in £m)	Trips (in 000)	Spend (in £m)
2002	42.2	8153	7735	3702
2003	43.5	8919	7973	3683
2004	41.9	9489	9275	4218
2005	40.7	9544	9693	4508
2006	41.0	9639	9889	4733
2007*	40.9	10051	10269	4931
2008*	40.7	10520	10656	5149
2009*	41.3	10834	11064	5360
2010*	41.2	11327	11494	5583
2011*	41.3	11722	11660	5668

(source: Mintel 2006)

** = forecast data*

Hotel Trends

8.15 Throughout the UK, some growth in the hotel market will be experienced. An additional 23,000 rooms are expected in the 2008-2009 period *(source: Leisure Forecasts 2007).*

8.16 Average occupancy over the past 10 years is illustrated in the following table and reflects an increase in of 4.4% in England and 6.8% in the UK and an increase in rooms provision in the UK by 1.7%.

	England		UK	
Year	Bedspace	Rooms	Bedspace	Rooms
1997	45	62	44	60
1998	44	61	43	59
1999	44	60	42	58
2000	44	60	43	58
2001	43	59	42	57
2002	44	60	44	59
2003	45	60	44	59
2004	46	62	45	61
2005	45	60	44	59
2006	47	62	47	61

(source: visitBritain Occupancy Survey 2001, 2002 and 2006)

8.17 Revenue generated by the hotel industry has increased by 14.6% between 2002 and 2006, and is projected to increase by 6.4% between 2007 and 2011 as illustrated in the following table.

Year	Revenue (£m)
2002	9,776
2003	10,070
2004	10,462
2005	10,900
2006	11,200
2007*	11,407

Year	Revenue (£m)
2008*	11,389
2009*	11,542
2010*	11,861
2011*	12,133

(source: Mintel 2006)

** = forecast data*

Commercial Leisure Trends

Food and Beverage

8.18 Based on industry intelligence, growth in the food and beverage sector reflects in part people's desire to be healthy, eating out rather than just drinking, combined with the lifestyle that leads people to want to eat quickly *(source: Keynote 2007).*

8.19 As commented upon previously the leisure industry is subject to rapid change with restaurant eating in particular heavily influenced by fads and trends, particularly those based on television and ethnicity choices *(source: Keynote 2007).*

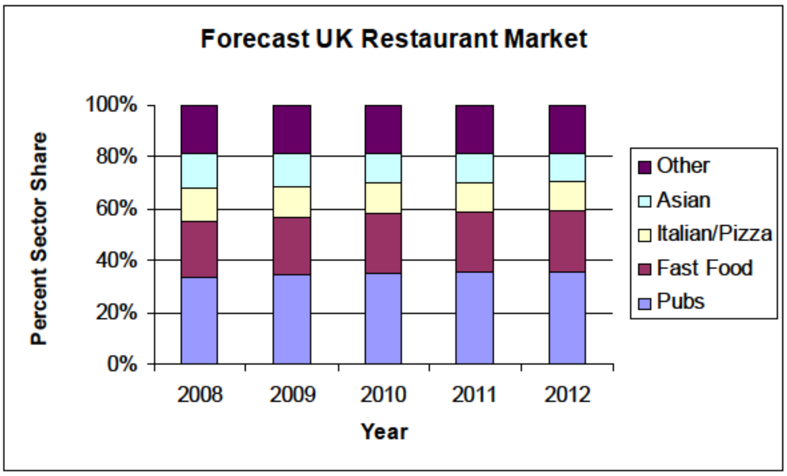
8.20 In terms of major influencing factors on the development of this sector the Smoking Ban, which came into effect the 1st of July, 2007 is by far the most relevant. Studies in Scotland, where the ban was established in 2006, indicate that the small decrease in drink sales precipitated by the ban has been offset by significant increases in food sales *(source: Leisure Forecasts 2007).* In relation to England, insufficient time has elapsed for the impact to be discernible although industry experts have suggested that though the innovative provision of facilities for smokers, a competitive edge could be achieved.

8.21 In relation to the sub sectors, we would make the following observations:

- Sales of beer are expected to continue to decline while wine, cider and spirit sales are predicted to continue to grow *(source: Leisure Forecasts 2007)*
- The ethnic market is reaching saturation, and the majority of future growth is forecast to come from healthy options and shops *(source: Keynote 2007)*
- The fast food sector is considered a mature market with little room for growth, the exceptions being pizza, sandwich and coffee shops reflecting growth over the last 5 years (see below) *(source: Keynote 2007).*

8.22 In the next five years, the pizza market is predicted to grow by 21.9% particularly as a consequence of online ordering systems although sandwich shops will experience the greatest growth at 23.3%. The burger sector is forecast to grow by 10.8%, predominantly in the area of healthy options food. Chicken restaurants and fish and chip shops are expected to see growth of 13.7% and 6.6% respectively *(source: Keynote 2007).*

8.23 An overview of forecast changes are illustrated in the following table.



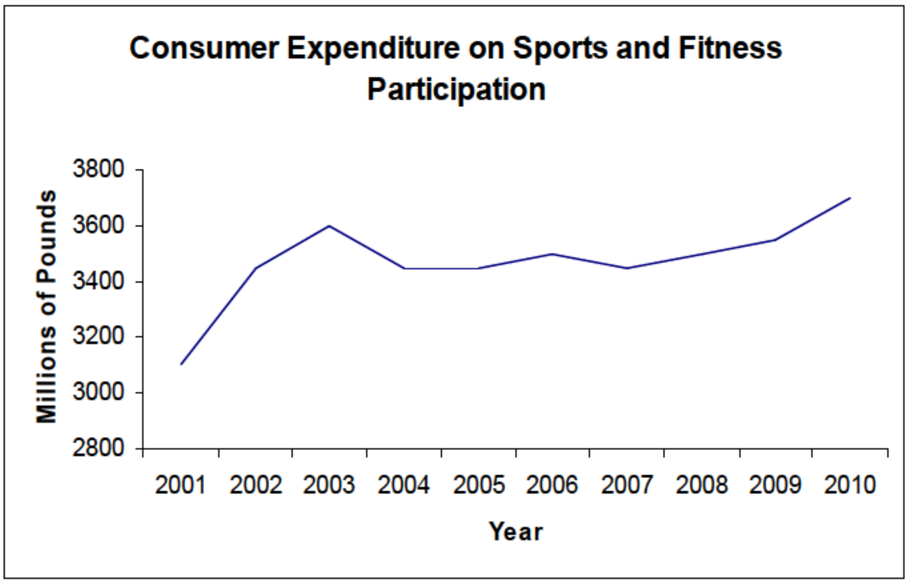
(source: Keynote 2007)

8.24 Of particular relevance to this study is the growth in the number of adults eating out (6.5%) since 2001, with continued growth of 1.8% predicted to 2011. Therefore, an overall increase of 8.3% is forecast to be achieved between 2001 to 2011 *(source: Leisure Forecasts 2007).*

Health and Fitness

8.25 Participation in sports and fitness is anticipated to continue to grow. In particular, the number of private health clubs in the UK has grown, with an increase of 33% from the mid 1990's to mid 2000's being recorded. Current market changes include the consolidation of brands (such as Virgin) which in part reflects stabilisation of the market, with saturation reached in some geographic locations *(source: Keynote 2006)*.

