



Nathaniel Lichfield
& Partners

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**Coventry City Wide Shopping and
Centres Study**

2014 Update

Coventry City Council
11 December 2014

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Executive Summary

This City Wide Shopping and Centres Study has been prepared by Nathaniel Lichfield & Partners (NLP) on behalf of Coventry City Council. It updated the previous study prepared in 2006. It is intended to form part of the evidence base for the emerging development plan policies.

The study provides a quantitative and qualitative analysis of the existing retail and leisure facilities across the City Borough, and includes an assessment of the need for new retail, leisure and other main town centre uses. The key findings of the study are set out below.

Overview of the Shopping Hierarchy

The shopping hierarchy in Coventry has four tiers of centres, with the city centre at the top of the hierarchy, supported by 3 major district centre, 8 district centres and 22 local shopping centres and parades. Coventry also contains a number of retail warehouse parks and standalone retail warehouse units. The centres within Coventry compete with major shopping destinations outside the LPA including: Birmingham, Solihull, Leicester, Leamington Spa and Nuneaton.

Coventry City Centre is the main shopping destination and serves a wide catchment area. The major district centres and district centres provide a reasonable range of shops and facilities that serve the surrounding areas. Local centres and parades generally include shops of a more local nature, serving a small catchment.

Coventry City Centre is the main comparison shopping destination and the main focus for employment, leisure, entertainment and cultural activities. However investment within the city centre has not kept pace with development within district centres and retail parks.

National and local policy indicates that it is important for Coventry's centres to maintain and strengthen their role in the retail hierarchy. The smaller centres should continue to perform a more local function meeting day to day shopping and service needs.

Future Requirements

The retail capacity assessment identified floorspace requirements for the City within five year intervals up to 2031.

The short to medium term capacity figures up to 2021 suggest available convenience goods expenditure could in theory support an additional 7,046 sq.m net (10,066 sq.m gross), primarily located in the south west of the city. In the long term, expenditure at 2031 could support 11,487 sq.m net of sales floorspace (16,409 sq.m gross) in the City as a whole.

For comparison goods for the City as a whole, expenditure could support an additional 2,298 sq.m net (3,064 sq.m gross) by 2021, over and above proposed development at Coventry City Centre South. Expenditure at 2031 could support 29,934 sq.m net (39,779 sq.m gross). The proposed City Centre South Development assumed increase in comparison goods floorspace of 10,000 sq.m GIA - 7,500 sq.m net.

The assessment also identifies a requirement for 7,182 sq.m gross of food and drink (A3-A5) floorspace by 2021 and 12,639 sq.m gross by 2031.

The commercial leisure assessment concludes there is potential for Coventry City to increase its market share of cinema trips and could support an additional cinema. There could be scope for about two additional health and fitness clubs by 2031. There is no quantitative need for additional theatre facilities, tenpin bowling, bingo or nightclubs. However qualitative improvements should not be discouraged within designated centres;

Recommendations

The principles of the NPPF indicate that the Council's policy approach should aim to at least fully meet needs, so that the local economy is not constrained and potential investment is not diverted elsewhere or lost. The sequential approach suggests that designated town centres should be the first choice for retail, leisure and main town centre uses. All development should be appropriate in terms of scale and nature to the centre in which it is located.

The short to medium term (up to 2021) priority will be the implementation of the Coventry City South Development. In other centres and where relevant within the City Centre the reoccupation of vacant retail floorspace) should be encouraged.

In the longer term (after 2021) land west of Smithford Way and land north of Corporation Street could accommodate the residual need for further Class A1 to A5. Brade Drive has potential for small scale expansion in the short term but not to the detriment of the City Centre or other higher order centres.

Local planning authorities should set out a vision and strategy for the pattern and hierarchy of centres, including town, district and local centres within their area. The strategy for Coventry should set out how the role of different centres will contribute to the overall vision for their area.

Coventry City Centre should compete with other large regional/sub-regional centres, such as Birmingham and Leicester. The defined Major District Centres should continue to complement the City Centre by providing for bulk convenience food shopping and a range of comparison shopping facilities and other services. The District Centres should also continue to cater for bulk convenience shopping and services, but a more limited range of comparison shopping. Below the district centres, designated local shopping centres and parades should continue to serve small localised catchment areas, providing coverage across the City.

The NPPF does not require development to be appropriate in terms of scale and the catchment area the centre serves. Development within or on the edge of centres does not have to be consistent in terms of scale and nature with the character and role of the nearest centre.

The distinction between town, district and local centres is no longer important when applying the sequential approach. The designation of centre boundaries and primary shopping areas within these boundaries are more important issues, as they define whether sites are within centre, edge-of-centre or out-of-centre.

Future development plan policies in Coventry should continue to clearly define which centres are district or local centres and identity the boundaries of centres.

Arena Park Major District Centre is much larger than the other Major District and District Centres in terms of retail floorspace. Ball Hill Major District Centre is smaller than Arena Park and Cannon Park, and is not anchored by a large food superstore. Ball Hill's catchment area is not as extensive as the other Major District Centres. Ball Hill is not dissimilar in character to some of the larger District Centres and could be re-classified. Brandon Road (Warwickshire Shopping Park) has the potential to become a Major District Centre when it is fully occupied.

The future designation of Brade Drive as a District Centre should be reconsidered if proposals do not emerge to enable it to function as a district centre, i.e. a better range of facilities including non-retail services.

1.0

Introduction

1.1

Coventry City Council commissioned a City Wide Shopping and Centres Study in 2005, prepared by Nathaniel Lichfield & Partners (NLP) and published in 2006. This study was partially updated in 2008. NLP has been commissioned by Coventry City to prepare a comprehensive update of the 2006 Study.

1.2

The key objective of the City Wide Shopping and Centres Study Update is to provide a robust and up to date evidence base to inform the Council's work on emerging policy documents. The key objectives of the study are to:

- assess changes in circumstances and shopping patterns since the previous studies were undertaken, not least the effects of the recession and the availability of 2011 Census population data;
- assess the future need and (residual) capacity for retail floorspace distributed across the City for the period up to 2031;
- assess the potential implications of emerging and recently completed developments both within and outside the City, in terms of impact on centres and potential changes to shopping patterns;
- review the existing retail hierarchy and network of centres and advise whether any changes are required; and
- provide advice on future reviews of development plan policies, and provide recommendations on how each centre can develop its role.

1.3

Section 2 of this report describes the shopping hierarchy. Section 3 outlines retail trends and provides the updated retail capacity and need assessment, and Section 4 assesses the scope for commercial leisure uses and other town centre uses. Section 5 explores opportunities for accommodating growth. Section 6 provides the recommendations and conclusions.

2.0

The Shopping Hierarchy

Introduction

2.1

The National Planning Policy Framework (NPPF) indicates (paragraph 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Local Plans are expected to define a network and hierarchy of centres that is resilient to anticipated future economic changes.

2.2

The recently published Planning Practice Guidance (PPG) places emphasis on developing strategies for town centres that are appropriate and realistic to the role of centres in the hierarchy. Town centre strategies should be based on the current state of a centre and opportunities to meet development needs (in full). These town centre strategies should seek to support the town centre vitality and viability, and should assess if changes to the role and hierarchy of centres are appropriate. This section provides an overview of the shopping hierarchy in Coventry City and the surrounding sub-region.

Centres in Coventry and the Surrounding Area

2.3

Coventry City is bounded by Rugby, Warwick, Solihull, Nuneaton/Bedworth and North Warwickshire LPAs. The City Centre dominates the retail hierarchy, and is supported by major district centres, district centres and local shopping centres and parades. The retail hierarchy within Coventry City is as follows:

City Centre: Coventry City Centre

Major District Centres (3): Arena Park, Ball Hill and Cannon Park

District Centres (8): Bell Green, Brade Drive, Brandon Road, Daventry Road, Earlsdon, Foleshill, Jardine Crescent and Jubilee Crescent

2.4

The city centre and the district centres are supported by 22 local shopping centres and parades identified by the Council. These local centres and parades vary in size, range and quality but all perform a local shopping function with a mix of retail and service uses.

2.5

Coventry City also contains a number of retail warehouse parks, including Alvis Retail Park, Gallagher Retail Park and Central Six Retail Park, together with standalone retail warehouse units. The centres within Coventry City compete with major shopping destinations outside the LPA including: Birmingham, Solihull, Leicester, Leamington Spa and Nuneaton.

2.6

Venuescore ranks the UK's top 2,500 plus retail destinations including town centres, malls, retail warehouse parks and factory outlet centres. Each destination is given a weighted score for the number of multiple retailers

present, and the score attached to each retailer is weighted depending on their overall impact on shopping patterns.

2.7

Table 2.1 below shows the Venuescore for centres within and around Coventry City.

Table 2.1 Venuescore UK Shopping Index 2013

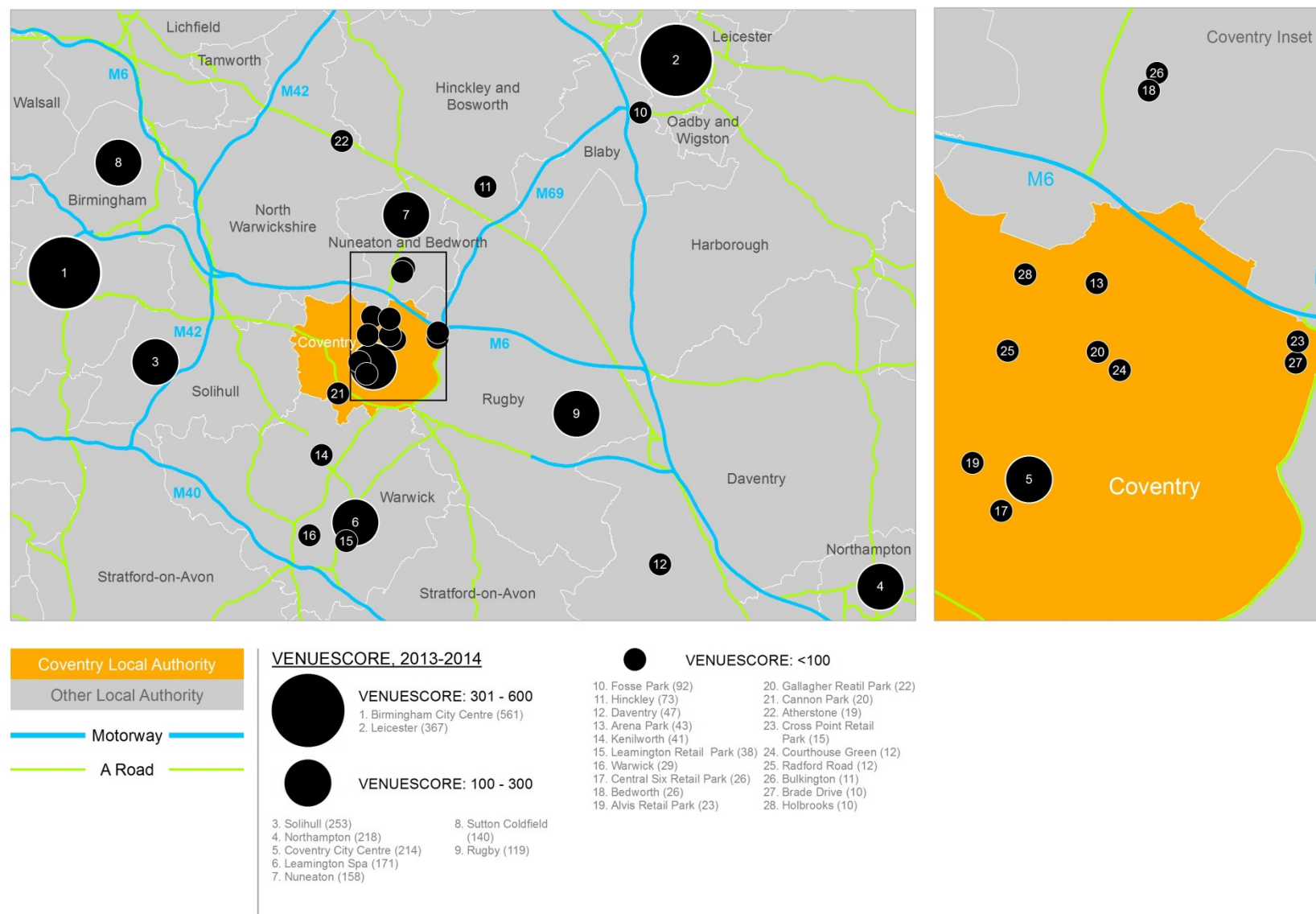
Centre	UK Rank	Venuescore
Birmingham City Centre	3	561
Leicester	17	367
Solihull	43	253
Northampton	56	218
Coventry City Centre	58	214
Leamington Spa	105	171
Nuneaton	125	158
Sutton Coldfield	152	140
Rugby	195	119
Fosse Park	250	92
Hinckley	343	73
Daventry	573	47
Arena Park	623	43
Kenilworth	655	41
Leamington Retail Park	697	38
Warwick	930	29
Central Six Retail Park	1,024	26
Bedworth	1,024	26
Alvis Retail Park	1,155	23
Gallagher Retail Park	1,204	22
Cannon Park	1,322	20
Atherstone	1,383	19
Cross Point Retail Park	1,684	15
Courthouse Green	2,061	12
Radford Road	2,061	12
Bulkington	2,216	11
Brade Drive	2,428	10
Holbrooks	2,428	10

Source: Venuescore, Javelin Group 2013

BOLD indicates shopping destinations located within Coventry City

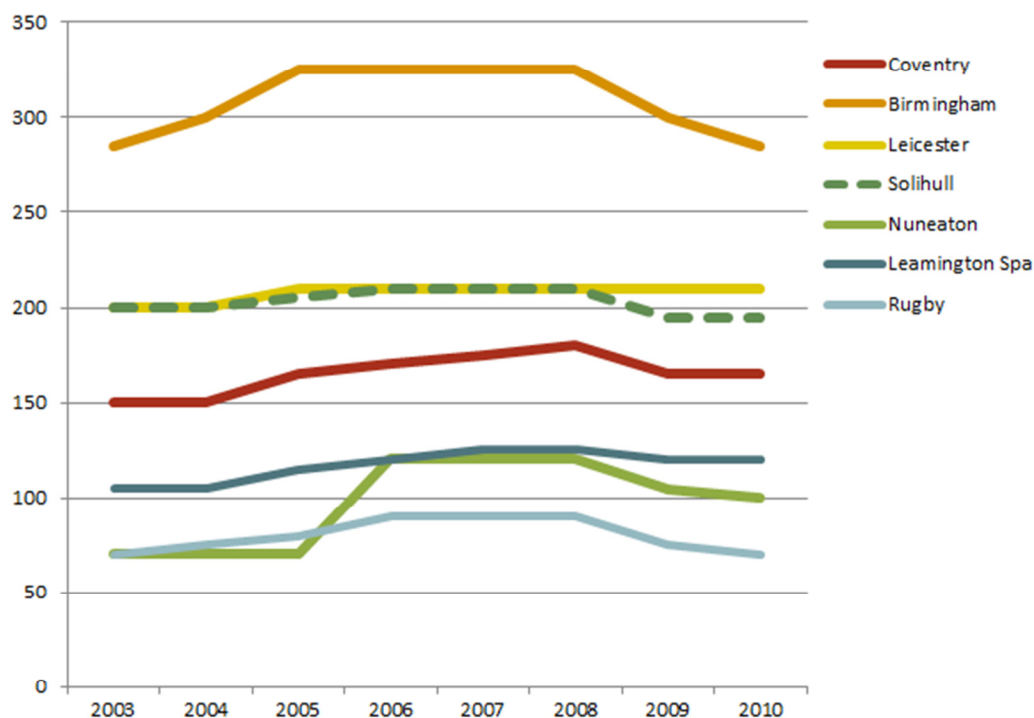
- 2.8 Venuescore's score does not necessarily reflect the overall size of the centre or the number of shops, but the presence of national multiples and the relative draw and importance that stores have. Each centre is given a weighted score which takes account of its provision of multiple retailers and anchor store strengths. For example, anchor department stores such as John Lewis or Debenhams receive a higher score than other multiple operators, in order to reflect their major influence on non-food shopping patterns. A location which has stronger retailers which attract more visitors to the centre and have a greater influence on shopping patterns will receive a higher score than those that do not.
- 2.9 A number of district centres and other shopping centre destinations (e.g. Airport Retail Park) are not included in the Venuescore list because their score is less than 10.
- 2.10 Coventry City Centre is categorised by Venuescore as a regional centre, and falls within the catchment areas of the major city centres of Birmingham and Leicester and the major regional centre of Solihull. The location of these Venuescore centres is shown in Figure 2.1 overleaf.
- 2.11 Figure 2.1 indicates that residents in Coventry City have good access to surrounding regional and major regional centres, as well as having a choice of smaller centres for day to day shopping needs.

Figure 2.1 Venuescore Shopping Hierarchy



- 2.12 The relative performance of and influence of retail centres can be demonstrated by reviewing the commercial property values, for example Zone A rental levels achieved for retail property. Figure 2.2 below shows the change in prime rental values in £ per square foot (£/sq.ft) for Coventry City Centre compared with other nearby competing centres for each year from 2003.

Figure 2.2 Comparison of Zone A Retail Rents (£/sq.ft)



Source: Colliers

- 2.13 Prime retail rents decreased in all the centres during the recession. The larger centres at the top of the hierarchy command the highest Zone A rents in 2010, i.e. Birmingham (£285/sq.ft), Leicester (£210/sq.ft) and Solihull (£195/sq.ft). Coventry performs reasonably well with a rent of £165/sq.ft.

Retail Provision in Coventry City

- 2.14 An assessment of retail and service provision in the main centres is provided in Appendix 6. In terms of the number of Class A1 retail units and retail floorspace, Coventry City Centre is the main shopping destination (243 Class A1 retail units) and serves a wide catchment area. The major district centres and district centres all provide a reasonable range of shops and facilities that serve the surrounding areas. Local centres and parades generally include shops of a more local nature, serving a small catchment. They can include a small supermarket, newsagent, post office, takeaways and pharmacy.
- 2.15 National and local policy indicates that it is important for Coventry's centres to maintain and strengthen their role in the retail hierarchy. The smaller centres should continue to perform a more local function meeting day to day shopping and service needs.