8.26 Although health club membership has stabilised, growth in the sports, health and fitness expenditure is projected to grow in the order of 5.7% over the 2006 to 2010 period as illustrated in the following table*(source: Keynote 2006).*



(source: Keynote 2006)

8.27 The number of adults taking part in active indoor sports is expected to show an overall decrease of 100,000 persons from 2001 to 2011 (-0.5%), while the number participating in active outdoor sports will grow by 1.1 million (+4.2%) in that same period *(source: Leisure Forecasts 2007).*

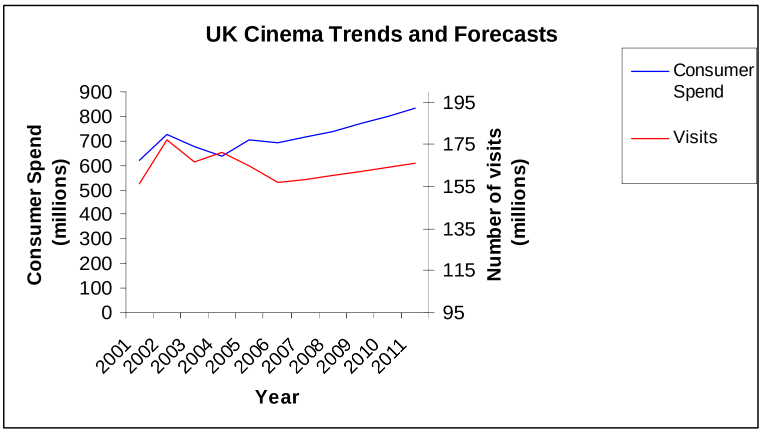
8.28 Total consumer spend on health and fitness will increase by 8.3% per annum from 2001 to 2011, while total active sport spend will increase by a total of 51.5% over the same period *(source: Leisure Forecasts 2007).*

Cinema

8.29 A recent report by Mintel 2006 highlighted that growth in attendance and box office revenue is expected to continue over the next few years.

8.30 After a strong summer of record breaking openings in 2007, the cinema market is expected to maintain its standing. Although, the primary target market of the cinema industry (the 18-24 year olds) is shrinking reflecting changing demographics, this age group has grown up expecting to pay heavily for leisure which will help the industry to maintain its current financial standing. Additionally, though the number of visits will remain relatively stable, increased ticket and concession costs will raise the value of the industry *(source: Keynote 2001).*

8.31 The number of visits to cinemas therefore will see a growth of only 0.7% over the 2007-2011 period and will not reach the visitation levels achieved in 2002 within this time frame. However, this will be balanced by the spend at cinemas which will increase by 16.5% over 4 years, and will "top" 2002 levels by £110 million *(source: Leisure Forecasts 2007),* as illustrated in the following table.

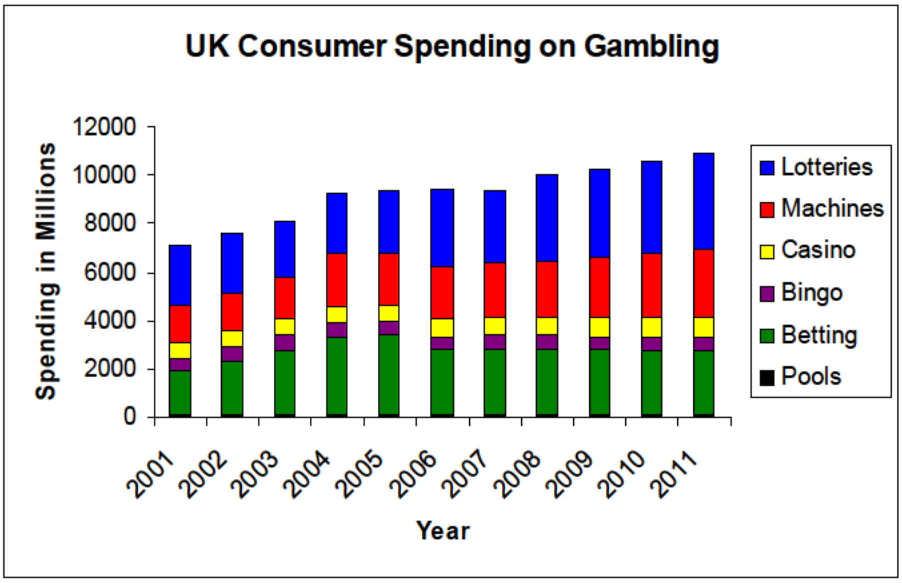


(Source: Leisure Forecasts 2007)

8.32 Overall growth from 2001 to 2011 is anticipated to be 6.41% for visits, 16.7% for the number of screens, and 34.5% in spend *(Source: Leisure Forecasts 2007).*

Casinos and Gaming

8.33 The lottery will continue to play a crucial, and indeed increasing, role in the UK gambling market over the next 5 years (see figure below). While the overall gambling industry is set to increase to £10.9 billion by 2011, the bingo market is anticipated to suffer with the recent introduction of the smoking ban.



(source: Leisure Forecasts 2007)

8.34 Lotteries and machines are anticipated to play an increasing role in their contribution to gaming to the economy in general, with increases of 29.8% and 24.8% forecast over the next four years *(source: Leisure Forecasts 2007)*.

8.35 Overall growth in total gambling spend from 2001 to 2011 has been forecast at 5.3% year on year, with total growth over the period of 52.6% *(source: Leisure Forecasts 2007)*.

8.36 The new (2005) Gambling Act, which enables the creation of new casinos, as well as changing regulations regarding current facilities, will have a significant impact on the gaming industry. For example, the number of casinos is set to rise from the current 139 to 294. Also, the opportunities presented by the bill for bigger "Las Vegas-style" facilities is expected to attract the American gaming groups, and the US is expected to develop a significant presence in the UK market within 5-10 years *(source: Leisure Forecasts 2007)*. These changes however have been 'put on hold' by the Government and the likelihood now seems that a reduced number of small and larger casinos will be permitted but not the regional size.

Ten-pin Bowling

8.37 The Tenpin bowling market is expected to continue to be successful in the future due to its cross-generational appeal. Kids' parties, work-do's, adult leagues and family entertainment are all sectors which tenpin bowling penetrates and these are expected to continue with new markets such as the "grey" market targeted for the future *(source: Mintel 2006)*.

8.38 Looking forward, the market is expected to be based on growth in small independent companies, primarily based in town-centre locations, as well as a move towards a more adult-centred type of bowling facility. There is an expectation that the reliance on income sources generated from sources other than bowling will continue, with catering revenue expected to remain in the region of 50% of total revenue.

8.39 Overall revenue is expected to increase by 18.0% over the period from 2006 to 2011 as illustrated in the following table.

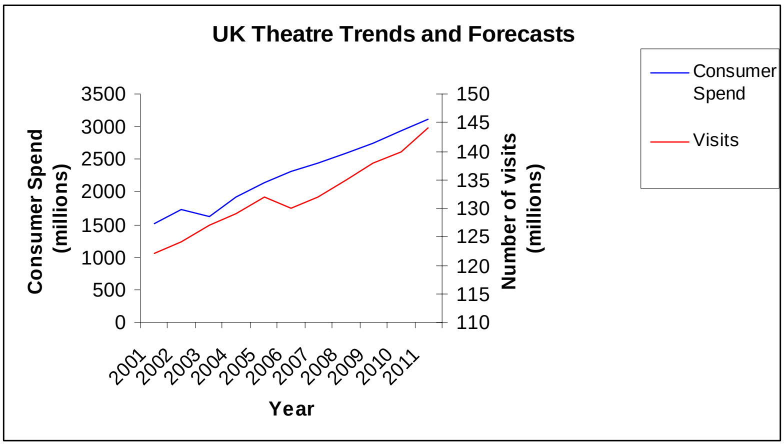
Year	Forecast Revenue (in £m)
2006	273
2007	281
2008	290
2009	301
2010	312
2011	322

(source: Mintel 2006)

Performing Arts

8.40 The live or performing arts market is currently strong, with both visits and consumer spending increasing. As a result of this growth, the market share has increased, from 32.7% in 2001 to 38.3% in 2006, with future growth predicted to reach 39.8% in 2011 *(source: Leisure Forecasts 2007).*

8.41 Overall growth from 2001 to 2011 is estimated at 18% for visits (or 1.8% per year), and 106% (or 10.6% per year) for spend as illustrated in the following graph.



(Source: Leisure Forecasts 2007)

8.42 Both visits and spend at performing arts events will increase from 2007 to 2011, though growth in spend will outpace growth in visits (6.7% per year for spend compared to 2.3% per year for visits) *(source: Leisure Forecasts 2007).*

8.43 Although the industry was anticipated to continue to experience increased investment in both the commercial and public sectors the impact of the 2012 Olympics and diversion of public sector funds is likely to adversely affect this sector. However, on the positive side another major trend that may have a significant impact on audience numbers is the exploratory use of new media to bring the arts to new audiences. An example of this is The Met Opera Company (USA) which is showing many of its new operas in cinemas throughout the United States, allowing an easy way for those unfamiliar with opera to experience it in a familiar setting) *(source: Mintel 2006)*.

Museums

8.44 Visits to both historic buildings and museums/art galleries will increase steadily over the next five years, as will visitor spend at these facilities due to both increased admission charges and increased secondary spend. Overall visits to attractions are expected to rise by 16.2% in the period 2001-2011, while visitor spend will increase by 54.8% over the same period *(source: Leisure Forecasts 2007).*

Summary

8.45 This section has reviewed market demand in key sectors of relevance to this study identifying growth particularly in food and beverage, health & fitness and gambling.

8.46 The foregoing presents quite a "mixed bag" in terms of assessing future demand in the sectors of relevance to this study. Key growth areas include: food and beverage; health & fitness; and gambling related. Undoubtedly, all sectors may, in the short term, be affected by external influences such as economic decline (particularly if the USA falls into recession); nonetheless, the impact is likely to be short term.

8.47 In regards to the responses from the surveys it is striking to note the overall low interest in leisure related activities with current provision deemed as poor. Notwithstanding this, a degree of disinterest is noted in relation to what factors would influence future use and again disinterest is evident. Some displaced demand is evident in the Household Survey responses although this is balanced by the obvious use of Rugby's facilities. Of all the facilities commented upon, only nightclubs are not represented in Rugby although from anecdotal comment a number of establishments have opened but have not been successful.

Summary Assessment of Leisure Need

8.48 Utilising the preceding information on the relative robustness of the leisure market (in general and by sector), assessment of likely future demand and analysis of the current leisure offer in the town, potential future need has been assessed and this is summarised below.

Leisure Need		
Accommodation	-	Need for a good quality hotel in the town centre i.e. 3 or 4* (or boutique style) – this is based on a) the likely penetration of the Ramada satisfying existing latent demand (e.g. Rugby School) and b) the impact of a new brand which, through brand loyalty is likely to lead demand
	-	The proposed Ramada Hotel will satisfy immediate demand with the potential for a future branded hotel to follow
Food and Beverage	-	Reasonable provision with strong presence of independent sector. Need to establish a permanent 'quarter' linking with other evening economy activities such as theatre and linking with an enhanced retail offer
	-	Greater focus to be made to improve the quality of some pubs potentially using a 'Pub Trail' linking the quality

		end/heritage related offer
Health and Fitness	-	Potential in- town opportunity although the re branding of an existing facility to LA Fitness may well satisfy immediate need. Market stabilisation in health and fitness suggests current supply (mostly edge/out of town) will satisfy demand
Tenpin bowling	-	Current provision sufficient
Cinema	-	Current provision of 9 screens sufficient although many be potential for an 'arts cinema' – similar to the Cornerhouse in Manchester – reflecting market trends
Casinos/Gaming	-	Population catchment considered too small to attract a new casino with bingo provision currently satisfactory
Performing Arts	-	Current provision satisfactory – needs to form part of total cultural offer, linking with evening economy

9. Appraisal of Potential Town Centre Sites

9.1 This section of the Study report provides an appraisal of the potential for existing sites within Rugby Town Centre to accommodate the development of new floorspace to meet the retail and leisure needs identified within this Study.

9.2 In accordance with the sequential approach to site selection advocated in PPS 6 (2005), this section gives preference to the identification of sites within the current designated Town Centre boundary as identified by the adopted Rugby Local Plan (2006). This section does not seek to provide an appraisal of any out-of-centre sites that might be suitable or available for retail or leisure uses as there should be an emphasis on ensuring that all Town Centre opportunities are fully tested ahead of any other sites lower down the sequential sequence.

National Planning Policy Context (PPS 6)

9.3 PPS 6 (2005) sets out clearly that the Government's key objective for Town Centres is to promote their vitality and viability by:

- Planning for the growth and development of existing centres; and
- Promoting and enhancing existing centres by focusing development in such centres and encouraging a wide range of services in a good environment, accessible to all (Paragraph 1.3).

9.4 As part of the proactive and "Plan-Led" approach to promoting growth and management of change in town centres, national planning guidance advocates the use of planning tools such as area action plans, compulsory purchase, and town centre strategies to address issues of land assembly and comprehensive planning design for the growth of town centres.

9.5 Under the heading 'Promoting Growth and Managing Change in Town Centres', the guidance contained in PPS 6 is set out as follows:

> *"Wherever possible, growth should be accommodated by more efficient use of land and buildings within existing centres. Local planning authorities should aim to increase the density of development, where appropriate. Opportunities within existing centres should be identified for sites suitable for development or redevelopment or where conversions and changes of use will be encouraged for specific buildings or areas.*
>
> *Local planning authorities should seek to ensure that the number and size of sites identified for development or redevelopment are sufficient to meet the scale and type of need identified. Where growth cannot be accommodated in identified existing centres, local planning authorities should plan for the extension of the primary shopping area if there is a need for additional retail provision or, where appropriate, plan for the extension of the town centre to accommodate other main town centre uses.*
>
> *Where extensions of primary shopping areas or town centres are proposed, these should be carefully integrated with the existing centre both in terms of design and to allow easy access on foot." (Paragraphs 2.4 to 2.6).*

9.6 Under the separate heading 'Promoting High Quality Design and Making Efficient Use of Land', the guidance also states that:

> *The Government is concerned to ensure that efficient use should be made of land within centres and elsewhere. Local planning policies should formulate planning policies which encourage well designed, and, where appropriate, higher-density, multi-storey development within and around existing centres, including the promotion of mixed use development and mixed use areas." (Paragraph 2.20)*

9.7 Appendix 8 of this Study provides a detailed appraisal of ten potential site opportunities for retail and leisure development within the currently designated Rugby Town Centre boundary. The appraisal is accompanied by a plan identifying the location of each of the site opportunities with indicative boundaries.