3.0 **Assessment of Retail Need**

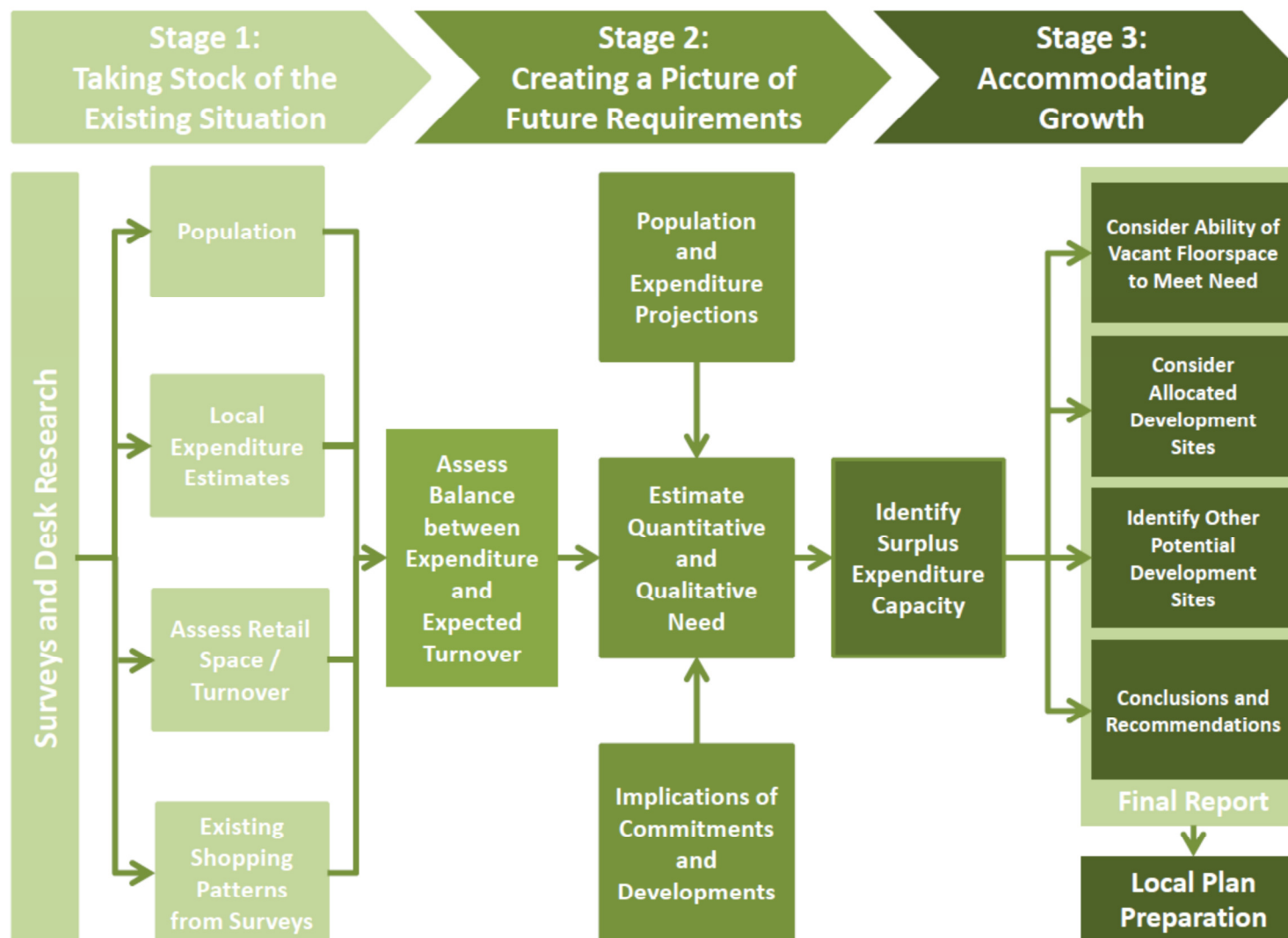
Introduction

- 3.1 The National Planning Policy Framework (NPPF) indicates (paragraph 14) that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs.
- 3.2 The Planning Policy Guidance (PPG) indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses.
- 3.3 The PPG also introduces the requirement to consider a range of plausible scenarios, including a 'no development' scenario, which should not assume that all centres are likely to benefit from expenditure growth.
- 3.4 This section objectively assesses the quantitative and qualitative scope for new retail floorspace in Coventry City in the period from 2014 to 2031. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken as part of the centre audits in Appendix 6.

Study Area

- 3.5 The quantitative analysis is based on a defined study area that covers the catchment areas of the City Centre and the other main shopping destinations in Coventry. The study area is sub-divided into eight zones based on postcode sectors, as shown in Appendix 1.
- 3.6 There will be retail expenditure leakage from the study area to centres outside, but conversely expenditure will inflow from surrounding areas.
- 3.7 The methodology is summarised in Figure 3.1 overleaf and set out in more detail in Appendix 1.

Figure 3.1 Methodology for Estimating Future Requirements for Retail Floorspace



Retail Trends

- 3.8 This section considers the changes in the retail sector nationally and the implications for Coventry City.
- 3.9 The economic downturn had a significant impact on the retail sector. A number of national operators have failed (e.g. Blockbuster, Comet, HMV, JJB Sports, Jessops, Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat), leaving major voids within town centres and on retail parks.
- 3.10 Many town centre development schemes have been delayed and the demand for traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.
- 3.11 Assessing future expenditure levels needs to take into account the economic downturn and the likely pace of recovery. As set out in the previous section, the retail study update established the appropriate level of expenditure growth to be adopted over the study period, taking a long term view and recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken.
- 3.12 An overview of national trends within the retail sector is set out below.

Expenditure Growth

- 3.13 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However the recovery from the economic downturn is expected to result in slower growth in the short term.
- 3.14 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The speed of recovery from the economic downturn suggests that high past rates of growth are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further modern retail floorspace, even allowing for continued growth in home shopping. These national trends are anticipated to be mirrored in Coventry.
- 3.15 For convenience goods, Experian anticipates limited growth up to 2015, but stronger growth thereafter (0.8% per annum). For comparison goods, higher levels of growth are expected in the future (2.9% per annum after 2015), still at a lower rate than previous pre-recession trends.
- 3.16 Low expenditure growth and deflationary pressures in the non-food sector have had an impact on the high street in the last few years. As a result of these trends, the national shop vacancy rate (based on Goad Plan data) has increased from around 10% in 2005 to over 12% in 2014. The vacancy rate in

Coventry City Centre is 14.8%, which is higher than the national average. These figures suggest that during and since the recession Coventry has not performed as well as other centres across the country in terms of shop vacancies.

New Forms of Retailing

- 3.17 New forms of retailing (multi-channel shopping) have continued to grow, as an alternative to more traditional shopping. Home/electronic shopping has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect shopping has become more popular. The future growth of multi-channel retailing including home computing, internet connections and interactive TV will continue to have an effect on retailing in the high street and from traditional stores. Trends within this sector may well have implications for retailing within Coventry City.
- 3.18 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. The household survey results suggest 4.1% of households in study area did their last main food and grocery shopping via the internet/ delivery, and 4.3% of households do most of their non-food shopping at home via the internet, TV or catalogue. These figures represent a lower proportion than the internet's national share of retail expenditure (about 11.5% in 2012 – Experian, October 2013).
- 3.19 More details on internet shopping habits in the study area are set out in the results of the household survey, summarised in Appendix 7. The internet shopping figures for Coventry do not indicate higher levels of home shopping than the national average, however internet sales in Coventry should increase in the future and this assumption is reflected in the allowance made for a growth in the proportion of non-store spending, as set out in the retail capacity methodology in Appendix 1.
- 3.20 Recent trends suggest continued strong growth in this sector. Experian's Retail Planning Note 11 (October 2013) states:
- “The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for around a tenth of total retail sales...”*
- The rising share of internet sales in total retail transactions dominates the picture of SFT. Internet sales' share of total retail sales stood at near 10% in mid-2013 against 4.7% in June 2008 and just 2.9% as recently as March 2007...*
- Non-store retailing continues to grow rapidly, outpacing traditional forms of spending. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. There were 52.7 million internet users in the UK (representing 84.1% of the population) in mid-year 2012 according to Internet World Stats. So growth of the internet user*

base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2020. Our forecast has the SFT share of total retail sales reaching 17.4% by 2020 (15.4% in Retail Planner Briefing Note 9 of September 2011), rising to 20% by the end of the 2020s (15.5% previously)."

- 3.21 This Study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.
- 3.22 The implications on the demand for retail space need to be carefully considered. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators and click and collect operations, therefore growth in on-line sales may not always mean there is a reduction in the need for retail floorspace.
- 3.23 Given the likelihood that multi-channel shopping is likely to grow at a faster pace than total retail expenditure, the retail study assessment has adopted relatively cautious growth projections for retail expenditure (as set out in the retail capacity methodology, Appendix 1), and allowance has been made for retailers to increase their turnover density, due to growth in home shopping and click and collect.
- 3.24 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town centres (such as the Tesco Express/Metro, Sainsbury's Central/ Local store and Marks and Spencer's Simply Foods formats). The number of Tesco Express and Sainsbury's Local stores has increased significantly during the last decade, due to the operator's national expansion in this sector, and perhaps also due to the absence of available sites for larger food stores. This trend is evident in Coventry, eg. Tesco Express stores in various locations. The main food store operators have also increasingly sought representation in small towns in predominantly rural areas.
- 3.25 Food store operators have also implemented a programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have often increased the sale of non-food products within their food stores, including clothing and electrical goods. The recent recession halted this trend for extensions nationally.
- 3.26 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. This is evident in Coventry City, which currently has three Aldi stores and two Lidl stores.

- 3.27 A plan showing the location of the existing main food stores within Coventry City is included at Appendix 1.
- 3.28 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, Next, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon have also expanded out-of-centre.
- 3.29 The charity shop sector has grown steadily over the past 20 years and there is no sign this trend will halt. In many centres, charity shops have occupied vacated shop premises during the recession. In many cases charity shops can afford higher rents than small independent occupiers because of business rate discounts, therefore it does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary frontages.
- 3.30 The discount comparison sector has also grown significantly in recent years e.g. pound shops. This trend is also evident in Coventry. There are a number of charity shops within the city centre (7.4% of comparison units) but this is not a particularly high proportion, and below the national average of 8.4%.
- 3.31 Within town centres, many high street multiple comparison retailers have changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger regional and sub-regional centres, e.g. Birmingham and Leicester. Operator demand for space has decreased during the recession and, of those national multiples looking for space, many prefer to locate in larger centres.
- 3.32 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, was particularly weak during the recession, as evidenced by the recent closure of the Homebase on Ansty Road. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods.
- 3.33 The economic downturn had a significant impact on the retail sector. A key effect the economic downturn has had on high streets is the increase in vacant shop units. The average unit vacancy rate increased from below 9% before the recession began in 2008 to the current figure of around 12% (source: Experian Goad Plans).
- 3.34 Coventry does not appear to have withstood the effects of the recession well in terms of shop vacancies. The current vacancy rate is higher than the national average in the City Centre, and the number of vacant shop units has increased from 56 (10.4%) in 2005 to 84 (14.8%) in 2013.
- 3.35 The continuation of these trends will influence future operator requirements in Coventry City Centre with smaller vacant units becoming less attractive for new

multiple occupiers, and retailers increasingly looking to relocate into larger units in higher order centres. However, smaller vacant units could still be attractive to independent traders and non-retail services.

- 3.36 Operator demand for space has decreased during the recession, and of those retailers looking for space, many are likely to prefer to locate in larger centres, particularly multiple retailers. Demand from multiple retailers within Coventry City is likely to be weaker particularly in the smaller, district centres, which will affect the appropriate strategies for these centres.

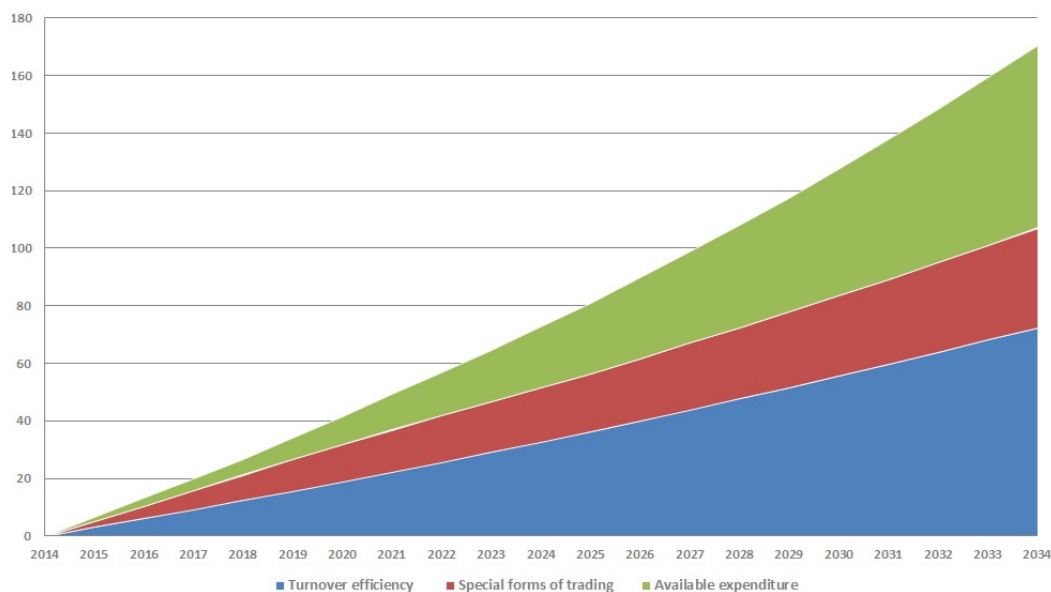
High Street Retail Trends

- 3.37 The number of shop units within town centres has declined consistently since the early 1970s. The Centre for Retail Research's "Retail In 2018" (CRR) figures show a decline from over 300,000 units in 2001 to 282,000 in 2012. The CRR "Retail In 2018" report predicts nearly 62,000 high street stores across Great Britain (22% in total) will close between 2012 and 2018.
- 3.38 Online/multi-channel shopping and increasing retail operating costs are cited as the main culprits. Similar predictions of the High Street's decline were made during previous recessions in the early 1980s and 1990s, which subsequently proved to be exaggerated. On this basis, it is important to examine these predictions within the context of longer terms structural trends.
- 3.39 These trends hide underlying structural changes in the retail sector. These changes are not new and have been affecting the High Street for many years. In response to these trends, town centres have changed and diversified. The food and drink, leisure and non-retail service sectors have been successful in occupying space no longer suitable for shopping. There have been cyclical trends in vacancy rates reflecting the macro economic trends, but in most cases town centres recovered during periods of stronger growth. The High Street is more resilient than many commentators give it credit.
- 3.40 There is an underlying trend towards fewer but larger retail stores. Valuation Office data indicates the amount of retail floorspace in England and Wales has grown by over 3% during the economic downturn (2008 to 2012), despite a period of poor expenditure growth and an increase in on-line shopping.
- 3.41 Shopping behaviour will continue to change and the High Street will need to continue to respond. All town centres will need to focus on the advantages they have over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience. There will always be demand for a day out and customers cannot eat or drink on-line.
- 3.42 Experian data indicates that retail expenditure reduced by 1.3% during 2009 to 2012, with the food/grocery and bulky comparison goods sectors hardest hit. These expenditure trends explain why the High Street has performed better than out-of-centre retail parks. During this period the proportion of expenditure attributed to non-store trading (including home shopping) increased from 7.1%

to 11.5%. These figure help to explain why High Streets and retail parks have struggled.

- 3.43 Experian's most recent forecasts suggest comparison goods expenditure per person will increase on average by 2.9% per annum, in real terms over and above inflation. If this forecast growth rate is achieved then comparison goods expenditure per person will increase by a third over the next 10 years and by 77% over 20 years. Taking into account ONS population projections, comparison goods expenditure in England will double over the next 20 years.
- 3.44 Not all projected expenditure growth will be available to support new retail floorspace. Non-store expenditure (special forms of trading) is expected to grow at a faster rate than expenditure and in proportional terms will absorb more growth. Continuing trends towards more modern and higher density stores, and the replacement of inefficient space will result in growth in turnover efficiency – Experian suggests a growth rate of 2% per annum for comparison floorspace. Figure 3.2 below shows how much expenditure growth may be available for new development over the next 20 years.

Figure 3.2: Growth in Comparison Goods Expenditure in England 2014 to 2034 (£ billion)



- 3.45 Allowing for growth in multi-channel shopping and increased turnover efficiency, there could still be £33 billion of growth available for new retail development in England over the next 10 years and £72 billion over the next 20 years.
- 3.46 The challenge for town centres generally, and Coventry City Centre specifically, will be to capitalise on this growth by securing much needed investment. There will be continued scope for centres to diversify, for example the evening economy, leisure and entertainment and more focus on convenience and service, but comparison retail will still be the driver of growth in many centres.

- 3.47 The delivery of town centre redevelopment opportunities will be the priority. There will be a requirement to build more retail floorspace within Coventry, not only to boost its retail offer and compete effectively with other centres, but also to secure investment in the centre.

Population and Expenditure

- 3.48 The study area population for 2011 to 2031 is set out in Table 1 in Appendix 2. Population data has been obtained from Experian for each zone based on the 2011 Census. The 2011 base year population for each zone has been projected to 2031 based on the Coventry and Warwickshire Joint SHMA (November 2013) Projection 1A and ONS 2012 Projections for Solihull.
- 3.49 An alternative, high population growth scenario has been tested assuming the ONS 2012 Projections for the study area as a whole, and the higher projections are shown in Table A, Appendix 2.
- 3.50 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2031. Forecasts of comparison goods spending per capita are shown in Table 2 in Appendix 3.
- 3.51 Based on the baseline population projection, as a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 25% from £933.64 million in 2014 to £1,164.41 million in 2031, as shown in Table 3 (Appendix 2).
- 3.52 Based on the baseline population projection, comparison goods spending is forecast to increase by 75% between 2014 and 2031, increasing from £1,231.91 million in 2014 to £2,119.19 million in 2031, as shown in Table 3 (Appendix 3).
- 3.53 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on food and drink does not increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income.
- 3.54 These figures relate to real growth and exclude inflation.

Existing Retail Floorspace 2014

- 3.55 Existing convenience goods retail sales floorspace within Coventry City is 63,712 sq.m net, as set out in Table 10 in Appendix 2. This floorspace figure excludes comparison sales floorspace within food stores. Nearly 40% of this food and grocery floorspace is located in North East Coventry, which provides two Tesco Extra stores and an Asda. A definition of net sales and gross floorspace is provided in the methodology statement in Appendix 1.
- 3.56 Comparison goods retail floorspace within Coventry City is estimated to be 199,700 sq.m net, as shown in Table 10 in Appendix 3. This sales floorspace is broken down as follows:

- Coventry City Centre 69,900 sq.m net (35%);
- Major District Centres 18,700 sq.m net (9%);
- District Centres 13,000 sq.m net (7%);
- Local centres/parades 6,400 sq.m net (3%);
- Non-bulky goods retail warehouses 27,500 sq.m net (14%); and
- Bulky goods retail warehouses 64,200 sq.m net (32%).

Existing Spending Patterns 2014

3.57 The results of the household shopper questionnaire survey undertaken by NEMS in June 2014 have been used to estimate existing shopping patterns within the study area zones. A summary of the methodology and results is shown in Appendix 7.

Convenience Shopping

3.58 The results of the household shopper survey relating to main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 2.

3.59 Table 4 (Appendix 2) indicates the proportion of convenience goods expenditure retained within Coventry City is relatively high. For the inner catchment area (Zones 1-4), retention is above 95%. For the outer catchment area, the proportion of convenience goods expenditure within each zone that is spent within Coventry ranges from 35.7% in Zone 5 to just 8.8% in Zone 8.

3.60 The level of convenience goods expenditure attracted to shops/stores in Coventry in 2014 is estimated to be £633.96 million as shown in Table 5, Appendix 2. This includes estimates of inflow from beyond the study area, applying the market shares set out in Table 4.

3.61 The total benchmark turnover of identified existing convenience sales floorspace within Coventry is £646.01 million (Table 10, Appendix 2).

3.62 These figures suggest that convenience goods retail sales floorspace in Coventry City is collectively trading at a level around company average. However, Table 11 shows that stores in Coventry South East (Zone 1) and Coventry North East (Zone 3) are trading below benchmark, while stores in Coventry North West (Zone 2) and Coventry South West (Zone 4) are trading above benchmark.

3.63 Overall there is a slight deficit of expenditure (-£12.05 million) within Coventry as a whole, i.e. the difference between the actual spending at retail facilities in Coventry and the benchmark turnover of the facilities.

Comparison Shopping

- 3.64 Table 4 (Appendix 3) indicates the proportion of comparison goods expenditure within each zone that is spent within Coventry City ranges from 86.0% in Zone 3 to 18.2% in Zone 8. The retention of comparison goods expenditure is generally lower than for convenience goods. This reflects the propensity of customers to do food and grocery shopping locally, whilst for comparison shopping, customers are more likely to shop around and/or travel longer distances to visit larger centres that have more choice. The ability to increase comparison goods market share will be constrained by larger centres in the sub-region, without a significant improvement in the qualitative offer of retail provision in Coventry, for example the implementation of development at City Centre South.
- 3.65 The estimated comparison goods expenditure currently attracted by shopping facilities within Coventry City is £808.86 million in 2014, as shown in Table 5, Appendix 3. This includes estimates of inflow from beyond the study area.
- 3.66 Based on this expenditure estimate, the average sales density for existing comparison goods sales floorspace in Coventry (199,700 sq.m net) is £4,050 per sq.m net. The analysis of existing comparison shopping patterns in 2014 suggests the following average sales density figures for the centres/facilities in Coventry shown in Table 3.1 below.
- 3.67 Coventry City Centre and Arena Park have the highest comparison goods average sales density, which reflects the stronger presence of national multiples. Other district and local centres generally have a lower trading density, which reflects the predominance of independent traders, but it should be noted that household survey results will tend to under-estimate the market share of local shops. Retail warehousing appears to be trading at a satisfactory level. Based on the company average sales density of selected bulky goods retailer warehouse operators, retail warehouses generally trade at between £2,500 to £3,000 per sq.m net.