9.8 Each of these sites have been tested in the context of the above national planning guidance, and in particular with an emphasis on potential opportunities for making more efficient use of land by increasing the density of development, as well as the scope for extensions to the existing Primary Shopping Area/ Town Centre Shopping Area identified by the adopted Local Plan (2006). This has meant the detailed appraisal provided at Appendix 8 has sought to give preference to sites that provide the best opportunity for integration with the existing main shopping areas in the Town Centre, as well as the potential for the consolidation and growth of the Primary Shopping Area/ Town Centre Shopping Area.

9.9 The table below provides a summary of the commentary and assessment of development potential contained in the appraisal at Appendix 8.

Plan Ref.	Site	Commentary	Potential
1	Chapel Street	■ High sequential ranking; ■ Allocated Site; ■ Existing mixed retail permission and development underway	■ Very good; ■ Potential catalyst to enhancement/ redevelopment of adjoining sites
2	Crown House and Bingo Club	■ High sequential ranking; ■ Edge of Primary Shopping Area; ■ Low density site coverage	■ Very good, subject to any protection of buildings; ■ Potential extension of Primary Shopping Area and Town Centre core; ■ Viability and land assembly issues ■ Potential part of Area Action Plan
3	Corporation Street	■ High sequential ranking, although segregated from Primary Shopping Area and Town Centre core; ■ Low density site coverage; ■ Suitable for existing uses	■ Medium; ■ Substantial measures required to integrate with Town Centre core
4	RBC Town Hall	■ High sequential ranking; ■ Important existing town centre use/function; ■ Separate from Primary Shopping Area and Town Centre core; ■ Possible extension of Town Centre	■ Good, subject to protection of buildings; ■ Potential for mixed use development, including a hotel and retail floorspace; ■ Land assembly issues less

Plan Ref.	Site	Commentary	Potential
		core if developed with Site 2; n Historic/architectural merit of buildings	significant; n Importance of retaining/replacing Civic Office uses
5	North Street Car Park	n High sequential ranking; n Close proximity to Primary Shopping Area and to Clock Towers shopping centre; n Under-used and low density; n Emerging proposals for international Rugby leisure attraction	n Very good- key opportunity; n Potential for retail-led mixed use development including major leisure; n Opportunity to enhance attractiveness of Town Centre; n Potential part of Area Action Plan
6	Little Church Street	n High sequential ranking; n Close proximity to Town Centre core and Primary Shopping Area; n Within Conservation Area and adjacent to listed church; n Constrained site including number of mature trees	n Limited potential for significant retail and/or leisure development; n Possible opportunity for small scale units on part of site
7	Gas Street Car Park	n High sequential ranking; n Within the Town Centre Shopping Area, close to Conservation Area; n Relatively low grade/order surrounding uses	n Limited potential for significant retail and/or leisure development; n Medium potential for small scale ground floor units for retail or food and drink uses
8	Castle Street Car Park	n High sequential ranking; n Edge of Town Centre Shopping Area; n Relatively peripheral location, with no direct links to main shopping streets; n Existing extant permission for hotel-led redevelopment	n Limited potential for significant retail development; n Good potential for medium sized hotel development
9	Clifton Road/Railway Terrace	n High sequential ranking; n Located within Town Centre Shopping Area; n Relatively peripheral location containing existing and former night-time uses and mix of secondary comparison and convenience retail units and take away outlets;	n Limited potential for significant retail development given peripheral location; n Medium potential for small scale retail /food and drink ground floor units as part of mixed use on Railway Terrace part of site to link with emerging proposals on Sites 7 and 8
10	Albert Street	n High sequential ranking; n Relatively peripheral location, surrounded by transitional uses; n Potentially important corner site on main route to Railway Station; n Occupied by existing commercial and offices uses with strong tenants	n Limited to medium potential, subject to issues of land assembly and viability; n Opportunity to re-address important corner block on edge of Town Centre; n Potential for mixed use development with ground floor retail/food and drink units; n Any redevelopment would need to include attractor/public square to

Plan Ref.	Site	Commentary	Potential
			encourage footfall

9.10 The appraisal contained at Appendix 8, as summarised above, indicates that there are two prime sites within the Town Centre that offer the most significant potential for redevelopment, as well as the extension and consolidation of the Centre's Primary Shopping Area.

9.11 These two prime sites are the Crown House and Bingo Club site (Plan Ref. 2) and the North Street Car Park site (Plan Ref. 5). Both of these sites provide significant potential to accommodate major retail-led mixed use redevelopment in highly sustainable and sequential preferable locations on the edges of the existing Primary Shopping Area.

9.12 In the case of the Crown House and Bingo Club site, further testing of the viability and land assembly issues will be required in terms of promoting the opportunity for redevelopment. The site contains existing established uses, and the Crown House building provides one of the Centre's main office buildings with longstanding tenants. However, if redevelopment could be realised then the site could provide for the "rounding off" of the existing Town Centre core (as currently bounded by Evreux Way) as well as providing links with the emerging Chapel Street redevelopment and any future redevelopment potential of the Town Hall site. Any mixed use proposals for the redevelopment of the site could include the re-provision of a modern bingo hall/ leisure facility and high quality new office floorspace to replace the existing Crown House.

9.13 The North Street Car Park site has recently been identified as a potential location for the development of a major leisure based attraction on the theme of Rugby Football as an international sport. It is understood that there is emerging informal support for such proposals, and a recent study has been commissioned by Rugby Borough Council to test viability and feasibility of developing a 'World of Rugby' facility within the Town Centre.

9.14 The appraisal contained at Appendix 8 indicates that the North Street Car Park site could accommodate such a leisure facility as part of a retail-led mixed use redevelopment. The appraisal identifies that the site represents a key opportunity for the provision of new retail and leisure facilities to enhance the attractiveness of the Town Centre, given the key linkages with the Clock Towers shopping centre and the main shopping streets within the Centre.

Potential Area Action Plan

9.15 There could be considerable merit in seeking to produce a formal Area Action Plan (AAP) as a Supplementary Planning Document to the emerging Rugby Local Development Framework for the area covering the Chapel Street site; the Clock Towers shopping centre: and the two prime sites (Plan Refs. 2 and 5) identified by the appraisal of potential town centre opportunities contained in this Study.

9.16 The preparation of an AAP for this part of the Town Centre should involve consultation with key stakeholders, local residents, visitors, and other users of the Centre. It would also form the basis for preparing strategic proposals and policies that will deliver an integrated and comprehensive approach to the regeneration of these key sites. The AAP would also provide the scope for indentifying links between emerging and future proposals with the aim of ensuring highest levels of accessibility and an enhanced public environment within the Centre. For example, the AAP could incorporate and reflect any measures for public realm works and downgrading of North Street to improve pedestrian connections between the Clock Towers shopping centre and the North Street Car Park site.

9.17 In addition, the AAP could be used to form improved links with the Town Centre's main shopping areas and potential future redevelopment opportunities, such as the Town Hall site. It could also identify potential opportunities for the enhancement/refurbishment of land and buildings adjoining identified development opportunity sites (Plan Refs. 1, 2, and 5) including the Clock Towers Shopping Centre.

9.18 Whilst not identified by this Study as a potential opportunity site within the Town Centre, the Clock Towers Shopping Centre may the subject of further attention over time, in terms of any potential investment in refurbishment/redevelopment, once the Chapel Street redevelopment and any other emerging schemes within the Town Centre become fully established. In that respect, the Clock Towers Shopping Centre is placed centrally between the key redevelopment opportunities described above and therefore could potentially benefit from increased linkages and levels of pedestrian through movement.

Potential Sites in Peripheral/Secondary Locations

9.19 The sites at Clifton Road/Railway Terrace (Plan Ref. 9) and at Albert Street (Plan Ref. 10) provide limited to medium potential for redevelopment incorporating smaller scale retail and leisure uses at ground floor level, potentially as part of mixed use proposals.

9.20 Both of these sites provide the opportunity to create increased commercial activity and attractiveness around the periphery of the existing designated Town Centre and outside of the existing Primary Shopping Area.

9.21 In the case of the site at Clifton Road/Railway Terrace, there is potential to link/integrate any new mixed use redevelopment proposals on the western part of the site with the emerging residential and hotel-led proposals on the adjoining car parking sites (Plan Refs. 7 and 8).

9.22 The site at Albert Street provides the scope to re-address this potentially important corner block on the edge of the existing Town Centre. It is considered that any proposed redevelopment should include a suitable means of attracting town centre users/visitors to the site, for example by creating a new and high quality multi-event public square potentially fronted by ground floor commercial (retail/ food and drink) units. Any viable proposals for the redevelopment of the Albert Street site should aim to encourage increased pedestrian movements to and from the Railway Station, particularly if combined with enhanced off-site pedestrian linkages.

10. Summary: Conclusions

10.1 This section of the Study report provides a summary of the main conclusions of this Retail and Leisure Study for Rugby Borough Council. The identified conclusions, and the key recommendations contained in the following section, are intended to form the basis for the preparation of the Council's emerging Core Strategy and Local Development Framework documents, particularly in respect of the Council's strategy, proposals, and policies relating to retail and leisure uses and the future growth, vitality, and viability of Rugby Town Centre.

10.2 This section is broken down into separate headings covering the main issues covered in each of the preceding sections of the Study report. The conclusions from this Study have been used as the primary basis for the formulation of the key recommendations identified in the following section, which are also then further addressed as part of the final section of this Study report in respect of future review and monitoring by the Council.

Results of Shopper Surveys

10.3 A total of 1001 household telephone interviews were carried out for this Study covering the agreed Rugby Catchment Area and surrounding areas between 30 November and 5 December 2007.

10.4 The results of the Survey showed a range of convenience stores available within and around the Rugby Catchment Area, although stores in Rugby still represent the largest volume of responses for main food shopping as would be expected. The Sainsburys store at Bilton Fields and the Tesco store on Leicester Road account for 30.4% of response for main food shopping across the zones. Almost half of respondents stated that they do not link trips when food shopping and 86.2% stated that they use their cars for food shopping trips.

10.5 The results of the Survey show that Rugby (town centre and retail parks) is the preferred location for clothes and shoe shopping, as well as for other comparison goods, particularly for residents within the primary catchment area. There is however evidence of expenditure leakage on comparison goods to nearby centres (Coventry, Leamington Spa, and Northampton). Of the 64.1% of respondents who undertook DIY shopping within past six months, 19.7% identified Rugby as their primary destination. A high percentage (80.6%) of respondents use a car for their non-food shopping trips.

10.6 The results of the survey include trends in 'special forms of trading' (internet, catalogue, and TV) and show that the highest percentage of respondents using this type of shopping relates to expenditure on personal and luxury goods (e.g. books, jewellery, cosmetics, recorded media, and sports equipment).

Results of Street Surveys

10.7 A total of 210 street surveys were undertaken to inform the assessment of shopping patterns and preferences contained in this Study. The surveys were undertaken on 30 November and 1 December 2007.

10.8 The results show that just under half of the respondents travelled to the Town Centre by car, which represents the most popular mode of travel to the Centre. Over one quarter of respondents travelled by bus.

10.9 The majority of visitors to the Town Centre do so for non-food shopping, and a significant percentage of respondents (48.6%) indicated that they had chosen the Town Centre because of proximity to their homes in addition to 'ease and convenience'. The range of shops and quality of environment were infrequently cited as reasons. It is significant to note that feedback comments overall indicated a poor/very poor view from residents towards the range and diversity of shopping and other town centre facilities.

10.10 Increased convenience shopping facilities within the Town Centre was the most frequently given response to the request for suggested improvements from respondents, closely followed by range of non-food shopping. The Chapel Street redevelopment will provide a significant benefit in terms of providing such improvements at least in the short term. Increased presence of independent units would make the Town Centre more attractive according to almost a quarter of respondents (the most popular response).

Health of Rugby Town Centre

10.11 The Overview of the Health of Centres section of this Study provides a detailed review of various health check indicators in accordance with PPS 6 requirements. The section deals principally with the health of Rugby Town Centre, although consideration is also given towards other nearby competing centres.

10.12 Overall the overview assessment of Rugby Town Centre is that is in reasonably good health for the size of centre, its location, the extent of its catchment, and the proximity of surrounding larger centres in the wider sub-region. The Centre provides a good range of comparison and convenience retailing (comparable to the national average) as well as a reasonable level of provision of other town centre uses and facilities that are appropriate for Rugby's attractiveness to tourist visitors.

10.13 Rugby Town Centre, which is ranked by Venuescore as a Sub-Regional Centre, accommodates 55% of the top 20 national multiple retailers, although major department store operators such as Debenhams, and BHS are presently absent.

10.14 The level of vacancies within the Town Centre at December 2007 (9%) is below the national average, which represents a key indicator of the Town Centre's health.

10.15 The Chapel Street redevelopment should provide for the replacement of former convenience retail floorspace within the centre lost as a result of the longstanding proposal. The emerging scheme should also address the previously outstanding need for additional convenience shopping provision within the Centre.

10.16 The concentration of independent and more specialist retailers in the area around Regent Street provides a strong and positive element of the overall attractiveness of the Town Centre and also the level of vitality and diversity of available shopping facilities. This represents a strength of Rugby that should be developed further in response to the results of on street surveys.

Assessment of the Need for Further Retail Floorspace

10.17 The assessment of retail floorspace and existing facilities undertaken for this Study shows that Rugby benefits from having an extensive range of existing out-of-centre facilities for comparison and convenience shopping. In particular, Rugby is notable for the extent of existing retail park provision to the north of the town at Elliot's Field retail park, and Junction One Retail and Leisure Park which contain a significant range of retail units including open A1 units occupied by tenants typically located within town centres.

10.18 The history of permissions and out-of-centre retail development in Rugby shows that in the past there has been a relatively relaxed approach in planning terms towards the risk of competition with and impact on the town centre. This approach will have taken account of the benefits provided by the existing out-of-centre facilities in terms of providing a range and diversity of shopping to meet consumer needs and preferences.

10.19 The focus for the future growth of retail floorspace within Rugby should be on the potential for redevelopment of key opportunity sites within the Town Centre including extension of the Primary Shopping Area.

10.20 The results of the retail capacity assessment undertaken as part of this Study report indicate that there is a theoretical capacity for 9,233 sq.m of new comparison retail floorspace within Rugby Town Centre by 2020, and 20,100 sq.m by 2026.

10.21 In respect of convenience retail, this Study report concludes that the Chapel Street redevelopment anchored by Asda will satisfy the quantitative and qualitative need for convenience shopping within Rugby Town Centre for the period up to 2026.

Leisure Market Commentary

10.22 A detailed review of leisure market trends and forecasts for national, regional and local levels, are contained in Section 7. The growth in expenditure on leisure and recreational pursuits has seen an increase nationally of over 16.5% over the last 4 years, and the leisure market is forecasted to show a steady year on year growth up to 2011.