Table 3.1: Comparison Goods Average Sales Densities

Centre	Average Sales Density 2014 (£ per sq.m net)
Coventry City Centre	£5,222
Arena Park MDC	£5,869
Cannon Park MDC	£4,867
Other District/Local Centres	£4,840
Non-Bulky Retail Warehousing	£2,932
Bulky Retail Warehousing	£2,571
Coventry City Average	£4,050

- 3.68 On balance, existing floorspace in Coventry appears to be trading satisfactorily in difficult but improving market conditions. Growth in population and

expenditure, and the potential for Coventry City Centre to increase its market share (reduce expenditure leakage) indicate there is scope to reduce shop vacancy levels and accommodate new development in the short to medium term.

Capacity for Convenience Floorspace

- 3.69 As a minimum it is appropriate and realistic to plan to maintain Coventry's market share of convenience goods expenditure in the future. Planning for a decline in market share would not be sustainable and would not address the needs of local residents. It should be noted that as the forecast increase in internet spending is taken into account in projecting available expenditure in the future, this will have the effect of reducing the actual requirement for additional floorspace.
- 3.70 Based on constant market shares and baseline population projections, the future level of available convenience goods expenditure at 2017, 2021, 2026 and 2031 is shown at Tables 6, 7, 8 and 9 in Appendix 2.
- 3.71 The total level of convenience goods expenditure available for shops in Coventry City between 2014 and 2031 is summarised in Table 11 (Appendix 2). Convenience expenditure available to shopping facilities in Coventry is expected to increase from £633.96 million in 2014 to £787.15 million in 2031.
- 3.72 Table 11 subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further development. Within Coventry, there is an expenditure deficit of -£12.05 million convenience goods expenditure in 2014. By 2017, there is a surplus of available convenience goods expenditure of £7.62 million. Continued future growth produces a surplus of £40.38 million in 2021, increasing to £89.48 million in 2026 and £141.13 million in 2031.
- 3.73 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 12. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £13,000 per sq.m, based on the average turnover of the main food supermarket operators.
- 3.74 The short to medium term capacity figures up to 2021 suggest surplus of available convenience goods expenditure could support an additional 3,106 sq.m net (4,438 sq.m gross), in Coventry South West and Coventry North West. There is no need identified for additional floorspace in Coventry North East or Coventry South East. In the long term, surplus expenditure at 2031 could support 10,856 sq.m net of sales floorspace (15,509 sq.m gross) in Coventry as a whole, as shown in Table 11, Appendix 2.
- 3.75 The 2031 floorspace projection (10,856 sq.m net) represents about 3 to 4 new large food stores. This project assumes food stores trade at company average turnover levels across the City. In reality there may not be operator demand to build this level of floorspace. Food store operators may require higher than

company average turnover levels to make new food stores in Coventry viable, therefore the floorspace projections should be viewed as a maximum requirement.

- 3.76 Furthermore, if this level of food store development was provided in out-of-centre locations the reduction in trade and impact on existing centres could be significant and may be unacceptable if centres lose a significant number of linked food and non-food shopping trips.

Alternative Population Growth Scenario

- 3.77 The convenience goods floorspace projections set out above are based on the Coventry and Warwickshire Joint SHMA (November 2013) Projection 1A and ONS 2012 Projections for Solihull. The implications of adopting the higher growth scenario assuming ONS 2012 Projections for the study area as a whole have also been tested.
- 3.78 Adopting the higher population growth forecast (Table A, Appendix 2) results in around a 4% increase in the total population in the study area by 2031. This in turn results in an increase in the level of surplus convenience goods expenditure to support new retail floorspace in Coventry City, as shown in Table B, Appendix 2. By 2031, there is an additional £57.99 million of surplus convenience goods expenditure. The implications of this increase in surplus expenditure is a requirement for an additional 4,461 sq.m net (6,373 sq.m gross) of convenience goods floorspace in Coventry by 2031, as shown in Table C, Appendix 2.

Capacity for Comparison Floorspace

- 3.79 The household survey suggests that Coventry's retention of comparison goods expenditure is generally lower than for convenience goods, although there is still a reasonable level of retention in the inner catchment area. A lower level of comparison expenditure retention is due to the strength of competing comparison goods facilities in neighbouring authorities, including Birmingham, Solihull, Rugby and Leicester. Coventry City Centre and Arena Park achieve the highest comparison goods market shares, due to the national multiple comparison retailers present in these centres.
- 3.80 Future improvements to comparison retail provision within Coventry City Centre could help to claw back some additional expenditure leakage from the study area. However major developments in neighbouring authorities will affect the ability of shopping facilities in Coventry to increase their market share of expenditure. Some retail development will be necessary in Coventry City in order to maintain existing market share in the future. An appropriate strategy for Coventry should be to seek as a minimum to maintain existing 2014 market shares in the face of increasing future competition in nearby centres, whilst maintaining the vitality and viability of centres.
- 3.81 It is realistic and appropriate for Coventry City as a whole to plan to maintain if not improve market shares. It may be appropriate to readjust the shares of the

centres within Coventry City. For example, the provision of significant levels of retail floorspace in the City Centre will increase its market share.

- 3.82 Emerging redevelopment proposals for Coventry City Centre South seek to deliver a mix and format of retail premises that will enable and attract a greater number of national retailers to locate with the City Centre. The delivery of a significant uplift in the quality and quantity retail floorspace in the City Centre will assist Coventry in improving its comparison offer and competitive position, which will in turn reduce the leakage of expenditure to the competing centres of Leamington Spa, Nuneaton, Solihull and Rugby.
- 3.83 The Council should plan to maintain the existing role of centres, and in the case of Coventry City Centre seek to strengthen its retail role, while recognising that it falls within the catchment area of higher order regional and major regional centres. The district centres should maintain a complementary role supporting the city centre. These centres will need to be maintained but are unlikely to grow significantly. These centres should not grow to a level where they would challenge the City Centre. The impact of major development within these centres should be monitored and impact assessments may be required to ensure planned investment within the City Centre is not jeopardised.
- 3.84 Future comparison market shares are shown in Table 6 in Appendix 3. These market shares have been adjusted to reflect major redevelopment proposals within Coventry City Centre.
- 3.85 Based on the baseline population projections and adjusted market shares, available comparison goods expenditure has been projected forward to 2017, 2021, 2026 and 2031 in Tables 7, 8, 9 and 10 in Appendix 3, and summarised in Table 12. Available comparison expenditure to facilities within Coventry is expected to increase from £808.86 million in 2014 to £1,425 million in 2031.
- 3.86 For the purposes of this assessment, the existing comparison goods floorspace is estimated to be trading at equilibrium in 2014 (i.e. satisfactory levels), as shown in Table 12 (Appendix 3). Table 12 assumes that the turnover of comparison floorspace will increase in real terms in the future. A growth rate of 2% per annum is adopted, and this growth is required to maintain the health and viability of town centres, as recommended by Experian. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.
- 3.87 The turnover of retail development commitments (listed at the foot of Table 12) is subtracted from surplus expenditure projections. Surplus expenditure projections minus retail commitments is shown in Table 13, Appendix 3. Retail commitments are expected to absorb surplus expenditure beyond 2017 and most of the surplus up to 2021.

- 3.88 Within Coventry City as a whole, by 2021 there will be a small expenditure surplus over and above commitments of £4.02 million. This surplus increases to £92.36 million in 2026. By 2031, future expenditure growth generates an expenditure surplus of £206.72 million.
- 3.89 Surplus comparison expenditure has been converted into net comparison sales floorspace projections at Table 13 in Appendix 3, adopting average sales densities in 2014 of £6,000 per sq.m for “non-bulky” floorspace and £2,500 per sq.m for “bulky” floorspace, which are projected to grow by 2% in the future due to improved turnover efficiency. The surplus expenditure at 2031 could support 31,496 sq.m net of sales floorspace (39,779 sq.m gross) over and above commitments (as listed at the foot of Table 12).

Alternative Population Growth Scenario

- 3.90 The comparison goods floorspace projections set out above are based on the Coventry and Warwickshire Joint SHMA (November 2013) Projection 1A and ONS 2012 Projections for Solihull. The implications of adopting the higher growth scenario assuming ONS 2012 Projections for the study area as a whole have also been tested.
- 3.91 The higher population growth forecast (Table A, Appendix 3) results in around a 4% increase in the total population in the study area by 2031, and an increase in the level of surplus comparison goods expenditure to support new retail floorspace in Coventry, as shown in Tables B and C in Appendix 3. By 2031 there is an additional £67.69 million of surplus comparison goods expenditure and this increase could support an additional 10,130 sq.m net (12,821 sq.m gross) of comparison goods floorspace in Coventry by 2031, as shown in Table C, Appendix 3.

Qualitative Need for Retail Floorspace

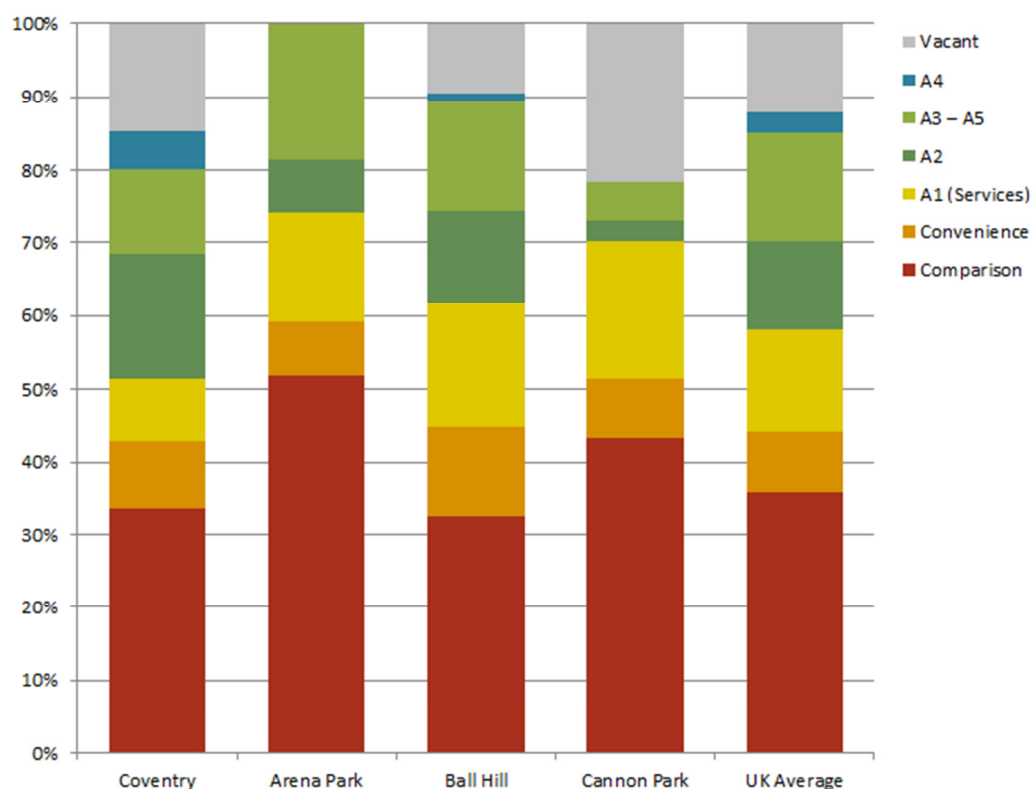
- 3.92 The section above quantifies the theoretical capacity to support new retail floorspace within Coventry, based on the population projections. The qualitative need for retail facilities also needs to be considered. Qualitative need can be assessed through consideration of the following factors:
- deficiencies or ‘gaps’ in existing provision;
 - consumer choice and competition;
 - overtrading, congestion and overcrowding of existing stores;
 - location specific needs such as underserved markets; and
 - the quality of existing provision.

Diversity of Town Centre Uses

- 3.93 Figure 3.3 below shows the composition of the City Centre and the major district centres in terms of the mix and proportion of different uses, i.e. the proportion of shop units within each use class. This is compared to the Goad average mix for all centres across the country.

- 3.94 Coventry City Centre and Ball Hill have a slightly lower proportion of comparison goods shops when compared to the national average, while Arena Park and Cannon Park both have a higher proportion. Generally, larger centres have a higher proportion of comparison shop units than smaller centres. Larger centres tend to have a stronger focus on fashion shopping and therefore have a higher proportion of comparison shops. Smaller centres tend to have a higher proportion of convenience goods units and service uses, serving the local/day to day needs of their catchment area.
- 3.95 This suggests that Coventry City Centre is not performing at the level that would normally be expected for a centre of this size in terms of its comparison goods retail offer. Arena Park and Cannon Park are both purpose built centres with a higher proportion of retail units than traditional centres.
- 3.96 Notwithstanding this, Coventry City Centre has a good mix and choice of comparison goods retailers, with a reasonable proportion of clothing and footwear shops and presence of national multiple retailers. The smaller centres generally have higher proportions of lower order comparison shops, i.e. selling items bought on a regular basis, and more independent retailers. The audit of centres in Appendix 6 provides a more detailed breakdown of the uses present in each centre.

Figure 3.3 Major Centres Mix of Uses by Unit (%)



- 3.97 Vacancy rates are higher in Coventry City Centre and Cannon Park when compared to the national average. The number of vacant units in the City Centre has increased by 28 units (50%) from 56 in 2005 to 84 in 2013, while

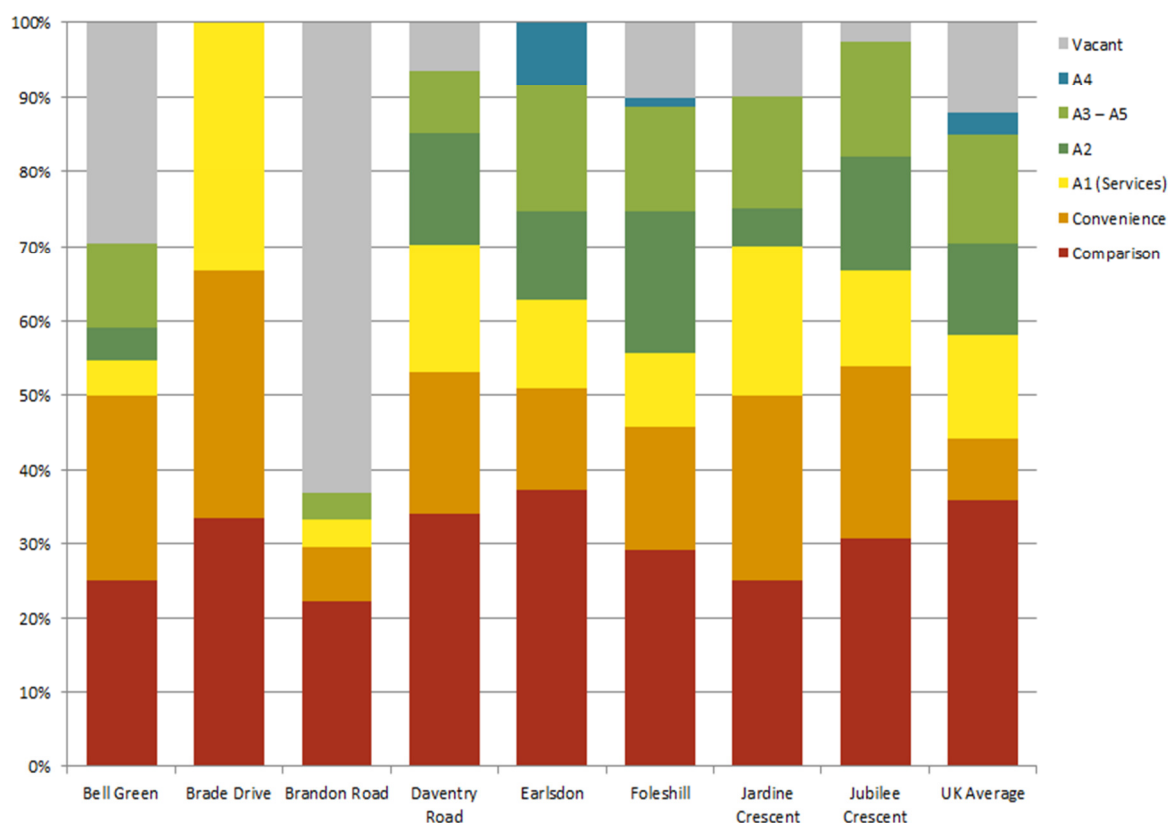
the number of vacant units in the major district centres has remained similar. In overall terms Coventry City Centre appears to have a reasonable evening economy with a reasonable proportion of restaurants/café's and pubs/bars. However these uses are focused within a number of fringe like locations. The night time economy could still be enhanced within the core area of the City Centre.

3.98 Figure 3.4 below shows the composition of the district centres in terms of the mix and proportion of different uses, compared to the Goad average.

3.99 The recently developed Warwickshire Shopping Park accounts for the high vacancy rate within Brandon Road, as the majority of these units have not been occupied. Brade Drive contains only an Asda store and five unit shops, which explains the lack of diversity within this centre. Bell Green district centre has a high number of vacant units within the Riley Square shopping area. All other district centres have a reasonable vacancy level compared to the national average. The district centres all have a good provision of convenience goods retail in terms of the proportion of units.

3.100 The audit of centres in Appendix 6 provides a more detailed breakdown of the uses present in each centre.

Figure 3.4 District Centres Mix of Uses by Unit (%)



Convenience Goods Shopping

3.101 The household survey results indicate that most residents in the study area undertake both a main shopping trip and top-up shopping trips. Main shopping trips are generally made once a week or less often, and the household survey identified that 88% of respondents travel to do their main food shopping by car (both driver and passenger), compared with 65% for non-food shopping. The availability of a wide range of products and car parking are important requirements for main/bulk food shopping trips. Large supermarkets or superstores (Over 1,000 sq.m net) are the usual destination for these types of shopping trip.

3.102 The location and distribution of existing food stores within Coventry is shown on Plan 2, Appendix 1.

3.103 Coventry City is well served by superstores (over 2,500 sq.m net), particularly serving the north east and south west of the City, as summarised below.

South East Coventry:

- Asda, Abbey Park, London Road 3,094 sq.m net;
- Morrisons, Skipworth Road, Binley 3,643 sq.m net.

North East Coventry:

- Asda, Brade Drive, Walsgrave 6,884 sq.m net;
- Sainsbury's, Austin Drive 3,093 sq.m net;
- Tesco Extra, Crosspoint Retail Park 5,985 sq.m net;
- Tesco Extra, Longford Road, Arena Park 8,547 sq.m net;
- Tesco, Clifford Bridge Road, Walgrave 2,627 sq.m net.

South West Coventry:

- Morrisons, Holyhead Road 3,618 sq.m net;
- Sainsbury's, Fletchamstead Highway, Canley 5,664 sq.m net;
- Tesco, Lynchgate Road, Cannon Park 3,126 sq.m net.

3.104 The food superstores are supported by a good range of large and small supermarkets and convenience stores. There are five large supermarkets (over 1,000 sq.m net) in Coventry City and a large number of smaller supermarkets (between 400 to 1,000 sq.m net).

3.105 These food superstores and supermarkets are supported by smaller stores including Tesco Express stores, Co-op stores and a number of other small convenience stores. The discount food sector is represented by three Aldi stores and two Lidl stores.

3.106 The audit of main centres in Appendix 6 indicates all centres have a choice of convenience goods shops, ranging from two outlets in Arena Park, Brade Drive and Brandon Road to 53 outlets in Coventry City Centre.

- 3.107 All residents in Coventry have good access to food stores both within and outside the City. There are no obvious areas of deficiency in food store provision, although there are no large superstores located to the north west of the City.