10.23 On average, on an annual basis Rugby attracts in the order of 3.5 million visitors. Of these the vast majority are understood to stay with friends and relatives, which may partly reflect the limited presence or attractiveness of existing hotel and guest accommodation with the Town Centre. It is interesting to note that one fifth of overseas visitors cited Rugby Football as the reason they chose to visit the town.

10.24 Section 7 provides an assessment of market demand in key sectors of relevance to this study identifying growth particularly in food and beverage, health & fitness and gambling.

Assessment of the Need for Further Leisure Floorspace

10.25 Section 8 of this Study provides the main findings on the need for additional leisure floorspace within Rugby Town Centre to support the overall vitality and viability of the Centre, the promotion of a diversity of uses to encourage the attractiveness of the Centre overall, particularly outside normal shopping hours, as well as providing the potential for linked trips and overall enhancement of commercial and leisure activity within the Centre.

10.26 Unlike in the case of the assessment of expenditure capacity and quantitative need for additional retail floorspace, the assessment of need for leisure floorspace is an evolving concept and there are no established or formally accepted methodologies for identification of leisure need in quantitative terms. The assessment contained in this Study is therefore based on recent and contemporary trends in the leisure market, an understanding of current supply and commitments in Rugby, and an expert forecast of future demand.

10.27 The main conclusion of the leisure assessment element of this Study is that there is a need for a good quality hotel within the Town Centre (star rating 3 or 4, or possibly in the form of a boutique hotel). Such a proposal would complement and support the emerging proposals for a major leisure attraction based on Rugby Football as an international sport.

10.28 The existing planning permission and emerging proposals for a Ramada Hotel on the site of the Castle Street Car Park site is likely to satisfy immediate demand for a hotel within the short term, while there should be scope to attract a further branded hotel within the Town Centre over the medium term, particularly if there is an increased provision of other high quality tourist or leisure attractions within the town.

10.29 At the present time it would appear that there are few links for example between visitors/parents to Rugby School and the rest of theTown Centre. It is considered that a strategy of encouraging good quality serviced accommodation could enable the town to penetrate this market.

10.30 The assessment of leisure need across other sectors indicates that there is currently an adequate provision of food and beverage, health and fitness, bowling, cinema, casinos/gaming and performing arts within the Town Centre. However, it is recommended that measures are used to encourage an increased quality and co-ordination of leisure facilities and attractions within the Town Centre.

10.31 The food and beverage offer is a 'mixed bag' with reasonable quality restaurants at one end of the Town Centre and poor quality pubs at the other end. Establishing and promoting a permanent restaurant quarter will strengthen the restaurant sector and enable it to present a cohesive offer to the market place. This concept has been 'tested' previously but would benefit from establishing a permanent presence as a restaurant sector. Although the quality of pubs varies significantly, a number have heritage roots and offer a quality food and drink service. In common with the restaurant sector, the need to link the pubs together through for example a 'pub trail' will provide a more co-ordinated approach to marketing and potentially encourage increased visitor spend.

10.32 Finally, there is a clear need to link the retail and leisure offer in order to develop the evening economy. This will enable the town centre to retain vibrancy after 5:00 pm, potentially attracting business between the shoulder time of 5-7 pm and attracting residents and visitors into the town centre in the later evening. In particular, this needs to encompass for example food and beverage, the performing arts, cinema and retail. Involvement of the industry in developing a strategic approach to linking elements of their services will be crucial.

Assessment of Potential Town Centre Sites

10.33 Section 9 of this Study report provides an appraisal of potential sites for redevelopment within the Town Centre that could accommodate additional new retail and leisure floorspace. The appraisal contained in Section 9 is supported by a more detailed schedule and appraisal of potential Town Centre sites at Appendix 8.

10.34 In summary, the appraisal identifies two prime sites within the Town Centre that could provide the potential for significant new multi-storey retail-led mixed use development incorporating major leisure facilities and the potential for other suitable town centre uses such as offices. These two prime sites are at the North Street Car Park site, which is considered to provide a key opportunity in terms of extension of the Primary Shopping

Area in a central and well connected location, and the Crown House and Bingo Club site, which could provide the opportunity for “rounding off” the existing Town Centre core bounded by Evreux Way. The Crown House and Bingo Club site would also provide the potential for links or integration with any potential future redevelopment of the Town Hall site.

10.35 There would be considerable merit in producing an Area Action Plan for the area covering the emerging Chapel Street site and the potential for links and integration with the other prime redevelopment opportunities identified by the appraisal of sites contained in this Study. The preparation of an Area Action Plan would provide the basis for consultation with key stakeholders and local interested parties and would also provide the scope to inform and influence a comprehensive and co-ordinated approach to the regeneration and redevelopment of this part of the Town Centre, incorporating any other emerging public realm of traffic management strategies.

10.36 The appraisal of potential sites included in this Study covers ten sites across the Town Centre and provides varying conclusions on their potential for redevelopment to provide significant new retail and leisure floorspace. In a number of cases there are already emerging proposals and commitments relating to these sites.

10.37 This Study does not provide any appraisal of sites located outside of the Town Centre on the basis that there should be an emphasis on firstly testing fully the potential to accommodate future retail and leisure growth within the Town Centre in accordance with established national planning guidance as contained in PPS 6, before considering the potential to accommodate any identified need for additional retail or leisure floorspace in less sequentially favourable locations.

11. Summary: Key Recommendations

11.1 This section of the Study report sets out the main key recommendations arising from the assessment of retail and leisure issues, supply, and levels of need within Rugby. The recommendations have been formed taking account of the key points and conclusions from the preceding sections of this Study report and are intended to help provide a framework for Rugby Borough Council and their town centre partners and stakeholders to take forward a planning strategy for the growth and future vitality and viability of Rugby Town Centre.

11.2 Section 12 of this Study report provides specific proposals for initiatives that could be used for protecting and enhancing the health and prosperity of Rugby Town Centre over future years. It is expected that the recommendations set out below will be used to inform the preparation of Rugby's Local Development Framework and the Council's core planning policies in relation to proposals for retail and leisure development within Rugby Borough.

11.3 The final section of this Study report contains advice on the future review and monitoring of the recommendations of this Study and includes performance criteria for the assessment of progress on their delivery.

Key Recommendations

- Develop a clear and robust framework of policies within the emerging Local Development Framework Core Strategy, and any other Development Plan Documents as appropriate, that place emphasis on the importance of promoting retail and leisure growth within the core of the Town Centre in advance of the consideration of potential edge-of-centre or out-of-centre site opportunities;
- As far as reasonable within the context of national guidance contained in current PPS 6 (2005), and any subsequent revisions, seek to develop planning policies as part of the Local Development Framework that promote the growth of retail and leisure floorspace within the Town Centre; and that in addition place strict requirements on developers to demonstrate compliance with established tests of need and, importantly, full and thorough testing of Core Town Centre opportunities prior to granting approval for significant edge-of-centre or out-of-centre proposals for retail and/or leisure development;
- Develop and adopt as a Development Plan Document or Supplementary Planning Document, a new Town Centre Strategy to build upon the existing attractive characteristics of the Town Centre, including the presence and concentration of a range of independent retailers, and to establish a baseline strategy for protecting and enhancing the health and vitality of the Town Centre and the potential to accommodate significant additional growth. This document should be prepared jointly with the Town Centre Company and other key town centre stakeholders and should incorporate and develop measures contained in existing key documents such as the Town Centre 20:20 Vision;
- As part of the above, take forward a co-ordinated approach with Town Centre stakeholders and key consultees, towards promoting a range of initiatives that protect the health and vitality of Rugby Town Centre, and importantly ensure that it achieves a level of distinctiveness that adds to its level of attractiveness. Section 12 of this Study report sets out a range of suggested initiatives to be taken forward;
- Seek to allocate sufficient land, or otherwise develop a suitable planning policy framework, for the delivery of significant additional comparison and

convenience goods retail floorspace within Rugby, with emphasis on the Town Centre first, by 2026, in accordance with the levels of need identified by this Study report;