High Street Comparison Shopping

- 3.108 An assessment of the shopping hierarchy is shown in Section 2 and an audit of the shopping facilities within the main centres is shown in Appendix 6. Coventry City Centre is the dominant high street comparison shopping destination in terms of the number of outlets, sales floorspace and representation of multiple retailers. It has a reasonable range of comparison shops including many national multiples and independent specialists. However, Coventry is positioned below other centres in the shopping hierarchy, and is ranked below Birmingham, Leicester, Solihull and Northampton in terms of multiple retailer representation. These competing centres are accessible to residents within Coventry and have a more extensive range of multiple retailers than Coventry City Centre. Many residents within Coventry and the surrounding area are likely to continue to shop in these higher order centres.
- 3.109 Coventry City Centre is supported by the major district centres of Arena Park, Ball Hill and Cannon Park, together with the district centres of Bell Green, Brade Drive, Brandon Road, Daventry Road, Earlsdon, Foleshill, Jardine Crescent and Jubilee Crescent. Coventry also contains and numerous local centres and parades throughout the City. These smaller centres have a much more limited range of multiple retailers, but have a selection of specialist independent retailers. Coventry City Centre will remain the main high street comparison shopping destination.
- 3.110 The centre audits in Appendix 6 identify that Coventry City Centre has a lower proportion of comparison retail units compared with the national average. However, the city centre has the best representation of comparison goods retailers, including a number of national multiples, complemented by a range of independent traders.
- 3.111 Coventry City Centre has representation in most comparison goods categories and there is generally a choice of outlets within each category (190 comparison shops in total). The clothing and footwear sector is well represented with 65 shops. Coventry has a reasonable mix of lower and higher order comparison goods. Lower order comparison goods are items bought on a regular basis, where customers are less likely to shop around or travel long distances to shop. Higher order goods tend to be higher value items bought occasionally, where customers window shop and compare prices and goods. Healthy town centres usually have a good mix of higher and lower order comparison goods shops.
- 3.112 There is a reasonable range and choice of comparison shops in Ball Hill (34 in total), with limited choice within each goods category. Arena Park (14 units) and Cannon Park (16 units) have a more limited selection of comparison shops. Arena Park has a reasonable representation of national multiple

retailers. Comparison retailers in the remaining major district centres and district centres are predominantly small independent traders selling lower order comparison goods, such as pharmaceutical goods, flowers and other day to day items. The exception is Brandon Road district centre, which provides new, modern retail units within the Warwickshire Shopping Park, which are likely to be occupied by national multiple comparison goods retailers.

Retail Warehouses

- 3.113 There are four main retail parks in Coventry City, - Alvis Retail Park, Gallagher Retail Park, Central 6 Retail Park and Airport Retail Park, together with a number of smaller retail parks and solus retail warehouse units. At the time of the Coventry City Council 2013 Land Use Survey, there were 49 retail warehouse units selling comparison goods, plus four vacant stores. However, we are aware that the Homebase store on Ansty Road has since closed down and is being marketed for alternative retail uses. Permission has also been granted for additional retail warehouse units at Bishopgate Retail Park and Blue Ribbon Retail Park.
- 3.114 The retail warehouses provide a mix of bulky and non-bulky comparison goods. The stores selling predominantly bulky goods (DIY, furniture, electrical and floorcoverings etc.), including the Ikea in Coventry City Centre, have a total sales area of 64,200 sq.m net (see Table 10 in Appendix 3). The predominantly non-bulky retail warehouses have a sales area of about 27,500 sq.m net. The retail warehouses are distributed throughout Coventry City. The largest retail park, Gallagher Retail Park, is located to the north of the city, close to Coventry Arena. Alvis and Central 6 retail parks are both located to the west of the city centre.
- 3.115 The bulky goods retail warehouse sector has suffered during the recession and growth has been limited in recent years. However, the existing provision of retail warehouse stores is excellent in Coventry City, and these facilities also appear to serve neighbouring LPA areas. All residents in Coventry have good access to retail warehouses.

4.0 Requirements for Other Town Centre Uses

Introduction

- 4.1 This section assesses the potential for commercial leisure and other town centre uses in Coventry City, including for a cinema, tenpin bowling, bingo, theatres, nightclubs, private health and fitness clubs and catering, pubs and bars.

Commercial Leisure Uses

- 4.2 There is a reasonable provision of commercial leisure and entertainment facilities within Coventry City, although residents also utilise facilities in neighbouring authorities. Coventry's residents have good access to major leisure facilities in Birmingham, Solihull, Nuneaton, Leamington Spa and Rugby.
- 4.3 Based on NLP's experience and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20 minutes travel time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres and family entertainment centres require a large catchment population, and often benefit from locating together or in large out of centre leisure parks.

Cinemas

- 4.4 There are two mainstream cinemas in Coventry – Odeon Cinema at the Skydome (9 screens and 1,921 seats) and Showcase Cinema (14 screens and 3,413 seats), Gielgud Way. There is also a cinema screen at the University of Warwick Arts Centre (one screen with 240 seats), which has limited viewings.
- 4.5 In total around 53% of respondents to the household survey results visit the cinema, and of these 62% visited the cinemas within Coventry. The market share of trips within the inner catchment area (Zone 1 to 4) is 86%, which indicates 14% of cinema trips from residents in Coventry leak to other destinations. These trips are primarily from the north and west of Coventry and the trips go to Bermuda Park, Nuneaton (7%), Birmingham (3%) and Solihull (1%). Coventry's market share of cinema trips in the outer study area zones is relatively low. There may be potential to claw back some of these cinema trips.
- 4.6 The capacity for cinema seats within Coventry is calculated in Appendix 4. The study area population in 2014 (524,352 people) will generate 1.47 million cinema trips per annum, based on the national average visitation rate (2.8 trips per annum). The market shares estimated from the household survey suggests about 953,000 of these cinema trips will be attracted to Coventry City, or around 1.06 million trips allowing for 10% inflow (Tables 2 to 4 in Appendix 4).
- 4.7 Based on the national average trips per cinema screen (47,000 trips per screen), 1.06 million trips generates demand for 23 screens. The existing

cinemas in Coventry City have 24 screens, although the Warwick Arts Centre is not a mainstream full time cinema. These figures suggest there is reasonable balance between supply and demand in Coventry in 2014 (see Table 9 in Appendix 4). However as indicated above, there is potential for Coventry to increase its market share of cinema trips. We understand development proposals within the City Centre could include a cinema, which if implemented should help to claw back cinema trips.

Based on uplifted market shares (shown in Table 5, Appendix 4) the number of trips generated by the study area population at 2017, 2021, 2026 and 2031 is shown in Tables 6 to 9 in Appendix 4. Based on constant market shares, the number of trips attracted to Coventry is expected to increase from 1.06 million in 2014 to 1.19 million in 2031. If Coventry's market share can be improved, as suggested in Table 5, Appendix 4, then 1.4 million trips could be attracted to Coventry in 2031.

- 4.8 Based on the national average visitation rate and the uplifted market shares, the study area population at 2031 could generate demand for 30 screens within Coventry, compared with the current provision of 24 screens. The analysis above suggests there is theoretical scope of an additional cinema in Coventry. The implementation of a new cinema will be dependent on operator demand.

Theatres

- 4.9 40% of respondents to the household survey indicated that they visited theatres, and this is the fourth most popular leisure activity. This figure is slightly lower than NLP's average for other surveys of 42.5%. When asked where they had last visited the theatre, Coventry City Centre (47.3%) was the most popular location, followed by Birmingham (20.5%) and Central London/West End (13.4%). 4.6% mentioned other theatres in Coventry outside the City Centre.
- 4.10 The Belgrade Theatre in the City Centre is Coventry's largest theatre, however there are a number of smaller theatres and companies located throughout Coventry, including the Criterion Theatre, Theatre Absolute, Wheatsheaf Players, Triangle Theatre and the Warwick Arts Centre.
- 4.11 There is no clear need for additional theatre provision in Coventry, and existing facilities are popular and well used. However if proposals were brought forward for additional facilities, they should be supported as they would enhance the overall offer of Coventry.

Private Health and Fitness Clubs

- 4.12 The household survey indicates that 23.8% of respondents or their families visit a health/fitness club. Of these, around 51.5% visit health and fitness facilities within Coventry City. For the inner catchment area (Zones 1 to 4), around 75% of those who visit health/fitness club use facilities within Coventry City.

- 4.13 There are a number of gyms and health clubs within Coventry City, as highlighted by the household survey results and summarised in Table 4.1 below.

Table 4.1: Coventry Health and Fitness Clubs

Alan Higgs Centre	Pure Gym
Apollo Weight and Fitness Centre	Bodyworx Gym
Centre AT7	Pro Gym
Coventry Sports and Leisure Centre	Simply Gym
Ernesford Grange Leisure Centre	Esporta Health & Racquet Club
Foleshill Leisure Centre	Bodyworx Gym for Women
Moat House Leisure Centre	Virgin Active
Sidney Stringer Academy	Results4U
Sportfit (Henley College)	Power League Coventry
Woodlands Academy	Capital Gym
Xcel Leisure Centre	Fitness Factory
Royal Court Hotel	Spirit Health & Fitness

- 4.14 Coventry City's adult population (16 and over) is approximately 265,600 in 2014 (for Zones 1 to 4), which could generate demand for about 31,900 public and private gym membership places, based on the national average membership rate (12%). Information provided by Sport England's Local Sport Profile Tool suggests that the proportion of adults in Coventry who are physically active (49.4%) is lower than the England average (56.6%). However, the participation in sport (at least once a week) in Coventry is 35.8%, compared to the England average of 35.7%. On this basis, it is reasonable to adopt the national average membership and participation rates.
- 4.15 This potential membership estimate and the 24 health and fitness clubs identified above, imply an average of around 1,330 members per club, which is slightly lower than the national average for private fitness clubs (1,375 members). These figures suggest there is an adequate supply of gyms and health clubs within Coventry.
- 4.16 The adult population within Zones 1 to 4 is expected to increase by about 33,200 between 2014 and 2031, which would generate around 4,000 new health club members, of which 3,000 (75%) should be attracted to Coventry, based on existing market shares. These figures suggest that there could be demand for two new health and fitness clubs in Coventry to meet this growth in demand up to 2031.

Tenpin Bowling

- 4.17 There is one tenpin bowling facility in Coventry – Tenpin at Cross Point Business Park, with 34 lanes. The household survey results suggest that 23.7% of households in the study area visit tenpin bowling facilities. The majority (54.1%) of these respondents visit Tenpin in Coventry.

- 4.18 Based on the existing market share (54.1%), Coventry's tenpin bowling catchment potential is about 315,000 in 2014, assuming 10% inflow from beyond the study area. This population can theoretically support 26 lanes, based on one lane per 12,000 people (national average). These figures suggest existing provision is meeting existing demand. However the survey results suggest Coventry's market share of tenpin bowling trips is relatively low within the south of the City and the study area.
- 4.19 The provision of additional tenpin bowling facilities within the central or southern parts of the City could help to increase Coventry's market share of tenpin bowling trips.
- 4.20 If Coventry's market share of trips increased from 54.1% to 75% and allowing for 10% inflow the study area population at 2031 (592,526) could in theory support 41 lanes.
- 4.21 These figures suggest that there no quantitative need to allocate a site for an additional tenpin bowling facility in Coventry. However in qualitative terms, a proposal within a designated centre that could be encouraged to improve access to tenpin bowling facilities within the central and southern parts of the City.

Bingo

- 4.22 Gala and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators require buildings of between 2,000 - 3,000 sq.m, capable of seating up to 2,000 people, with a catchment population of 50,000 to 70,000 within freestanding towns (source: BISL).
- 4.23 Within Coventry, there are four Gala Bingo facilities and a Rialto Bingo. The household survey results indicated that 7.3% of households in the study area visit bingo facilities, and of these, around 60% visited bingo facilities in Coventry. The national average bingo visitation rate is around 5%.
- 4.24 The inner catchment area adult (over 18) population (approximately 257,700 in 2014) could generate about 451,000 admissions based on the national participation rate (1.75 trips per adult). Based on national average figures (113,000 admissions per club), the study area population could support four bingo facilities. The adult population in the study area is estimated to increase by around 32,200 between 2014 and 2031, which suggests the inner catchment area population could support up to five bingo facilities by 2031.
- 4.25 The existing supply of bingo facilities within Coventry is sufficient to meet the existing and likely future demand, and there is no need to plan for the provision of new bingo facilities.

Nightclubs

- 4.26 The value of the nightclub market is around £2 billion in 2014 with around 7,000 businesses (source: IBIS World), about one per 8,500 people. Legislation that has extended licensing hours for other drinking establishments and banned smoking indoors in public buildings has removed the industry's main competitive advantage. Nightclubs have also come under pressure from the economic downturn.
- 4.27 The household survey results indicated that 12.3% of households in the study area visit nightclubs and 43.1% of these households last visited a nightclub in Coventry. There are 15 nightclubs in Coventry. The existing provision is reasonably good, and this along with the large nightclubs located in Birmingham may limit the potential for additional large nightclubs in Coventry City, however smaller facilities may be viable.

Other Services, Restaurants, Bars and Takeaways

- 4.28 Service uses perform an important role in the overall offer of a centre, and encourage customers to shop locally. The service uses are categorised as follows:
- **Class A1 services** cover a range of uses, including hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as Class A3), funeral parlours and post offices.
 - **Class A2 services** include banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies.
 - **Class A3/A5** includes restaurants, cafés (A3) and takeaways (A5).
 - **Class A4** pubs/bars (Class A4).
- 4.29 Food and beverages is a fast moving and creative sector, with a steady flow of new concepts emerging. Within this sector there has been a significant increase in the number of national multiple chains. These national chains have sought to increase their geographical coverage. These types of food and drink operators (Class A3 and A4) i.e. restaurants, bars and pubs have supported other major leisure uses, in particular cinema developments. Within town centres the demand has increased, including a significant expansion in the number of coffee shops, such as Starbucks, Costa Coffee and Coffee Republic.
- 4.30 National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed restaurants have also expanded rapidly. The key categories for food and beverage offers are:
- 1 **impulse:** characterised by their produce range that is typically highly visual and hand-held so that it can be eaten “on the go”;
 - 2 **speed eating fast food:** food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector

is dominated by traditional high volume fast food offers such as burgers and fried chicken;

- 3 **refuel and relax:** a drink and snacks and a short break in a pleasant environment rather than focusing on eating a main meal; and
- 4 **casual dining/leisure dining:** incorporating a number of food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

4.31

Food and beverage establishments (Class A3, A4 and A5) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks and are important services within town and local centres. National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased significantly. A balance between Class A1 and Class A3 to A5 uses needs to be maintained. The mix of uses in the main centres in Coventry is shown in Table 4.2.

Table 4.2 Coventry Centres Use Class Mix (% of units)

	Class A1 (Retail)	Class A1 (Services)	Class A2	Class A3-A5	Class A4	Vacant
Coventry	42.8	8.6	17.0	11.7	5.1	14.8
Arena Park	59.3	14.8	7.4	18.5	0.0	0.0
Ball Hill	44.8	17.1	12.4	15.2	1.0	9.5
Cannon Park	51.3	18.9	2.7	5.4	0.0	21.6
Bell Green	50.0	4.5	4.5	11.4	0.0	29.5
Brade Drive	66.7	33.3	0.0	0.0	0.0	0.0
Brandon Road	29.6	3.7	0.0	3.7	0.0	63.0
Daventry Road	53.1	17.0	14.9	8.5	0.0	6.4
Earlsdon	50.9	11.9	11.9	16.9	8.5	0.0
Foleshill	45.6	10.1	19.0	13.9	1.3	10.1
Jardine Crescent	50.0	20.0	5.0	15.0	0.0	10.0
Jubilee Crescent	53.9	12.8	15.4	15.4	0.0	2.6
UK Average	44.1	14.1	12.1	14.7	2.9	12.1

Source: Experian Goad, Coventry City Council Land Use Survey 2013

Food and Beverage Expenditure

4.32

Experian's latest 2012 local expenditure figures have been adopted. Food and beverage expenditure per capita projections are shown in Table 1, Appendix 5. These figures indicate that the average expenditure in the study area for food and beverage consumed away from the home plus takeaways eaten at home is £953 per capita in 2014. The total food and beverage expenditure in the study area is £465.73 million.

4.33

Food and beverage expenditure per capita is expected to increase in real terms (excluding inflation) by 27% between 2014 and 2031. Taking into account population growth, total food and beverage expenditure within the

study area is expected to increase from £465.73 million in 2014 to £667.33 million in 2031, an increase of about 43% (Table 2, Appendix 5).

Food and Beverage Expenditure Patterns

- 4.34 Existing food and beverage expenditure patterns have been modelled based on the household survey results within the study area zones. Base year (2014) penetration rates are shown in Table 3, Appendix 5 and expenditure patterns are shown in Table 4. The estimated expenditure currently attracted to facilities within Coventry City is £204.22 million in 2014. The retention rate is reasonable across the inner catchment area (Zones 1-4), ranging from 60.5% to 67.7%. Coventry City attracts much lower proportions from the outer catchment area. There is some potential to increase market share in the future. We understand redevelopment proposal within the City Centre will significantly enhance the food and beverage offer, which should help to increase Coventry's market share of expenditure.

Future Food and Beverage Capacity

- 4.35 The household survey suggests that Coventry's retention of food and beverage expenditure is reasonable, but there is potential to increase the City Centre's market share. An appropriate strategy is to seek to maintain existing market shares as a minimum, but development in the City Centre should help to increase market shares.
- 4.36 Table 5 in Appendix 5 sets out adjusted future market shares that take into account planned development within Coventry City Centre. Available food and beverage expenditure has been projected forward to 2031, based on the adjusted market shares, as shown in Tables 6 to 9. Existing facilities are expected to increase their turnover by 1% per annum. Future available expenditure is compared with the projected turnover of existing facilities in Table 10 in Appendix 5.
- 4.37 Surplus expenditure has been converted into floorspace projections in Table 11, Appendix 5, using an average sales density of £5,000 per sq.m, inflated by 1% per annum. The floorspace projections are broken down in Table 4.3 below.

Table 4.3 Food and Beverage Floorspace Projections

Area	Floorspace (sq.m gross)				
	2014 to 2017	2017 to 2021	2021 to 2026	2026 to 2031	Total
Coventry City Centre	5,897	1,138	1,464	1,510	10,009
Major District Centres/ District Centres	0	142	572	591	1,305
Other Coventry	0	5	650	670	1,325
Total	5,897	1,285	2,686	2,771	12,639

- 4.38 These floorspace projections do not take into account development commitments within Coventry City Centre, which are expected to include a significant element of food and beverage floorspace. When the content of City Centre development is clearer the amount of food and beverage floorspace will need to be subtracted from the figures in Table 4.3.

Other Class A1 and A2 Service Uses

- 4.39 The retail, food and beverage floorspace projections do not include non-retail Class A1 services or Class A2 services. Based on the Goad national average, one would expect around 20% of shop premises to be occupied by these uses within centres, or about 10% of total floorspace.
- 4.40 The provision of Class A1/A2 service uses in Coventry's centres is generally relatively similar to the national average, and development should provide around 10% of floorspace for these uses. In total around 7,500 sq.m gross of Class A1/A2 services could be provided in the City by 2031, 10% over and above 67,900 sq.m gross of retail and food/beverage floorspace.

Conclusions

- 4.41 It is important to maintain a reasonable proportion of leisure and service uses in Coventry and additional floorspace should be provided over the plan period.
- 4.42 The commercial leisure assessment in this sections suggests:
- 1 There is potential for Coventry City to increase its market share of cinema trips. Population growth and an uplift in market shares could support an additional cinema;
 - 2 there could be scope for about two additional health and fitness clubs in Coventry City over the study period;
 - 3 there is no quantitative need for additional theatre facilities, tenpin bowling, bingo or nightclubs in Coventry City over the study period. However qualitative improvements should not be discouraged within designated centres;
 - 4 There is potential for Coventry City Centre to increase its market share of food and beverage expenditure. Population growth and an uplift in market shares could support an additional 12,600 sq.m gross of food and beverage floorspace over the study period to 2031. A significant element of this projection is likely to be accommodated within development proposals within the City Centre.

5.0

Accommodating Growth

Introduction

- 5.1 The National Planning Policy Framework (NPPF) indicates (paragraph 23) that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres. The need for development should be met in full and should not be compromised by limited site supply. In order to accommodate growth local planning authorities should assess the need to expand town centres to ensure a sufficient supply of suitable sites. NPPF (paragraphs 23 and 24) indicates local planning authorities should apply a sequential approach for development.
- 5.2 The National Planning Policy Guidance (PPG) indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a development plan lifetime view. Plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through expanding centres, with the sequential test to be followed.
- 5.3 The PPG acknowledges that not all successful town centre regeneration projects are retail-led, or will involve significant new developments. Public realm, transport and accessibility improvements can play important roles. Town centre car parking strategies, in a move away from resisting parking in town centres, are to encourage improvements to both the quality and quantity of car parking provision, where required to enhance the performance of town centres.

Floorspace Projections

- 5.4 The floorspace projections set out in the previous sections assume that new shopping facilities within Coventry can maintain their current market share of expenditure within the study area, recognising that other competing centres will improve in the future. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:
- major retail developments in competing centres;
 - the re-occupation of vacant retail floorspace;
 - the availability of land to accommodate new development;
 - the reliability of long term expenditure projections;
 - the effect of internet/home shopping on the demand for retail property;
 - the level of operator demand for floorspace in Coventry;
 - the need for qualitative improvements within some centres;
 - the likelihood that Coventry's existing market share of expenditure will change in the future in the face of increasing competition; and

- the potential impact new development may have on existing centres.

- 5.5 The PPG suggests town centre strategies should plan for a 3-5 year period, but the longer term plan period should be considered. Projections up to 2021 are realistic and are based on up to date forecasts, which take into account the effects of the recession. The long term floorspace projections (up to 2026 and beyond) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development management decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review.
- 5.6 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. The impact of internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and internet services utilise existing stores rather than warehouses, for example Tesco Direct. Growth in internet sales will not always reduce the demand for shop floorspace. In addition, some of the growth in internet sales may divert trade away from mail order companies rather than retail operators. Overall the long term impact of home shopping on expenditure projections is uncertain.
- 5.7 The quantitative and qualitative assessment of the potential for new retail floorspace within the previous sections suggests there is scope for new retail development within Coventry during the Plan period (to 2031). This section examines the opportunities for accommodating this projected growth and assesses potential to accommodate this floorspace.
- 5.8 The projections up to 2031 suggest there is scope for 15,509 sq.m gross of convenience goods floorspace, 39,779 sq.m gross of comparison goods floorspace (over and above commitments), 12,639 sq.m gross of Class A3 to A5 space and 7,500 sq.m gross of Class A1/A2 services. In total around 75,400 sq.m gross could be required by 2031, adopting the baseline projections.
- 5.9 The comparison goods floorspace projection includes around 11,800 sq.m gross of bulky goods retail warehouse provision, assuming bulky goods retail warehouses attract the same share of expenditure in the future.

Assessment of Opportunities

- 5.10 The sequential approach suggests that designated town centres should be the first choice for retail and leisure development.
- 5.11 The existing stock of premises will have a role to play in accommodating projected growth, during the economic recovery. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. For comparison goods, a growth rate of 2% per annum is assumed. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.
- 5.12 There are currently 146 vacant shop units within Coventry's main centres (the city centre, major district centres and district centres), which equates to an overall vacancy rate of 13.8%, which is higher than the Goad national average (12.1%). Given the existing high levels of vacant floorspace (about 29,300 sq.m gross) within some centres, it is realistic to plan to achieve at least some reduction in vacancy rates.
- 5.13 Vacant premises should help to accommodate growth. For example, if the current vacancy level fell to 8% in each centre, i.e. the pre-recession national average, then the number of reoccupied units would be 68, which could accommodate about 15,300 sq.m gross of Class A1 to A5 retail space. There is also around 4,900 sq.m gross of vacant retail warehouse floorspace within retail parks, which should be reoccupied, provided there is not adverse impact on designated centres, e.g. if proposals seek to removed restrictive planning conditions.
- 5.14 Based on existing vacancy levels, this potential re-occupied space could be distributed as follows.
- | | |
|--|--------------------------|
| • Coventry City Centre | 9,600 sq.m gross* |
| • Ball Hill | 100 sq.m gross |
| • Cannon Park | 600 sq.m gross |
| • Bell Green | 700 sq.m gross |
| • Brandon Road
(Warwickshire Shopping Park) | 4,200 sq.m gross |
| • Foleshill | 100 sq.m gross |
| • Retail warehouse parks | 4,900 sq.m gross |
| • Total | 20,200 sq.m gross |
- * some vacant units within the City centre will be part of the Coventry City South redevelopment, therefore the floorspace figure above should be viewed as a maximum.
- 5.15 If this reduction in vacant units can be achieved then the overall retail floorspace projection up to 2031 would reduce from 75,400 sq.m gross to 55,200 sq.m gross. Vacant units could accommodate 27% of the projected growth up to 2031. The short term priority should be the reoccupation of vacant

floorspace, but this should not preclude investment within appropriate town centre locations.

Potential Development Opportunities

- 5.16 The 2006 Study identified a list of 17 potential development sites (town and edge of centre), of which nine were in the city centre and eight were in the district centres. The development potential of these sites was assessed in 2006 and 15 sites were identified as having 'good' or 'reasonable' potential for retail and/or leisure uses. Key changes relating to the potential availability of sites since the 2006 study are summarised below.

Coventry City Centre

- 5.17 Based on uplifted market shares, the projections suggest Coventry City Centre should accommodate at least 34,900 sq.m gross of Class A1 to A5 floorspace (excluding convenience goods retailing). The projection for city wide non-bulky retail warehouse comparison floorspace is 2,700 sq.m gross, which should also be directed to the city centre, consistent with the sequential approach. The floorspace projection for the City Centre up to 2031 is around 37,600 sq.m gross.
- 5.18 This projection is broken down as follows:
- | | | |
|---|-------------------------|--------------------|
| 1 | Comparison goods retail | 25,300 sq.m gross; |
| 2 | Class A2 | 2,300 sq.m gross; |
| 3 | Class A3 to A5 | 10,000 sq.m gross |
- 5.19 The floorspace projections in this report assume the City Centre South Development will provide around 10,000 sq.m gross of comparison retail floorspace (increase over and above existing space allowing for demolished space). On this basis this development would accommodate 40% of the overall comparison floorspace projection for the City Centre up to 2031. A 10,000 sq.m gross increase would absorb projected growth in comparison goods expenditure up to and beyond 2021. The outline planning permission assumes a floorspace range therefore the net increase could change
- 5.20 City Centre South Development will also accommodate a significant element of Class A3 to A5 floorspace, probably over 7,000 sq.m gross. Vacant shop floorspace in the City Centre (9,600 sq.m gross in total) should be capable of accommodating the Class A2 floorspace projection (2,300 sq.m gross) and some of the residual Class A3 to A5 projection.
- 5.21 In the longer term between 2021 and 2031 there is likely to be residual capacity for potential for 15,300 sq.m gross of comparison goods floorspace in the City Centre.
- 5.22 Eight potential development sites were identified in the city centre in 2006, with reasonable or good development prospects, as follows:
- **CC1:** Wheatley Street Bus Garage up to 6,000 sq.m gross;

- **CC2:** Land at Lower Ford St. up to 1,000 sq.m gross;
- **CC3:** Land south of Hales St. up to 1,500 sq.m gross;
- **CC4:** Land at Tower St./Bishop St. up to 3,000 sq.m gross;
- **CC6:** Land north of Corporation St. up to 5,000 sq.m gross;
- **CC7:** Land west of Smithford Way up to 8,000 sq.m gross;
- **CC8:** Barracks up to 20,000 sq.m gross; and
- **CC9:** Railway Station Environs up to 1,000 sq.m gross.

- 5.23 The Barracks area is now part of the Coventry City South Development that has outline planning permission, and as indicated above this has been taken into account. This development should be the short/medium term priority up to 2021.
- 5.24 Land at Tower Street/Bishop Street (CC4 – now known as Bishopgate Retail Park) has been the subject to proposals to development a large food store since 2006, but this is unlikely to be implemented. The site is currently being marketed for three large format retail stores totalling 4,600 sq.m gross, with 185 surface car parking spaces. Redevelopment has commenced in the Railway Station Environs area (CC9).
- 5.25 The redevelopment potential of CC6 and CC7 has been explored but no firm proposals have emerged, which may be due to the effects of the recession. These two opportunities still provide the best prospects for securing retail investment within the City Centre after 2021.
- 5.26 CC4, CC6 and CC7 could accommodate over 15,000 sq.m gross of Class A1 to A5 floorspace. These sites could accommodate longer term residual capacity for comparison goods floorspace in the City Centre, over and above the Coventry City South Development.

District and Local Centres

- 5.27 Based on adjusted market shares, the projections suggest District and Local Centres could accommodate about 13,100 sq.m gross of Class A1 to A5 floorspace (excluding convenience goods retailing).
- 5.28 As indicated above, the reoccupation of vacant units in these centres could accommodate about 5,700 sq.m gross of Class A1 to A5 floorspace, in particular new vacant units at Brandon Road (4,200 sq.m gross). This vacant space should be capable of accommodating growth in the short to medium term (up to 2021).
- 5.29 Occupation of vacant space at Brandon Road (Warwickshire Shopping Park) should be the priority in the short term. There are 17 units vacant ranging in size from 61 to 945 sq.m gross. These units are modern with excellent servicing and convenient surface car parking. The agent's marketing details suggest 6 of these vacant units (totalling over 2,300 sq.m gross) are under offer or in negotiation with tenants. With an improving retail market there is no

reason to assume this vacant floorspace will not be occupied in the short term (by 2017 at the latest).

- 5.30 In the longer term (after 2021) there is potential for about 7,400 sq.m gross to be accommodated within new development. If this cannot be accommodated within district centres then the retail capacity should be directed to the City Centre. Small scale development within the district centres could be promoted to meet longer term projections.
- 5.31 Seven potential development sites were identified in the district centres with reasonable or good development prospects. Two opportunities are no longer available and the five remaining are:
- **MDC1:** Green Garage, Ball Hill about 1,000 sq.m gross;
 - **MDC2:** Arena Park over 10,000 sq.m gross;
 - **DC2:** Brade Drive Car Park about 2,000 sq.m gross;
 - **DC3:** Land adj. Brandon Road about 9,000 sq.m gross; and
 - **DC4:** Brandon Road Car Park up to 1,000 sq.m gross.
- 5.32 Additional units have been provided at Arena Park (MDC2), but a large site remains vacant adjacent to the stadium. Arena Park already has a large critical mass of retail floorspace and further retail expansion would compete rather than complement the City Centre. DC3 has now been implemented i.e. Warwickshire Shopping Park but there are vacant units available.
- 5.33 Some small scale expansion at Brade Drive (DC2) to provide a more diverse district centre should be the priority, for example small units to accommodate non-retail services to broaden the function of the District Centre. MDC1 and DC4 could also accommodate growth.

Retail Warehouse Parks

- 5.34 Based on adjusted market shares, the projections suggest bulky goods retail warehouses could accommodate about 13,900 sq.m gross of comparison goods floorspace, over and above planning permission for bulky goods retail warehouse floorspace at Blue Ribbon Park, Phoenix Way. As indicated above, vacant retail warehouse units could accommodate about 4,900 sq.m gross, which should be sufficient to meet growth up to and beyond 2021.
- 5.35 Subject to long term projections (beyond 2021), there could be scope for a further 9,000 sq.m gross of bulky goods retail warehousing by 2031. Consistent with the sequential approach this additional floorspace should (if possible) be accommodated within the designated centres in Coventry.

6.0

Recommendations and Conclusions

Introduction

6.1

This report provides an update of the City wide needs assessment for retail and commercial leisure development in Coventry. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs in Coventry City

6.2

The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over the plan period up to 2031.

6.3

When planning for growth in their centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

6.4

Long term forecasts up to and beyond 2026 may be more susceptible to change, due to unforeseen circumstances. Long term projections should be monitored and kept under review. The implications of major retail development within and surrounding Coventry City should be monitored along with the effect proposals may have on the demand for additional development in Coventry.

Floorspace Projections

6.5

The convenience goods projections, based on constant markets shares and baseline population projections, suggest new floorspace is as follows:

Table 6.1: Convenience Goods Retail Floorspace Projections (Gross)

Location	Additional Convenience Retail Floorspace (sq.m gross)			
	2014 - 2021	2021 - 2026	2026 - 2031	Total 2014 - 2031
Coventry South East	n/a	106	1,359	1,465
Coventry North West	2,582	648	682	3,912
Coventry North East	n/a	n/a	n/a	n/a
Coventry South West	7,484	1,730	1,818	11,032
Total	10,066	2,484	3,859	16,409

Source: Table 12, Appendix 2

6.6

The projections in Table 6.1 assume an even distribution of population growth within the four Coventry quadrants. If major urban extensions are proposed to accommodate population growth then the distribution of floorspace could change. Major new residential developments will require new local shopping facilities, and a high proportion of the projected convenience goods floorspace

could be accommodated within new district and local centres to serve new residents.

6.7 The convenience floorspace capacity figures assumes food stores trade at company average turnover levels across the City. In reality there may not be operator demand to build this level of floorspace. Food store operators may require higher than company average turnover levels to make new food stores in Coventry viable, therefore the floorspace projections should be viewed as a maximum requirement. The development plan process should seek the views of main food operators to quantify their likely requirement to develop new stores.

6.8 The comparison goods projections (over and above commitments), based on adjusted markets shares and baseline population projections, suggest new floorspace could be distributed as follows:

Table 6.2: Comparison Goods Retail Floorspace Projections (Gross)

Location	Additional Comparison Retail Floorspace (sq.m gross)			
	2014 - 2021	2021 - 2026	2026 - 2031	Total 2014 - 2031
City Centre	0*	6,240	9,079	15,319
District/Local centres	2,872	3,699	3,990	10,561
Bulky retail warehouses	192	6,594	7,113	13,899
Total	3,064	16,533	20,182	39,779

Source: Table 13, Appendix 3

* no requirement up to 2021 due implementation of +10,000 sq.m gross at Coventry City South.

6.9 The Class A3/A5 food/beverage services projections, suggest new floorspace could be distributed as follows:

Table 6.3: Class A3/A5 Floorspace Projections (Gross)

Location	Additional Class A3/A5 Floorspace (sq.m gross)			
	2014 - 2021	2021 - 2026	2026 - 2031	Total 2014 - 2031
Coventry city centre	7,035	1,464	1,510	10,009
District centres	142	572	591	1,305
Other Coventry	5	650	670	1,325
Total	7,182	2,686	2,771	12,639

Source: Table 13 Appendix 5

6.10 In addition to the Class A3 to A5 floorspace projections shown in Table 6.3, there could be scope for a further 7,500 sq.m gross of Class A1/A2 non-retail service floorspace in Coventry by 2031.

Strategy Recommendations

6.11 In the short to medium term (up to 2021), the priority should be the implementation of the Coventry City South Development. In other centres and

where relevant within the City Centre the reoccupation of vacant retail floorspace, in particular at Brandon Road (Warwickshire Shopping Park) should be encouraged.

- 6.12 In the longer term (after 2021) land west of Smithford Way and land north of Corporation Street could accommodate the residual need for further Class A1 to A5.
- 6.13 Brade Drive has potential for small scale expansion in the short term but not to the detriment of the City Centre or other higher order centres.
- 6.14 Local planning authorities should set out a vision and strategy for the pattern and hierarchy of centres, including town, district and local centres within their area. This strategy should set out how the role of different centres will contribute to the overall vision for their area.
- 6.15 Coventry City Centre is the main comparison shopping destination and the main focus for employment, leisure, entertainment and cultural activities. However investment within the city centre has not kept pace with development within district centres and retail parks.
- 6.16 As the main centre Coventry City Centre should compete with other large regional/sub-regional centres, such as Birmingham and Leicester. The defined Major District Centres should continue to complement the City Centre by providing for bulk convenience food shopping and a range of comparison shopping facilities and other services. The District Centres should also continue to cater for bulk convenience shopping and services, but a more limited range of comparison shopping. Below the district centres, designated local shopping centres and parades should continue to serve small localised catchment areas, providing coverage across the City.
- 6.17 In contrast to previous national policy, the NPPF does not require development to be appropriate in terms of scale and the catchment area the centre serves. Development within or on the edge of centres does not have to be consistent in terms of scale and nature with the character and role of the nearest centre.
- 6.18 The distinction between town, district and local centres is no longer important when applying the sequential approach. The designation of centre boundaries and primary shopping areas within these boundaries are more important issues, as they define whether sites are within centre, edge-of-centre or out-of-centre.
- 6.19 Future development plan policies in Coventry should continue to clearly define which centres are district or local centres and identity the boundaries of centres.
- 6.20 Arena Park Major District Centre is much larger than the other Major District and District Centres in terms of retail floorspace. Ball Hill Major District Centre is smaller than Arena Park and Cannon Park, and is not anchored by a large food superstore. Ball Hill's catchment area is not as extensive as the other Major District Centres. Ball Hill is not dissimilar in character to some of the

larger District Centres and could be re-classified. Brandon Road (Warwickshire Shopping Park) has the potential to become a Major District Centre when it is fully occupied.

- 6.21 The future designation of Brade Drive as a District Centre should be reconsidered if proposals do not emerge to enable it to function as a district centre, i.e. a better range of facilities including non-retail services.

Future Strategy Implementation and Monitoring

- 6.22 There are a number of broad areas of possible action the Council could pursue in order to maintain and enhance the role of shopping centres within Coventry, as follows:

- application of guidance within the NPPF, particularly relating to the sequential approach and impact tests for locally set thresholds in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
- improving the range and choice of shops and services in all centres (where appropriate in terms of scale) by encouraging intensification, development and the re-occupation of vacant premises, and continuing to promote the centres;
- maintaining, or improving where necessary, the generally high quality environment within each centre; and
- bring forward development opportunities through the Local Plan process to improve the availability of modern premises suitable for new occupiers.

- 6.23 These actions have particular regard to the need to reoccupy vacant units and ensure future investments are focused on the designated centres to help improve quantitative and qualitative provision throughout the city, and in the case of the City Centre in particular help grow its market share.

- 6.24 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development in the short – medium term up to 2021, with longer term forecast up to 2026 and 2031. Projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available, in particular longer-term projections up to 2031 should be treated with caution.

- 6.25 Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:
- population projections;
 - local expenditure estimates (information from Experian or other recognised data providers);

- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities; and
- implemented development within and around the study area.

6.26

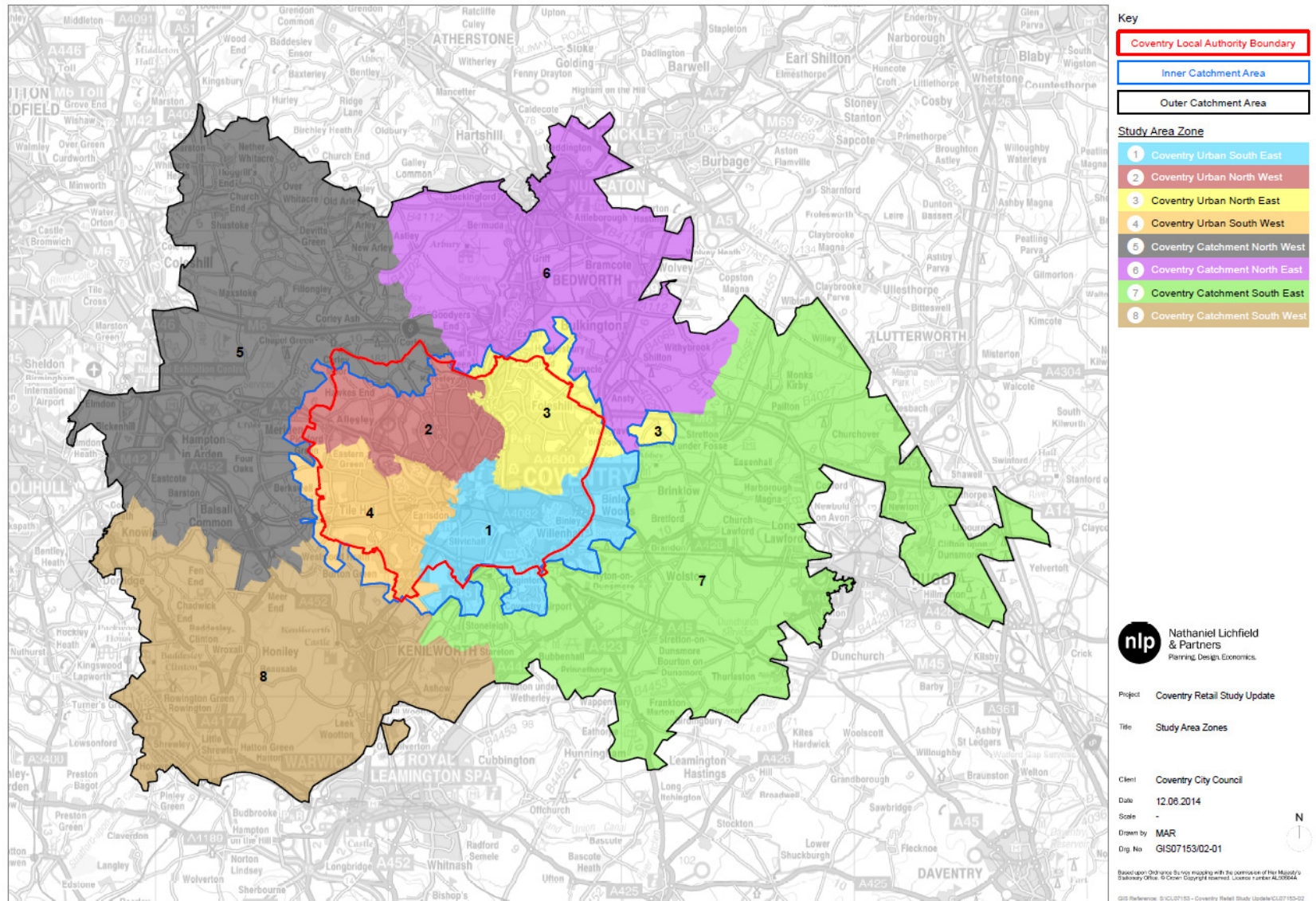
These key inputs into the retail capacity assessment can be amended to provide revised capacity projections.