- Seek to promote, through allocation or suitable planning policy framework, the provision of a new good quality hotel within the town centre (of 3 or 4 star rating, or possibly of boutique style). This should include the preparation of a market appraisal to confirm future levels of provision and a targeted approach to the sector, with the aim of generating hotel operator interest;
- Promote the establishment of a permanent 'quarter' for high quality food and beverage uses;
- Develop a means for encouraging increased linkages between shopping and evening economy activities including more flexible planning control to allow extended shopping hours that provide for prolonged visits to the Town Centre linked with evening eating and drinking, theatre, or performing arts and cultural facilities. This should include the preparation of an evening economy strategy which could provide for such measures as the creation of a 'pub trail' and marketing/promotional material and websites;
- Develop an Area Action Plan (AAP), as a Supplementary Planning Document, for the area covering the emerging Chapel Street redevelopment, the Clock Towers Shopping Centre, and the two prime opportunities for multi-storey, mixed use, retail-led redevelopment identified by this Study at the Crown House and Bingo Club site and the North Street Car Park Site. This AAP should be used to inform a comprehensive and co-ordinated approach to the regeneration of this part of the Town Centre, including the promotion of clear and legible links between any proposals for redevelopment, and the incorporation of other committed or emerging proposals for public realm or accessibility enhancements, for example along North Street;
- Undertake more detailed testing and investigation of the potential to bring forward large scale mixed use redevelopment of the prime sites identified by this Study, with particular regard to issues of land assembly, viability, and scope for significant additional retail and/or leisure floorspace;
- Investigate appropriate land assembly and development delivery options for the promotion of the opportunity sites identified by this Study as necessary for the accommodation of the level of additional retail and leisure floorspace growth identified by this Study;
- Undertake a detailed review, as part of the preparation of the emerging Local Development Framework, of the extent and boundaries of the Town Centre Shopping Area identified by the adopted Rugby Local Plan (2006). This should include consideration of the potential to identify more peripheral edge-of-centre site opportunities for redevelopment, where such opportunities would serve to provide for the beneficial extension of activity and pedestrian footfall beyond the existing established Town Centre core. For example, the basis for such an extension could include encouragement of increased pedestrian trips between the core and the Railway Station;
- Undertake a regular Borough-wide and Council-led review of retail, leisure, and town centre expenditure capacity and levels of need to inform the future allocation and promotion of sites and growth for such uses, and to ensure the continued reliability and validity of the Council's evidence base for the determination of planning applications.

12. Future Vitality of Rugby Town Centre

12.1 The vitality of Rugby Town Centre in a land use context is a direct product of the mix, function and form of the buildings but importantly the spaces between the buildings.

12.2 Vitality is dependent upon diversity and an appropriate mix of uses that allow for a concentration of activity encompassing a vibrant environment, the activity within which should importantly extend beyond normal shopping hours. It should be supported by an access network that allows for appropriate penetration into, around, and within the central area to protect the existing health of the centre and to encourage increased vitality. To create vitality and vibrancy, places and spaces within the Town Centre need to be attractive and well used by pedestrians.

12.3 There is a balance to be struck within Rugby Town Centre to ensure that appropriate opportunities to support and increase vitality are not lost to inappropriate development, whilst ensuring that the best of the historic fabric and civic character of the town is also not adversely affected. In this context the component elements that make Rugby Town Centre attractive and distinctive need to defined, understood and enhanced.

12.4 The continued investment in the improvement and enhancement of the streetscape and public realm when coupled with traffic management and pedestrian circulation flows can bring new life to the centre creating the right mix of places and spaces to be populated by people and activity.

12.5 The Rugby 20:20 Vision is embarking on a number of strategies to map out a longer term strategy for the Town Centre. It includes many commendable themes – some of which are further rehearsed in this section in terms of identifying ways in which the vitality of the Town Centre can be further enhanced.

12.6 The proposals of the 20:20 Vision require more detail to help delivery and this in part can be assisted by greater weight being given through Development Plan Documents and Supplementary Planning Documents to help set the direction and provide focus to the delivery of measurable outputs. Above all co-ordination of key stakeholders, interested parites/ consultees, policy makers and decision makers in the process is critical.

12.7 This Study has primarily been focussed on assessing the need for significant additional retail and leisure provision within Rugby Borough to inform the preparation of the emerging Local Development Framework Core Strategy, and other associated Development Plan Documents and potential Supplementary Planning Documents, that will provide the future planning policy framework for the determination of retail and leisure proposals.

12.8 Section 5 included a list of indicators, established by PPS 6 (2005), to measure and assess the vitality and vitality of town centres, which are generally used for monitoring the overall health of Centres over time. It is recommended that these indicators be regularly monitored and assessed to assist in shaping future strategies for the Town Centre and monitoring the impacts arising from emerging development schemes and other changes within the Centre over coming years.

12.9 There are already a number of targeted measures used by the Borough Council and its Town Centre Management partners to assist with town centre improvements including the Business Improvement District and the work of the Rugby Town Centre Company, and Warwickshire County

Council. Again it is important that all these stakeholders combine through joint working strategies to ensure optimum outputs.

12.10 Set out below are a number of proposed achievable initiatives and outputs to help consolidate and protect the future vitality of Rugby Town Centre.

- Identify clearly what is “Uniquely Rugby”.
- Once defined begin to trade off existing assets.
- Introduce more town centre living – Rugby already scores highly amongst shoppers who walk to the town centre benefitting as it does from immediately accessible residential areas adjacent to the town centre. More could be done to shape a strategy to identify sites for residential development to further assist the growth of residents in the town thereby adding to the local economy and assisting in supporting a more vibrant evening economy.
- Car Parking - ensure that there is a suitable amount of accessible, safe and reasonably priced car parking. Almost half of visitors to Rugby arrive by car and a high proportion were dissatisfied with car parking charges. While balancing important sustainability objectives, a car parking strategy to maximise length of stay aimed at shoppers and visitors could include opportunities to develop loyalty schemes where shoppers can obtain discounts on car parking when making purchases in the town centre.
- Accessibility – ensure that there is a developed focus for modes of public transport, cycling, bus rail and taxi – develop the links between these arrival points and departure points relevant to the town centre with clearly defined routes, information, signage and ease of access.
- Develop the Markets – a market town with different offer on days of the week / weekends or certain times of the year - Farmers Market, Organic Produce Market, Antiques Market, Craft Fairs
- Market Rugby to local residents and to the wider population built on a manageable series of themes, events, branding and advertising campaigns. Rugby should seek to capitalise on traditional open air seasonal themes with appropriate level of support to differentiate it from other competing town or city centres.
- Connectivity / Legibility - develop a defined pedestrian flow around different parts of the town (using initiatives including a ‘Pub Trail’) to provide and encourage access to all areas of the Town Centre thereby increasing pedestrian footfall, investment, and branding opportunities.
- Public realm enhancements – continue with a theme of improvements and ensure new developments are well planned and contribute to the enhancement of the wider public environment and integration of existing shopping areas with emerging schemes and opportunity sites. Identify and promote opportunities for civic space or performance spaces, around which people can meet, watch, eat or drink. Also address the “easy wins” which the public pick up on – i.e. the condition of public toilets, bus shelters, litter etc.
- Improve the retail offer by working more closely with local / national agents to drive opportunities that are available in Rugby to the retailers and attempt to explore whether there could be inducements to attract certain retailers.
- Profit rent / lease pilot schemes – working with the Council’s own property portfolio or shopping centre mangers or landowners to develop more creative ways to attract business/ operators and develop a seed bed for retail investment particularly the independent retail sector.
- Invest and develop further the leisure offer from small scale café and restaurant offer to more major development proposals such as the ‘World of

Rugby' proposals. It was evident that only 0.5% of survey respondents cited leisure as reason for visiting Rugby Town Centre.

- Al-Fresco opportunities – develop the café culture to ensure opportunities to capitalise on an improving environment. Use initiatives to create the right conditions to maximise outdoor dining / eating – linked to public realm improvements
- Policy drivers – ensure that the opportunities which are tied to a longer term vision are supported in Local Development Framework policies or associated Supplementary Planning Documents. The delivery of a Town Centre Strategy and potential Area Action Area Plan could assist in setting the strategy, protecting and enhancing the town centre whilst providing a clear direction to future inward investors. Ensure that policy is clear about what is to be delivered and how.
- Ensure the planning policy framework is balanced to ensure that where appropriate the local authority can secure S106 payments from new town centre or out of centre proposals and focus such monies directly into clearly defined proposals supported by policy that benefit the delivery of the overall Town Centre Strategy. The Council may wish to develop this further through establishing fixed formulae for public realm contributions or a potential Community Infrastructure Levy. Such propositions should be supported by a clear remit as to what is required and why and how it will be delivered.

13. Future Review and Monitoring

13.1 Taking account of the Key Recommendations contained in Section 11 of this Study report, the table below provides a suggested approach to the evaluation of performance against each of the recommendations, and sets out advice on periods for review and basis for future monitoring.

Recommendation	Tasks and Evaluation	Review and Monitoring
Clear and Robust Policy Framework	Prepare clear and robust Town Centre policies as part of emerging Local Development Framework and other relevant DPD	Within LDF timescales set by Local Development Scheme ensure clear and robust policies are adopted as part of Core Strategy; and seek to review as necessary within 3 years
Planning Policies for Promotion of Growth of Town Centre	Prepare clear and robust policies for the promotion of growth of the Town Centre as part of emerging Local Development Framework and other relevant DPD and SPD	Within LDF timescales set by Local Development Scheme ensure clear and robust policies are adopted as part of Core Strategy; and seek to review as necessary within 3 years
New Town Centre Strategy	Prepare a clear and co-ordinated Town Centre strategy as a DPD or SPD through consultation with Town Centre Company and other key town centre stakeholders and consultees	To be prepared alongside the emerging LDF process and be published alongside the adoption of the Core Strategy; and be reviewed at least every 2 years thereafter
Take Forward Initiatives to Promote Town Centre Vitality	Through co-ordination with the Town Centre Company and other key town centre stakeholders and consultees develop approach for promotion of health and distinctiveness of Town Centre	Within 1 year of the date of this Study to have agreed the programme for the implementation of at least 5 Town Centre initiatives (taking account of suggested initiatives in this Study); to include an agreed monitoring framework and means of evaluation
Develop Suitable Planning Policy Framework for Significant Increased Comparison Goods Retail Floorspace by 2026	As part of the preparation of the Local Development Framework Core Strategy, and/or through the preparation of suitable DPD and SPD (including a Town Centre Strategy and Area Action Plan) create a robust planning policy framework for the delivery of significant additional comparison goods floorspace within Rugby with emphasis on the Town Centre first	Within 1 year of the date of the adoption of the LDF Core Strategy ensure that either sufficient land has been allocated to meet the identified need for comparison floorspace over the LDF period or otherwise that a suitable and robust planning policy framework is in place for the promotion of sufficient floorspace to meet the identified need
Promote the Development of a Good Quality Town Centre Hotel	As part of the preparation of the Local Development Framework Core Strategy, and/or through the preparation of suitable DPD and SPD (including a Town Centre Strategy and Area Action Plan) create a robust planning policy framework that promotes the development of a good quality hotel within the Town Centre- this should include commissioning of a market appraisal and development strategy to actively seek operator interest	By the date of the adoption of the LDF Core Strategy ensure that a market appraisal and development strategy has been undertaken and that a suitable and robust planning policy framework is in place for the promotion of opportunities for the development of a good quality hotel, with emphasis on the town centre first

Promote the Establishment of a High Quality Food and Beverage Quarter	Through the preparation of a Town Centre Strategy, involving co-ordination with the Town Centre Company and other key town centre stakeholders and consultees including restaurant owners, identify and develop an action plan for the establishment and promotion of a high quality branded food and beverage quarter	As part of publishing a new Town Centre Strategy ensure that an action plan for promoting and marketing an established high quality food and beverage quarter is in place by the date of the adoption of the LDF Core Strategy
Increase Linkages between Shopping and Evening Economy	Through the preparation of a Town Centre Strategy, involving co-ordination with the Town Centre Company and other key town centre stakeholders and consultees, commission and develop an evening economy strategy for promoting increased linkages between shopping and the evening economy, including branding and extended hours of opening- to include identification of 'pub trail'	As part of publishing a new Town Centre Strategy ensure that an action plan for promoting increased linkages between shopping and the evening economy is in place by the date of the adoption of the Core Strategy
Develop an Area Action Plan (AAP) for Prime Opportunity Sites within Town Centre	Alongside the preparation of the Local Development Framework Core Strategy, bring forward the preparation on an AAP to promote the co-ordinated regeneration of key prime sites within the Town Centre	To be prepared alongside the emerging LDF process and be published within 1 year of the adoption of the Core Strategy; and be reviewed at least every 2 years thereafter
Detailed Testing of Site Opportunities	Further detailed investigations of land availability, viability, and market interest in identified opportunity sites to be undertaken alongside the preparation of the Local Development Framework Core Strategy and preparation of an AAP for identified prime sites	To be competed in advance of public consultation of a draft AAP and in advance of the adoption of the LDF Core Strategy
Investigation of Land Assembly and Development Delivery Options	Further detailed assessment of the options and opportunities for the delivery of major mixed use redevelopment of identified prime sites, including consideration of compulsory purchase and/or development partnership options	To be progressed in advance of the preparation of a final AAP for adoption and within 1 year of the adoption of the LDF Core Strategy
Review of Extent of Town Centre Shopping Area	As part of the preparation of the Local Development Framework Core Strategy, and/or through the preparation of suitable DPD and SPD (including a Town Centre Strategy) undertake a detailed review of the extent of the Town Centre Shopping Area and opportunities for edge of centre redevelopment	To be completed by the date of the adoption of the LDF Core Strategy

Review of Borough-wide Retail and Leisure Study	To ensure that the allocation of sites and/or preparation of a robust planning policy framework for promoting the development of new significant retail and leisure floorspace within Rugby remain based on valid and up-to-date assumptions relating to expenditure capacity and market trends, it is important to undertake regular reviews of the information contained in this Retail and Leisure Study	Reviews of the Retail and Leisure Study to be undertaken every 2-3 years

Drivers Jonas and Pan Leisure

July 2008