Appendix 1 Study Area and Methodology

Coventry Study Area Zones

Zone	Zone Name	Postcode Sectors
Inner Catchment Area		
1	Coventry Urban South East	CV1 1, CV1 2, CV1 5 CV3 1, CV3 2, CV3 3, CV3 4, CV3 5, CV3 6
2	Coventry Urban North West	CV1 4 CV5 9 CV6 1, CV6 2, CV6 3, CV6 4, CV6 5
3	Coventry Urban North East	CV2 1, CV2 2, CV2 3, CV2 4, CV2 5 CV6 6, CV6 7
4	Coventry Urban South West	CV1 3 CV4 7, CV4 8, CV4 9 CV5 6, CV5 7, CV5 8
Outer Catchment Area		
5	Coventry Catchment North West	B46 2, B92 0 CV7 7, CV7 8
6	Coventry Catchment North East	CV7 9 CV10 7, CV10 8 CV11 4, CV11 6 CV12 0, CV12 8, CV12 9
7	Coventry Catchment South East	CV8 3 CV22 7 CV23 0, CV23 9
8	Coventry Catchment South West	B93 0 CV8 1, CV8 2 CV35 7

Plan 1 Study Area



Retail Capacity Assessment – Methodology and Data

Price Base

- 1 All monetary values expressed in this study are at 2012 prices, consistent with Experian's base year expenditure figures for 2012 (Retail Planner Briefing Note 11, October 2013) which is the most up to date information available.

Study Area

- 2 Having reviewed the previous zones used for the 2006 Study, the zones have been redrawn and the study area reduced in size. The study area has been sub-divided into eight zones, based on postcode sectors, as shown above. The redrawn zones better reflect the extent of Coventry's primary catchment area. The inner catchment area (Zones 1-4) primarily comprises the Coventry City Council area.

Retail Expenditure

- 3 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2012 have been obtained.
- 4 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 11) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.
- 5 Experian's EBS growth forecast rates for 2012 to 2015 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: -0.6% for 2012-2013, -0.3% for 2013 to 2014 and +0.1% for 2014 to 2015; for comparison goods: 3.2% for 2012-2013, 2.3% for 2013-2014 and 2.8% for 2014-2015).
- 6 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted i.e. 0.8% per annum for convenience goods after 2015 and 2.9% per annum growth for comparison goods. These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

- 7 Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2012 is:
- 7% of convenience goods expenditure; and
 - 14% of comparison goods expenditure.
- 8 Experian predicts that these figures will increase in the future. However, Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2012 are:
- 2.1% of convenience goods expenditure; and
 - 10.5% of comparison goods expenditure.
- 9 The projections provided by Experian suggest that these percentages could increase to 4% and 15.1% by 2019 respectively, and estimated at 5.9% and 15.9% by 2024. These figures have been adopted in this assessment.
- 10 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.
- 11 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector, but Experian's projections suggest this growth will level off by 2020.
- 12 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales

may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

Market Shares/Penetration Rates

- 13 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the June 2014 household survey.
- 14 The total turnover of shops within the City is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Verdict (UK Food and Grocery Retailers) and Mintel Retail Rankings information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Benchmark Turnover Levels

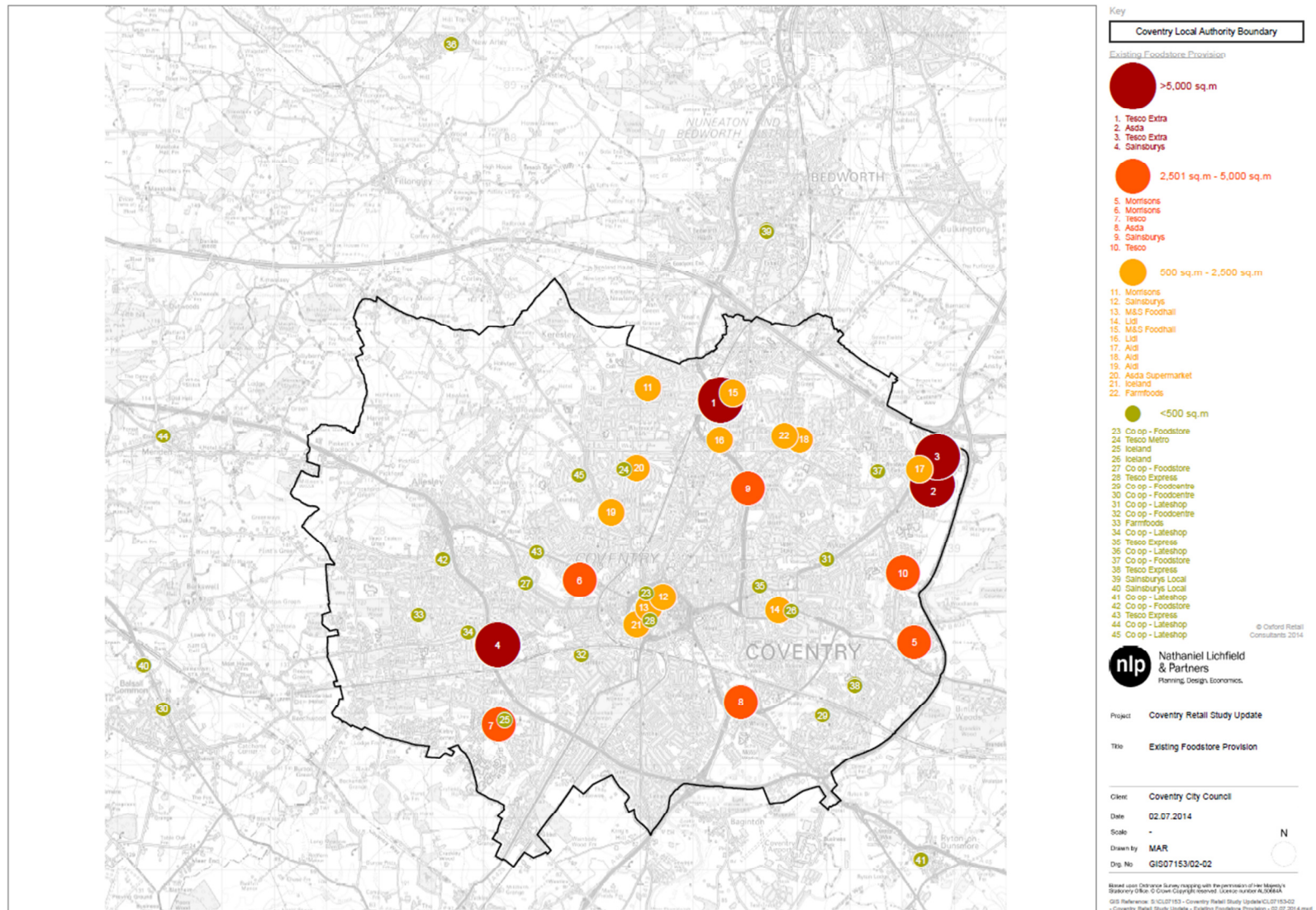
- 15 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.
- 16 The estimated convenience goods sales areas have been derived from a combination of the Institute of Oxford Retail Consultants (ORC) StorePoint database, GOAD plans, Valuation Office data and NLP estimates based on site visits. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures. Plan 2 below shows the location of existing food stores within Coventry City.
- 17 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within Coventry City and our experience of trading levels of small independent shops informed by household shopper surveys elsewhere, we have adopted an average sales density of £5,000 per sq.m net for convenience shops/stores in the study area. This is consistent with NLP's experience of retail studies across the South East and East regions. The total benchmark turnover of identified convenience sales floorspace within Coventry City is £646.01 million (Table 10, Appendix 2).

- 18 Mintel's Retail Rankings provides company average sales density information for a selection of national comparison retailers. This data suggests a notional average sales density for national high street comparison retailers of around £5,000 per sq.m net. For retail warehouse operators the average sales density is generally lower at around £2,500 per sq.m net.

Floorspace Projections (Net/Gross)

- 19 Floorspace projections are provided for net sales areas and gross floorspace. Net sales area is the area used for the sale and display of products and generally areas that are accessible to customers (excluding customer toilets). The gross area is the total floorspace of store/shops including all back-stage areas such as storage and staff accommodation.

Plan 2: Location of Existing Food Store Provision



Appendix 2 Convenience Goods Capacity

Table 1: Study Area Population - Baseline Projections

Zone	2011	2014	2017	2021	2026	2031
Zone 1 - Coventry Urban South East	81,365	83,202	85,038	87,487	90,549	93,610
Zone 2 - Coventry Urban North West	81,233	83,067	84,901	87,346	90,402	93,458
Zone 3 - Coventry Urban North East	86,340	88,289	90,238	92,837	96,085	99,334
Zone 4 - Coventry Urban South West	75,062	76,756	78,451	80,710	83,534	86,358
Zone 5 - Outer Catchment North West	25,176	25,469	25,808	26,291	26,884	27,447
Zone 6 - Outer Catchment North East	92,004	94,007	96,010	98,681	102,019	105,357
Zone 7 - Outer Catchment South East	38,595	40,112	41,630	43,653	46,182	48,710
Zone 8 - Outer Catchment South West	32,603	33,450	34,298	35,428	36,840	38,252
Total	512,378	524,352	536,373	552,432	572,494	592,526

Sources:

Experian 2011 (Census data)

Coventry and Warwickshire Joint SHMA (November 2013) Projection 1A and ONS 2012 Projections for Solihull

Table 2: Convenience Goods Expenditure per person (£)

Zone	2014	2017	2021	2026	2031
Zone 1 - Coventry Urban South East	1,687	1,702	1,737	1,798	1,862
Zone 2 - Coventry Urban North West	1,623	1,637	1,671	1,730	1,790
Zone 3 - Coventry Urban North East	1,634	1,649	1,683	1,742	1,803
Zone 4 - Coventry Urban South West	1,721	1,736	1,772	1,834	1,899
Zone 5 - Outer Catchment North West	2,179	2,198	2,244	2,323	2,404
Zone 6 - Outer Catchment North East	1,864	1,880	1,919	1,986	2,056
Zone 7 - Outer Catchment South East	1,983	2,001	2,042	2,114	2,188
Zone 8 - Outer Catchment South West	2,145	2,163	2,208	2,286	2,366

Sources:

Experian Local Expenditure 2012 (2012 prices)

Growth Rates: -0.6% 2012-2013, -0.3% 2013-2014, 0.1% 2014-2015 and 0.8% p.a. from 2015

Excludes Special Forms of Trading

Table 3: Total Convenience Goods Expenditure (£m) – Baseline Population

Zone	2014	2017	2021	2026	2031
Zone 1 - Coventry Urban South East	140.40	144.75	151.99	162.84	174.27
Zone 2 - Coventry Urban North West	134.80	138.98	145.93	156.35	167.32
Zone 3 - Coventry Urban North East	144.30	148.77	156.21	167.37	179.11
Zone 4 - Coventry Urban South West	132.11	136.21	143.02	153.23	163.98
Zone 5 - Outer Catchment North West	55.50	56.73	58.98	62.44	65.99
Zone 6 - Outer Catchment North East	175.22	180.51	189.36	202.66	216.65
Zone 7 - Outer Catchment South East	79.56	83.29	89.14	97.62	106.59
Zone 8 - Outer Catchment South West	71.73	74.19	78.22	84.20	90.50
Total	933.64	963.44	1,012.86	1,086.71	1,164.41

Source: Tables 1 and 2

Table 4: Base Year 2014 Convenience Goods Market Shares (%)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Zone 1 - Coventry South East	53.6%	10.8%	17.8%	10.4%	1.4%	1.9%	8.1%	2.9%	5.0%
Zone 2 - Coventry North West	1.3%	37.6%	1.4%	5.5%	8.2%	2.9%	1.9%	0.0%	5.0%
Zone 3 - Coventry North East	20.5%	16.3%	74.6%	3.1%	8.3%	12.4%	5.1%	0.0%	5.0%
Zone 4 - Coventry South West	20.8%	32.0%	1.5%	77.1%	17.8%	1.6%	1.6%	5.9%	5.0%
Coventry Total	96.2%	96.7%	95.3%	96.1%	35.7%	18.8%	16.7%	8.8%	
Bedworth/Nuneaton	0.2%	1.2%	3.7%	0.0%	20.4%	77.0%	0.2%	0.0%	n/a
Rugby	0.2%	0.2%	0.4%	0.5%	0.0%	0.0%	74.4%	0.8%	n/a
Kenilworth/Leamington	2.6%	0.8%	0.2%	2.5%	25.9%	1.0%	4.9%	85.5%	n/a
Solihull/Birmingham	0.5%	0.7%	0.2%	0.8%	14.7%	0.2%	0.0%	4.3%	n/a
Elsewhere	0.3%	0.4%	0.2%	0.1%	3.3%	3.0%	3.8%	0.6%	n/a
Outside Coventry Sub-Total	3.8%	3.3%	4.7%	3.9%	64.3%	81.2%	83.3%	91.2%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey June 2014

Table 5: Base Year 2014 Convenience Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2014	140.40	134.80	144.30	132.11	55.50	175.22	79.56	71.73		933.64
Zone 1 - Coventry South East	75.25	14.56	25.69	13.74	0.78	3.33	6.45	2.08	7.47	149.34
Zone 2 - Coventry North West	1.83	50.69	2.02	7.27	4.55	5.08	1.51	0.00	3.84	76.78
Zone 3 - Coventry North East	28.78	21.97	107.65	4.10	4.61	21.73	4.06	0.00	10.15	203.04
Zone 4 - Coventry South West	29.20	43.14	2.16	101.86	9.88	2.80	1.27	4.23	10.24	204.79
Coventry Total	135.06	130.36	137.52	126.96	19.81	32.94	13.29	6.31	31.70	633.96
Bedworth/Nuneaton	0.28	1.62	5.34	0.00	11.32	134.92	0.16	0.00	n/a	153.64
Rugby	0.28	0.27	0.58	0.66	0.00	0.00	59.19	0.57	n/a	61.56
Kenilworth/Leamington	3.65	1.08	0.29	3.30	14.38	1.75	3.90	61.33	n/a	89.68
Solihull/Birmingham	0.70	0.94	0.29	1.06	8.16	0.35	0.00	3.08	n/a	14.59
Elsewhere	0.42	0.54	0.29	0.13	1.83	5.26	3.02	0.43	n/a	11.92
Outside Coventry Sub-Total	5.34	4.45	6.78	5.15	35.69	142.28	66.28	65.42	n/a	331.38
TOTAL	140.40	134.80	144.30	132.11	55.50	175.22	79.57	71.73	n/a	965.35

Source: Table 3 and 4

Table 6: Convenience Goods Expenditure 2017 (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2017	144.75	138.98	148.77	136.21	56.73	180.51	83.29	74.19		963.44
Zone 1 - Coventry South East	77.59	15.01	26.48	14.17	0.79	3.43	6.75	2.15	7.70	154.08
Zone 2 - Coventry North West	1.88	52.26	2.08	7.49	4.65	5.23	1.58	0.00	3.96	79.14
Zone 3 - Coventry North East	29.67	22.65	110.98	4.22	4.71	22.38	4.25	0.00	10.47	209.34
Zone 4 - Coventry South West	30.11	44.47	2.23	105.02	10.10	2.89	1.33	4.38	10.55	211.08
Coventry Total	139.25	134.40	141.78	130.90	20.25	33.94	13.92	6.53	32.68	653.64
Bedworth/Nuneaton	0.29	1.67	5.50	0.00	11.57	139.00	0.17	0.00	n/a	158.20
Rugby	0.29	0.28	0.60	0.68	0.00	0.00	61.97	0.59	n/a	64.41
Kenilworth/Leamington	3.76	1.11	0.30	3.41	14.69	1.81	4.08	63.44	n/a	92.59
Solihull/Birmingham	0.72	0.97	0.30	1.09	8.34	0.36	0.00	3.19	n/a	14.97
Elsewhere	0.43	0.56	0.30	0.14	1.87	5.42	3.17	0.45	n/a	12.32
Outside Coventry Sub-Total	5.50	4.59	6.99	5.31	36.48	146.58	69.38	67.66	n/a	342.49
TOTAL	144.75	138.98	148.77	136.21	56.73	180.51	83.30	74.19	n/a	996.13

Source: Table 3 and 4

Table 7: Convenience Goods Expenditure 2021 (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2021	151.99	145.93	156.21	143.02	58.98	189.36	89.14	78.22		1,012.86
Zone 1 - Coventry South East	81.47	15.76	27.81	14.87	0.83	3.60	7.23	2.27	8.10	161.92
Zone 2 - Coventry North West	1.98	54.87	2.19	7.87	4.84	5.49	1.69	0.00	4.15	83.08
Zone 3 - Coventry North East	31.16	23.79	116.53	4.43	4.90	23.48	4.55	0.00	10.99	219.83
Zone 4 - Coventry South West	31.61	46.70	2.34	110.27	10.50	3.03	1.43	4.61	11.08	221.57
Coventry Total	146.21	141.12	148.87	137.44	21.06	35.60	14.90	6.88	34.32	686.40
Bedworth/Nuneaton	0.30	1.75	5.78	0.00	12.03	145.81	0.18	0.00	n/a	165.85
Rugby	0.30	0.29	0.62	0.72	0.00	0.00	66.32	0.63	n/a	68.88
Kenilworth/Leamington	3.95	1.17	0.31	3.58	15.28	1.89	4.37	66.88	n/a	97.42
Solihull/Birmingham	0.76	1.02	0.31	1.14	8.67	0.38	0.00	3.36	n/a	15.65
Elsewhere	0.46	0.58	0.31	0.14	1.95	5.68	3.39	0.47	n/a	12.98
Outside Coventry Sub-Total	5.78	4.82	7.34	5.58	37.93	153.76	74.25	71.33	n/a	360.79
TOTAL	151.99	145.93	156.21	143.02	58.98	189.36	89.15	78.22	n/a	1,047.18

Source: Table 3 and 4

Table 8: Convenience Goods Expenditure 2026 (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2026	162.84	156.35	167.37	153.23	62.44	202.66	97.62	84.20		1,086.71
Zone 1 - Coventry South East	87.28	16.89	29.79	15.94	0.87	3.85	7.92	2.44	8.68	173.66
Zone 2 - Coventry North West	2.12	58.79	2.34	8.43	5.12	5.88	1.85	0.00	4.45	88.98
Zone 3 - Coventry North East	33.38	25.49	124.86	4.75	5.18	25.13	4.98	0.00	11.78	235.54
Zone 4 - Coventry South West	33.87	50.03	2.51	118.14	11.11	3.24	1.56	4.97	11.87	237.31
Coventry Total	156.65	151.19	159.50	147.26	22.29	38.10	16.31	7.41	36.77	735.49
Bedworth/Nuneaton	0.33	1.88	6.19	0.00	12.74	156.05	0.20	0.00	n/a	177.37
Rugby	0.33	0.31	0.67	0.77	0.00	0.00	72.63	0.67	n/a	75.38
Kenilworth/Leamington	4.23	1.25	0.33	3.83	16.17	2.03	4.78	71.99	n/a	104.62
Solihull/Birmingham	0.81	1.09	0.33	1.23	9.18	0.41	0.00	3.62	n/a	16.67
Elsewhere	0.49	0.63	0.33	0.15	2.06	6.08	3.71	0.51	n/a	13.96
Outside Coventry Sub-Total	6.19	5.16	7.87	5.98	40.15	164.56	81.32	76.79	n/a	388.00
TOTAL	162.84	156.35	167.37	153.23	62.44	202.66	97.63	84.20	n/a	1,123.50

Source: Table 3 and 4

Table 9: Convenience Goods Expenditure 2031 (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2031	174.27	167.32	179.11	163.98	65.99	216.65	106.59	90.50		1,164.41
Zone 1 - Coventry South East	93.41	18.07	31.88	17.05	0.92	4.12	8.64	2.62	9.30	186.02
Zone 2 - Coventry North West	2.27	62.91	2.51	9.02	5.41	6.28	2.03	0.00	4.76	95.18
Zone 3 - Coventry North East	35.72	27.27	133.62	5.08	5.48	26.86	5.44	0.00	12.60	252.08
Zone 4 - Coventry South West	36.25	53.54	2.69	126.43	11.75	3.47	1.71	5.34	12.69	253.86
Coventry Total	167.65	161.80	170.69	157.59	23.56	40.73	17.81	7.96	39.36	787.15
Bedworth/Nuneaton	0.35	2.01	6.63	0.00	13.46	166.82	0.21	0.00	n/a	189.48
Rugby	0.35	0.33	0.72	0.82	0.00	0.00	79.30	0.72	n/a	82.25
Kenilworth/Leamington	4.53	1.34	0.36	4.10	17.09	2.17	5.22	77.38	n/a	112.18
Solihull/Birmingham	0.87	1.17	0.36	1.31	9.70	0.43	0.00	3.89	n/a	17.74
Elsewhere	0.52	0.67	0.36	0.16	2.18	6.50	4.05	0.54	n/a	14.98
Outside Coventry Sub-Total	6.62	5.52	8.42	6.40	42.43	175.92	88.79	82.54	n/a	416.63
TOTAL	174.27	167.32	179.11	163.98	65.99	216.65	106.60	90.50	n/a	1,203.77

Source: Table 3 and 4

Table 10: Convenience Goods Floorspace and Benchmark Turnover 2014

Zone	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover Density (£ per sq.m)	Total Turnover (£m)
Zone 1	Asda, Abbey Park, London Road	3,094	85%	2,630	£13,418	£35.29
South East	Co-op, Corporation St, City Centre	471	98%	462	£7,661	£3.54
Coventry	Iceland, Queen Victoria Rd, City Centre	579	95%	550	£7,295	£4.01
	Sainsbury's, Trinity Street	2,113	85%	1,796	£13,619	£24.46
	Tesco Express, City Centre	380	98%	372	£11,080	£4.13
	Other City Centre	3,500	100%	3,500	£5,000	£17.50
	Co-op, Remembrance Road, Willenhall	356	98%	349	£7,661	£2.67
	Iceland, Binley Road	447	95%	425	£7,295	£3.10
	Lidl, Binley Road	1,020	80%	816	£3,138	£2.56
	Marks & Spencer, City Centre	1,347	100%	1,347	£11,253	£15.16
	Morrisons, Skipworth Rd, Binley (Brandon Rd)	3,643	85%	3,097	£12,649	£39.17
	Tesco Express, Quorn Way, Binley	213	98%	209	£11,080	£2.31
	Marks & Spencer Simply Food, Brandon Road	800	95%	760	£11,253	£8.55
	Daventry Rd District Centre	450	100%	450	£5,000	£2.25
	Local Parades in Zone 1	1,600	100%	1,600	£5,000	£8.00
	Sub-Total	20,013		18,362		£172.70
Zone 2	Aldi, Radford Road, Brade Drive	715	80%	572	£8,116	£4.64
North West	Asda, Jubilee Crescent	707	90%	636	£13,418	£8.54
Coventry	Co-op, Norman Place	39	98%	38	£7,661	£0.29
	Lidl, John Wigley Way	890	80%	712	£3,138	£2.23
	Morrisons, Parkgate Rd	2,333	85%	1,983	£12,649	£25.08
	Tesco Metro, Jubilee Crescent	455	95%	432	£11,080	£4.79
	Foleshill District Centre	1,100	100%	1,100	£5,000	£5.50
	Jubilee Crescent District Centre	400	100%	400	£5,000	£2.00
	Local Parades in Zone 2	1,300	100%	1,300	£5,000	£6.50
	Sub-Total	7,939		7,174		£59.58
Zone 3	Aldi, Hinckley Road	829	95%	788	£8,116	£6.39
North East	Aldi, Roseberry Ave, Bell Green	722	80%	578	£8,116	£4.69
Coventry	Asda, Brade Drive, Walsgrave	6,884	60%	4,130	£13,418	£55.42
	Co-op, Ansty Road, Wyken	329	98%	322	£7,661	£2.47
	Co-op, Woodley Lane	221	98%	217	£7,661	£1.66
	Farmfoods, Riley Sq. Tile Hill	511	98%	501	£7,000	£3.51
	Marks & Spencer, Arena Park	977	100%	977	£11,253	£10.99
	Sainsbury's, Austin Drive	3,093	92%	2,846	£13,619	£38.75
	Tesco Express, Walsgrave Road, Ball Hill	263	95%	250	£11,080	£2.77
	Tesco Extra, Crosspoint Retail Park	5,985	65%	4,268	£11,080	£47.29
	Tesco Extra, Longford Rd, Arena Park	8,547	53%	4,530	£11,080	£50.19
	Tesco, Clifford Bridge Rd, Walgrave	2,627	85%	2,233	£11,080	£24.74
	Other Arena Park Major District Centre	80	100%	80	£5,000	£0.40
	Other Ball Hill Major District Centre	700	100%	700	£5,000	£3.50
	Other Bell Green District Centre	500	100%	500	£5,000	£2.50
	Local Parades in Zone 3	1,000	100%	1,000	£5,000	£5.00
	Sub-Total	33,268		23,919		£260.27
Zone 4	Co-op, Sutherland Avenue	163	98%	160	£7,661	£1.22
South West	Co-op, Allesley Old Rd	442	90%	398	£7,661	£3.05
Coventry	Co-op, Earlsdon St, Earlsdon	526	90%	473	£7,661	£3.63
	Co-op, Tile Hill Lane	266	98%	261	£7,661	£2.00
	Farmfoods, Jardine Cr.	270	98%	265	£7,000	£1.85
	Iceland, Cannon Park	450	95%	428	£7,295	£3.12
	Morrisons, Holyhead Road	3,618	85%	3,075	£12,649	£38.90
	Sainsbury's, Fletcherampstead Hway, Canley	5,664	75%	4,248	£13,619	£57.85
	Tesco Express, Holyhead Rd	157	98%	154	£11,080	£1.70
	Tesco, Lynchgate Rd, Cannon Park,	3,126	85%	2,657	£11,080	£29.44
	Other Cannon Park Major District Centre	40	100%	40	£5,000	£0.20
	Other Earlsdon District Centre	400	100%	400	£5,000	£2.00
	Other Jardine Crescent District Centre	600	100%	600	£5,000	£3.00
	Local Parades in Zone 4	1,100	100%	1,100	£5,000	£5.50
	Sub-Total	16,822		14,258		£153.46
Coventry City Total		78,042		63,712	£10,140	£646.01

Source: ORC StorePoint 2014, VOA, Goad Plan for Coventry City Centre (September 2013), Coventry CC Land Use Survey (June 2013) and Verdict

Table 11: Summary of Convenience Goods Expenditure 2014 to 2031 - Baseline Population

Area	2014	2017	2021	2026	2031
Available Expenditure in Coventry City					
Zone 1 - Coventry South East	149.34	154.08	161.92	173.66	186.02
Zone 2 - Coventry North West	76.78	79.14	83.08	88.98	95.18
Zone 3 - Coventry North East	203.04	209.34	219.83	235.54	252.08
Zone 4 - Coventry South West	204.79	211.08	221.57	237.31	253.86
Total	633.96	653.64	686.40	735.49	787.15
Turnover of Existing Facilities (£m)					
Zone 1 - Coventry South East	172.70	172.70	172.70	172.70	172.70
Zone 2 - Coventry North West	59.58	59.58	59.58	59.58	59.58
Zone 3 - Coventry North East	260.27	260.27	260.27	260.27	260.27
Zone 4 - Coventry South West	153.46	153.46	153.46	153.46	153.46
Total	646.01	646.01	646.01	646.01	646.01
Surplus/Deficit Expenditure (£m)					
Zone 1 - Coventry South East	-23.35	-18.62	-10.77	0.97	13.33
Zone 2 - Coventry North West	17.20	19.56	23.49	29.40	35.60
Zone 3 - Coventry North East	-57.23	-50.93	-40.45	-24.73	-8.19
Zone 4 - Coventry South West	51.33	57.62	68.11	83.84	100.39
Total	-12.05	7.62	40.38	89.48	141.13

Table 12: Convenience Goods Floorspace Capacity 2014 to 2031 - Baseline Population

Area	2014	2017	2021	2026	2031
Turnover Density New Floorspace (£ per sq.m)	£13,000	£13,000	£13,000	£13,000	£13,000
Floorspace Requirement (sq.m net)					
Zone 1 - Coventry South East	-1,796	-1,432	-829	75	1,025
Zone 2 - Coventry North West	1,323	1,505	1,807	2,261	2,739
Zone 3 - Coventry North East	-4,402	-3,918	-3,111	-1,902	-630
Zone 4 - Coventry South West	3,948	4,432	5,239	6,450	7,723
Total	-927	587	3,106	6,883	10,856
Floorspace Requirement (sq.m gross)					
Zone 1 - Coventry South East	-2,566	-2,046	-1,184	106	1,465
Zone 2 - Coventry North West	1,890	2,149	2,582	3,230	3,912
Zone 3 - Coventry North East	-6,289	-5,597	-4,445	-2,718	-900
Zone 4 - Coventry South West	5,640	6,331	7,484	9,214	11,032
Total	-1,324	838	4,438	9,833	15,509

Table A: Study Area Population - Alternative Population Projections

Zone	2011	2014	2017	2021	2026	2031
Zone 1 - Coventry Urban South East	81,365	85,266	88,554	92,516	97,353	101,886
Zone 2 - Coventry Urban North West	81,233	85,127	88,410	92,366	97,195	101,720
Zone 3 - Coventry Urban North East	86,340	90,479	93,969	98,173	103,306	108,115
Zone 4 - Coventry Urban South West	75,062	78,660	81,694	85,349	89,812	93,993
Zone 5 - Outer Catchment North West	25,176	25,425	25,742	26,233	26,840	27,392
Zone 6 - Outer Catchment North East	92,004	93,276	94,853	97,109	99,782	102,134
Zone 7 - Outer Catchment South East	38,595	39,464	40,488	41,897	43,475	44,800
Zone 8 - Outer Catchment South West	32,603	33,019	33,646	34,497	35,599	36,653
Total	512,378	530,716	547,355	568,139	593,362	616,693

Source:

Experian 2011 (Census data)

ONS 2012 Projections

Table B: Summary of Convenience Goods Expenditure 2014 to 2031 - Alternative Population Projections

Area	2014	2017	2021	2026	2031
Available Expenditure in Coventry City					
Zone 1 - Coventry South East	152.55	159.59	169.96	184.86	199.97
Zone 2 - Coventry North West	78.32	81.79	86.95	94.39	101.94
Zone 3 - Coventry North East	207.03	216.21	229.87	249.56	269.51
Zone 4 - Coventry South West	209.28	218.80	232.86	253.12	273.71
Total	647.18	676.40	719.64	781.92	845.14
Turnover of Existing Facilities (£m)					
Zone 1 - Coventry South East	172.70	172.70	172.70	172.70	172.70
Zone 2 - Coventry North West	59.58	59.58	59.58	59.58	59.58
Zone 3 - Coventry North East	260.27	260.27	260.27	260.27	260.27
Zone 4 - Coventry South West	153.46	153.46	153.46	153.46	153.46
Total	646.01	646.01	646.01	646.01	646.01
Surplus/Deficit Expenditure (£m)					
Zone 1 - Coventry South East	-20.14	-13.10	-2.74	12.16	27.28
Zone 2 - Coventry North West	18.74	22.21	27.37	34.81	42.36
Zone 3 - Coventry North East	-53.24	-44.06	-30.40	-10.72	9.24
Zone 4 - Coventry South West	55.81	65.34	79.40	99.66	120.25
Total	1.17	30.38	73.62	135.91	199.12

Table C: Convenience Goods Floorspace Capacity 2014 to 2031 - Alternative Population Projections

Area	2014	2017	2021	2026	2031
Turnover Density New Floorspace (£ per sq.m)	£13,000	£13,000	£13,000	£13,000	£13,000
Floorspace Requirement (sq.m net)					
Zone 1 - Coventry South East	-1,549	-1,008	-211	935	2,098
Zone 2 - Coventry North West	1,442	1,708	2,105	2,678	3,258
Zone 3 - Coventry North East	-4,096	-3,389	-2,339	-824	711
Zone 4 - Coventry South West	4,293	5,026	6,107	7,666	9,250
Total	90	2,337	5,663	10,455	15,317
Floorspace Requirement (sq.m gross)					
Zone 1 - Coventry South East	-2,214	-1,440	-301	1,336	2,997
Zone 2 - Coventry North West	2,059	2,440	3,007	3,825	4,655
Zone 3 - Coventry North East	-5,851	-4,842	-3,341	-1,178	1,015
Zone 4 - Coventry South West	6,133	7,180	8,725	10,952	13,214
Total	128	3,339	8,090	14,935	21,882

Appendix 3 Comparison Goods Capacity

Table 1: Study Area Population - Baseline Projections

Zone	2011	2014	2017	2021	2026	2031
Zone 1 - Coventry Urban South East	81,365	83,202	85,038	87,487	90,549	93,610
Zone 2 - Coventry Urban North West	81,233	83,067	84,901	87,346	90,402	93,458
Zone 3 - Coventry Urban North East	86,340	88,289	90,238	92,837	96,085	99,334
Zone 4 - Coventry Urban South West	75,062	76,756	78,451	80,710	83,534	86,358
Zone 5 - Outer Catchment North West	25,176	25,469	25,808	26,291	26,884	27,447
Zone 6 - Outer Catchment North East	92,004	94,007	96,010	98,681	102,019	105,357
Zone 7 - Outer Catchment South East	38,595	40,112	41,630	43,653	46,182	48,710
Zone 8 - Outer Catchment South West	32,603	33,450	34,298	35,428	36,840	38,252
Total	512,378	524,352	536,373	552,432	572,494	592,526

Sources:

Experian 2011 (Census data)

Coventry and Warwickshire Joint SHMA (November 2013) Projection 1A and ONS 2012 Projections for Solihull

Table 2: Comparison Goods Expenditure per person (£)

Zone	2014	2017	2021	2026	2031
Zone 1 - Coventry Urban South East	2,165	2,298	2,520	2,900	3,342
Zone 2 - Coventry Urban North West	1,940	2,059	2,258	2,599	2,995
Zone 3 - Coventry Urban North East	1,924	2,043	2,240	2,578	2,970
Zone 4 - Coventry Urban South West	2,316	2,459	2,696	3,103	3,575
Zone 5 - Outer Catchment North West	3,123	3,314	3,634	4,183	4,819
Zone 6 - Outer Catchment North East	2,403	2,551	2,797	3,219	3,709
Zone 7 - Outer Catchment South East	2,832	3,006	3,296	3,794	4,372
Zone 8 - Outer Catchment South West	3,164	3,358	3,682	4,238	4,883

Sources:

Experian Local Expenditure 2012 (2012 prices)

Growth Rates: 3.2% 2012-2013, 2.3% 2013-2014, 2.8% 2014-2015 and 2.9% p.a. from 2015

Excludes Special Forms of Trading

Table 3: Total Comparison Goods Expenditure (£m) – Baseline Population

Zone	2014	2017	2021	2026	2031
Zone 1 - Coventry Urban South East	180.15	195.43	220.45	262.59	312.81
Zone 2 - Coventry Urban North West	161.17	174.84	197.23	234.93	279.86
Zone 3 - Coventry Urban North East	169.90	184.32	207.91	247.66	295.02
Zone 4 - Coventry Urban South West	177.80	192.88	217.57	259.17	308.73
Zone 5 - Outer Catchment North West	79.53	85.54	95.54	112.44	132.28
Zone 6 - Outer Catchment North East	225.91	244.89	275.98	328.38	390.76
Zone 7 - Outer Catchment South East	113.62	125.15	143.89	175.20	212.94
Zone 8 - Outer Catchment South West	105.83	115.17	130.44	156.11	186.78
Total	1,213.91	1,318.23	1,489.01	1,776.49	2,119.19

Source: Tables 1 and 2

Table 4: Base Year 2014 Comparison Goods Market Shares (%)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Coventry City Centre	37.0%	37.1%	34.9%	43.5%	13.7%	14.9%	12.3%	6.5%	10.0%
Arena Park MDC	3.6%	10.3%	8.9%	2.9%	5.6%	9.5%	0.2%	0.7%	10.0%
Cannon Park MDC	1.8%	0.6%	0.2%	4.8%	2.1%	0.1%	0.0%	0.7%	5.0%
District and Local Centres	14.8%	9.7%	17.6%	9.0%	1.1%	1.9%	3.4%	1.1%	5.0%
Non-Bulky Retail Warehouses	9.8%	7.9%	9.9%	6.3%	3.2%	3.0%	2.4%	2.0%	10.0%
Bulky Retail Warehouses	16.1%	18.5%	14.5%	15.5%	10.0%	6.4%	6.6%	7.2%	10.0%
Coventry City Total	83.1%	84.1%	86.0%	82.0%	35.7%	35.8%	24.9%	18.2%	
Bedworth/Nuneaton	0.9%	2.6%	3.0%	0.6%	9.3%	51.5%	0.1%	0.0%	n/a
Leicester	1.2%	0.4%	1.4%	0.4%	0.3%	3.9%	5.0%	0.0%	n/a
Rugby	0.5%	0.1%	0.5%	0.1%	0.1%	0.1%	50.1%	0.6%	n/a
Kenilworth/Leamington	6.5%	2.9%	2.1%	5.6%	8.3%	0.7%	11.0%	57.4%	n/a
Solihull/Birmingham	5.0%	8.7%	3.9%	9.5%	41.9%	3.8%	4.5%	16.9%	n/a
Elsewhere	2.8%	1.2%	3.1%	1.8%	4.4%	4.2%	4.4%	6.9%	n/a
Other Sub-Total	16.9%	15.9%	14.0%	18.0%	64.3%	64.2%	75.1%	81.8%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey June 2014

Table 5: Base Year 2014 Comparison Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2014	180.15	161.17	169.90	177.80	79.53	225.91	113.62	105.83		1,213.91
Coventry City Centre	66.65	59.79	59.30	77.34	10.90	33.66	13.97	6.88	36.50	365.00
Arena Park MDC	6.49	16.60	15.12	5.16	4.45	21.46	0.23	0.74	7.81	78.05
Cannon Park MDC	3.24	0.97	0.34	8.53	1.67	0.23	0.00	0.74	0.83	16.55
District and Local Centres	26.66	15.63	29.90	16.00	0.87	4.29	3.86	1.16	5.18	103.57
Non-Bulky Retail Warehouses	17.65	12.73	16.82	11.20	2.55	6.78	2.73	2.12	8.06	80.64
Bulky Retail Warehouses	29.00	29.82	24.64	27.56	7.95	14.46	7.50	7.62	16.51	165.05
Coventry City Total	149.70	135.55	146.12	145.79	28.39	80.88	28.29	19.26	74.88	808.86
Bedworth/Nuneaton	1.62	4.19	5.10	1.07	7.40	116.35	0.11	0.00	n/a	135.83
Leicester	2.16	0.64	2.38	0.71	0.24	8.81	5.68	0.00	n/a	20.63
Rugby	0.90	0.16	0.85	0.18	0.08	0.23	56.92	0.63	n/a	59.95
Kenilworth/Leamington	11.71	4.67	3.57	9.96	6.60	1.58	12.50	60.75	n/a	111.33
Solihull/Birmingham	9.01	14.02	6.63	16.89	33.32	8.58	5.11	17.89	n/a	111.45
Elsewhere	5.04	1.93	5.27	3.20	3.50	9.49	5.00	7.30	n/a	40.73
Other Sub-Total	30.44	25.63	23.79	32.00	51.14	145.04	85.33	86.57	n/a	479.93
TOTAL	180.15	161.17	169.90	177.80	79.53	225.91	113.62	105.83	n/a	1,288.79

Source: Table 3 and 4

Table 6: Future Comparison Goods Market Shares (%)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Coventry City Centre	38.0%	38.0%	36.0%	45.0%	14.1%	15.3%	12.6%	6.7%	10.0%
Arena Park MDC	3.6%	10.3%	8.9%	2.9%	5.6%	9.5%	0.2%	0.7%	10.0%
Cannon Park MDC	1.8%	0.6%	0.2%	4.8%	2.1%	0.1%	0.0%	0.7%	5.0%
District and Local Centres	14.8%	9.7%	17.6%	9.0%	1.1%	1.9%	3.4%	1.1%	5.0%
Non-Bulky Retail Warehouses	9.8%	7.9%	9.9%	6.3%	3.2%	3.0%	2.4%	2.0%	10.0%
Bulky Retail Warehouses	16.1%	18.5%	14.5%	15.5%	10.0%	6.4%	6.6%	7.2%	10.0%
Coventry City Total	84.1%	85.0%	87.1%	83.5%	36.1%	36.2%	25.2%	18.4%	
Elsewhere	15.9%	15.0%	12.9%	16.5%	63.9%	63.8%	74.8%	81.6%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey June 2014 with NLP uplift adjustments for Coventry City Centre

Table 7: Future 2017 Comparison Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2017	195.43	174.84	184.32	192.88	85.54	244.89	125.15	115.17		1,318.23
Coventry City Centre	74.26	66.44	66.35	86.80	12.06	37.47	15.77	7.72	40.76	407.63
Arena Park MDC	7.04	18.01	16.40	5.59	4.79	23.27	0.25	0.81	8.46	84.62
Cannon Park MDC	3.52	1.05	0.37	9.26	1.80	0.24	0.00	0.81	0.90	17.94
District and Local Centres	28.92	16.96	32.44	17.36	0.94	4.65	4.26	1.27	5.62	112.42
Non-Bulky Retail Warehouses	19.15	13.81	18.25	12.15	2.74	7.35	3.00	2.30	8.75	87.51
Bulky Retail Warehouses	31.46	32.35	26.73	29.90	8.55	15.67	8.26	8.29	17.91	179.13
Coventry City Total	164.36	148.62	160.54	161.05	30.88	88.65	31.54	21.19	82.41	889.24
Elsewhere	31.07	26.23	23.78	31.83	54.66	156.24	93.62	93.98	n/a	511.40
TOTAL	195.43	174.84	184.32	192.88	85.54	244.89	125.15	115.17	n/a	1,400.64

Source: Table 3 and 6

Table 8: Future 2021 Comparison Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2021	220.45	197.23	207.91	217.57	95.54	275.98	143.89	130.44		1,489.01
Coventry City Centre	83.77	74.95	74.85	97.91	13.47	42.22	18.13	8.74	46.00	460.04
Arena Park MDC	7.94	20.31	18.50	6.31	5.35	26.22	0.29	0.91	9.54	95.37
Cannon Park MDC	3.97	1.18	0.42	10.44	2.01	0.28	0.00	0.91	1.01	20.22
District and Local Centres	32.63	19.13	36.59	19.58	1.05	5.24	4.89	1.43	6.34	126.90
Non-Bulky Retail Warehouses	21.60	15.58	20.58	13.71	3.06	8.28	3.45	2.61	9.87	98.75
Bulky Retail Warehouses	35.49	36.49	30.15	33.72	9.55	17.66	9.50	9.39	20.22	202.17
Coventry City Total	185.40	167.64	181.09	181.67	34.49	99.90	36.26	24.00	92.99	1,003.44
Elsewhere	35.05	29.58	26.82	35.90	61.05	176.07	107.63	106.44	n/a	578.55
TOTAL	220.45	197.23	207.91	217.57	95.54	275.98	143.89	130.44	n/a	1,582.00

Source: Table 3 and 6

Table 9: Future 2026 Comparison Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2026	262.59	234.93	247.66	259.17	112.44	328.38	175.20	156.11		1,776.49
Coventry City Centre	99.79	89.27	89.16	116.63	15.85	50.24	22.08	10.46	54.83	548.30
Arena Park MDC	9.45	24.20	22.04	7.52	6.30	31.20	0.35	1.09	11.35	113.49
Cannon Park MDC	4.73	1.41	0.50	12.44	2.36	0.33	0.00	1.09	1.20	24.06
District and Local Centres	38.86	22.79	43.59	23.33	1.24	6.24	5.96	1.72	7.56	151.28
Non-Bulky Retail Warehouses	25.73	18.56	24.52	16.33	3.60	9.85	4.20	3.12	11.77	117.68
Bulky Retail Warehouses	42.28	43.46	35.91	40.17	11.24	21.02	11.56	11.24	24.10	240.98
Coventry City Total	220.84	199.69	215.71	216.40	40.59	118.87	44.15	28.72	110.81	1,195.80
Elsewhere	41.75	35.24	31.95	42.76	71.85	209.50	131.05	127.39	n/a	691.49
TOTAL	262.59	234.93	247.66	259.17	112.44	328.38	175.20	156.11	n/a	1,887.30

Source: Table 3 and 6

Table 10: Future 2031 Comparison Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2031	312.81	279.86	295.02	308.73	132.28	390.76	212.94	186.78		2,119.19
Coventry City Centre	118.87	106.35	106.21	138.93	18.65	59.79	26.83	12.51	65.35	653.49
Arena Park MDC	11.26	28.83	26.26	8.95	7.41	37.12	0.43	1.31	13.51	135.07
Cannon Park MDC	5.63	1.68	0.59	14.82	2.78	0.39	0.00	1.31	1.43	28.63
District and Local Centres	46.30	27.15	51.92	27.79	1.46	7.42	7.24	2.05	9.02	180.34
Non-Bulky Retail Warehouses	30.66	22.11	29.21	19.45	4.23	11.72	5.11	3.74	14.02	140.25
Bulky Retail Warehouses	50.36	51.77	42.78	47.85	13.23	25.01	14.05	13.45	28.72	287.23
Coventry City Total	263.08	237.88	256.97	257.79	47.75	141.46	53.66	34.37	132.05	1,425.00
Elsewhere	49.74	41.98	38.06	50.94	84.53	249.31	159.28	152.41	n/a	826.24
TOTAL	312.81	279.86	295.02	308.73	132.28	390.76	212.94	186.78	n/a	2,251.24

Source: Table 3 and 6

Table 11: Existing Comparison Goods Floorspace

Area	Gross Floorspace (sq.m)	Sales Floorspace (sq.m net)
Coventry City Centre	99,800	69,900
Arena Park MDC	22,800	13,300
Ball Hill MDC	2,900	2,000
Cannon Park MDC	4,500	3,400
District Centres	22,000	13,000
Local Centres	11,500	6,400
Non-Bulky Retail Warehouses	35,600	27,500
Bulky Retail Warehouses (incl. IKEA)	86,000	64,200
Total	285,100	199,700

Source: VOA, Goad Plan for Coventry City Centre (September 2013) and Coventry CC Land Use Survey (June 2013)

Table 12: Summary of Comparison Goods Expenditure 2014 to 2031

Centre		2014	2017	2021	2026	2031
Available Expenditure in Coventry (£m)	Coventry City Centre	365.00	407.63	460.04	548.30	653.49
	Arena Park MDC	78.05	84.62	95.37	113.49	135.07
	Cannon Park MDC	16.55	17.94	20.22	24.06	28.63
	Other District and Local Centres	103.57	112.42	126.90	151.28	180.34
	Non-Bulky Retail Warehouses	80.64	87.51	98.75	117.68	140.25
	Bulky Retail Warehouses	165.05	179.13	202.17	240.98	287.23
	Total	808.86	889.24	1,003.44	1,195.80	1,425.00
Turnover of Existing Facilities (£m)	Coventry City Centre	365.00	387.34	419.27	462.91	511.09
	Arena Park MDC	78.05	82.83	89.66	98.99	109.29
	Cannon Park MDC	16.55	17.56	19.01	20.99	23.17
	Other District and Local Centres	103.57	109.91	118.97	131.36	145.03
	Non-Bulky Retail Warehouses	80.64	85.57	92.63	102.27	112.91
	Bulky Retail Warehouses	165.05	175.15	189.59	209.32	231.11
	Total	808.86	858.37	929.13	1,025.83	1,132.60
Turnover of Retail Commitments (£m)	Coventry City Centre (1)	0.00	47.75	51.69	57.07	63.01
	Arena Park MDC	0.00	0.00	0.00	0.00	0.00
	Cannon Park MDC	0.00	0.00	0.00	0.00	0.00
	Other District and Local Centres	0.00	0.00	0.00	0.00	0.00
	Non-Bulky Retail Warehouses (2)	0.00	6.00	6.49	7.17	7.92
	Bulky Retail Warehouses (3)	0.00	11.19	12.11	13.37	14.76
	Total	0.00	64.94	70.29	77.61	85.69

Source: Tables 5 to 10

(1) City Centre South Development assumed increase in comparison goods floorspace of 10,000 sq.m GIA - 7,500 sq.m net @ £6,367 per sq.m

(2) Airport Retail Park proposed B&M Bargains store 1,430 sq.m gross -1,200 sq.m net @ £5,000 per sq.m net

(3) Blue Ribbon Park unimplmented DIY store 4,867 sq.m gross -4,500 sq.m net @ £2,653 per sq.m net

Table 13: Comparison Goods Floorspace Expenditure Capacity 2014 to 2029

	Location	2014	2017	2021	2026	2031
Surplus/Deficit Expenditure (£m)	Coventry City Centre	n/a	-27.46	-10.91	28.33	79.39
	Arena Park MDC	n/a	1.79	5.71	14.50	25.78
	Cannon Park MDC	n/a	0.38	1.21	3.07	5.46
	Other District and Local Centres	n/a	2.51	7.92	19.92	35.32
	Non-Bulky Retail Warehouses	n/a	-4.07	-0.37	8.25	19.42
	Bulky Retail Warehouses	n/a	-7.22	0.47	18.29	41.36
	Total	n/a	-34.07	4.02	92.36	206.72
Turnover Density New Floorspace (£ per sq.m)	Non-Bulky Floorspace	£6,000	£6,367	£6,892	£7,609	£8,401
	Bulky Floorspace	£2,500	£2,653	£2,872	£3,171	£3,501
Floorspace Requirement (sq.m net)	Coventry City Centre	n/a	-4,312	-1,584	3,723	9,450
	Arena Park MDC	n/a	280	829	1,906	3,068
	Cannon Park MDC	n/a	59	175	403	649
	Other District and Local Centres	n/a	394	1,150	2,618	4,204
	Non-Bulky Retail Warehouses	n/a	-639	-54	1,084	2,311
	Bulky Retail Warehouses	n/a	-2,721	163	5,768	11,814
	Total	n/a	-6,938	679	15,503	31,496
Floorspace Requirement (sq.m gross)	Coventry City Centre	n/a	-5,749	-2,112	4,965	12,600
	Arena Park MDC	n/a	374	1,105	2,542	4,091
	Cannon Park MDC	n/a	79	234	538	866
	Other District and Local Centres	n/a	525	1,533	3,491	5,605
	Non-Bulky Retail Warehouses	n/a	-752	-64	1,275	2,719
	Bulky Retail Warehouses	n/a	-3,201	192	6,786	13,899
	Total	n/a	-8,724	888	19,595	39,779

Table A: Study Area Population - Alternative Population Projections

Zone	2011	2014	2017	2021	2026	2031
Zone 1 - Coventry Urban South East	81,365	85,266	88,554	92,516	97,353	101,886
Zone 2 - Coventry Urban North West	81,233	85,127	88,410	92,366	97,195	101,720
Zone 3 - Coventry Urban North East	86,340	90,479	93,969	98,173	103,306	108,115
Zone 4 - Coventry Urban South West	75,062	78,660	81,694	85,349	89,812	93,993
Zone 5 - Outer Catchment North West	25,176	25,425	25,742	26,233	26,840	27,392
Zone 6 - Outer Catchment North East	92,004	93,276	94,853	97,109	99,782	102,134
Zone 7 - Outer Catchment South East	38,595	39,464	40,488	41,897	43,475	44,800
Zone 8 - Outer Catchment South West	32,603	33,019	33,646	34,497	35,599	36,653
Total	512,378	530,716	547,355	568,139	593,362	616,693

Source:

Experian 2011 (Census data)

ONS 2012 Projections

Table B: Summary of Comparison Goods Expenditure 2014 to 2031 (Alternative Population Projections)

Centre		2014	2017	2021	2026	2031
Available Expenditure in Coventry (£m)	Coventry City Centre	371.59	419.95	479.36	578.19	694.64
	Arena Park MDC	79.04	86.43	98.24	117.94	141.09
	Cannon Park MDC	16.87	18.53	21.15	25.52	30.66
	Other District and Local Centres	105.76	116.37	133.09	160.88	193.65
	Non-Bulky Retail Warehouses	82.11	90.17	102.93	124.16	149.17
	Bulky Retail Warehouses	167.73	184.00	209.81	252.79	303.41
	Total	823.09	915.45	1,044.59	1,259.47	1,512.63
Turnover of Existing Facilities (£m)	Coventry City Centre	371.59	394.33	426.84	471.26	520.31
	Arena Park MDC	79.04	83.88	90.79	100.24	110.67
	Cannon Park MDC	16.87	17.91	19.38	21.40	23.63
	Other District and Local Centres	105.76	112.23	121.48	134.13	148.09
	Non-Bulky Retail Warehouses	82.11	87.13	94.31	104.13	114.97
	Bulky Retail Warehouses	167.73	177.99	192.66	212.72	234.86
	Total	823.09	873.47	945.47	1,043.88	1,152.53
Turnover of Retail Commitments (£m)	Coventry City Centre (1)	0.00	47.75	51.69	57.07	63.01
	Arena Park MDC	0.00	0.00	0.00	0.00	0.00
	Cannon Park MDC	0.00	0.00	0.00	0.00	0.00
	Other District and Local Centres	0.00	0.00	0.00	0.00	0.00
	Non-Bulky Retail Warehouses (2)	0.00	6.00	6.49	7.17	7.92
	Bulky Retail Warehouses (3)	0.00	11.19	12.11	13.37	14.76
	Total	0.00	64.94	70.29	77.61	85.69

(1) City Centre South Development assumes increase in comparison goods floorspace of 10,000 sq.m GIA - 7,500 sq.m net @ £6,367 per sq.m

(2) Airport Retail Park proposed B&M Bargains store 1,430 sq.m gross -1,200 sq.m net @ £5,000 per sq.m net

(3) Blue Ribbon Park unimplmented DIY store 4,867 sq.m gross -4,500 sq.m net @ £2,653 per sq.m net

Table C: Comparison Goods Floorspace Expenditure Capacity 2014 to 2029 (Alternative Population Projection)

Centre		2014	2017	2021	2026	2031
Surplus/Deficit Expenditure (£m)	Coventry City Centre	n/a	-22.13	0.84	49.86	111.32
	Arena Park MDC	n/a	2.55	7.45	17.70	30.41
	Cannon Park MDC	n/a	0.62	1.77	4.11	7.04
	Other District and Local Centres	n/a	4.14	11.61	26.75	45.57
	Non-Bulky Retail Warehouses	n/a	-2.96	2.12	12.86	26.29
	Bulky Retail Warehouses	n/a	-5.19	5.04	26.70	53.79
	Total	n/a	-22.96	28.82	137.98	274.41
Turnover Density New Floorspace (£ per sq.m)	Non-Bulky Floorspace	£6,000	£6,367	£6,892	£7,609	£8,401
	Bulky Floorspace	£2,500	£2,653	£2,872	£3,171	£3,501
Floorspace Requirement (sq.m net)	Coventry City Centre	n/a	-3,476	122	6,553	13,250
	Arena Park MDC	n/a	400	1,081	2,326	3,620
	Cannon Park MDC	n/a	98	256	541	837
	Other District and Local Centres	n/a	651	1,684	3,515	5,424
	Non-Bulky Retail Warehouses	n/a	-465	308	1,690	3,129
	Bulky Retail Warehouses	n/a	-1,955	1,754	8,421	15,365
	Total	n/a	-4,747	5,205	23,045	41,626
Floorspace Requirement (sq.m gross)	Coventry City Centre	n/a	-4,634	162	8,737	17,667
	Arena Park MDC	n/a	534	1,442	3,101	4,827
	Cannon Park MDC	n/a	131	342	721	1,117
	Other District and Local Centres	n/a	867	2,245	4,687	7,231
	Non-Bulky Retail Warehouses	n/a	-547	362	1,988	3,681
	Bulky Retail Warehouses	n/a	-2,300	2,063	9,907	18,077
	Total	n/a	-5,950	6,616	29,140	52,600

Appendix 4 Cinema Capacity

Table 1: Study Area Population - Baseline Projections

Zone	2011	2014	2017	2021	2026	2031
Zone 1 - Coventry Urban South East	81,365	83,202	85,038	87,487	90,549	93,610
Zone 2 - Coventry Urban North West	81,233	83,067	84,901	87,346	90,402	93,458
Zone 3 - Coventry Urban North East	86,340	88,289	90,238	92,837	96,085	99,334
Zone 4 - Coventry Urban South West	75,062	76,756	78,451	80,710	83,534	86,358
Zone 5 - Outer Catchment North West	25,176	25,469	25,808	26,291	26,884	27,447
Zone 6 - Outer Catchment North East	92,004	94,007	96,010	98,681	102,019	105,357
Zone 7 - Outer Catchment South East	38,595	40,112	41,630	43,653	46,182	48,710
Zone 8 - Outer Catchment South West	32,603	33,450	34,298	35,428	36,840	38,252
Total	512,378	524,352	536,373	552,432	572,494	592,526

Sources:

Experian 2011 (Census data)

Coventry and Warwickshire Joint SHMA (November 2013) Projection 1A and ONS 2012 Projections for Solihull

Table 2: Total Number of Cinema Trips (per annum)

Zone	2014	2017	2021	2026	2031
Zone 1 - Coventry Urban South East	232,965	238,108	244,965	253,536	262,108
Zone 2 - Coventry Urban North West	232,587	237,721	244,567	253,125	261,683
Zone 3 - Coventry Urban North East	247,209	252,667	259,943	269,039	278,134
Zone 4 - Coventry Urban South West	214,918	219,663	225,989	233,896	241,803
Zone 5 - Outer Catchment North West	71,313	72,263	73,614	75,274	76,850
Zone 6 - Outer Catchment North East	263,219	268,828	276,305	285,653	295,000
Zone 7 - Outer Catchment South East	112,314	116,563	122,227	129,308	136,389
Zone 8 - Outer Catchment South West	93,661	96,034	99,197	103,152	107,106
Total	1,468,187	1,501,845	1,546,808	1,602,983	1,659,074

Sources:

Table 1

Assumes 2.8 cinema trips per person per annum (NLP CineScope)

Table 3: Base Year 2014 Cinema Market Shares (%)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Coventry City Total	96.4%	71.4%	90.2%	88.0%	43.1%	18.7%	21.9%	48.9%	10.0%
Nuneaton	0.9%	23.2%	4.4%	1.4%	11.5%	80.3%	0.0%	0.0%	n/a
Birmingham	0.0%	1.4%	1.6%	6.4%	7.9%	0.0%	0.0%	0.0%	n/a
Leamington Spa	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	30.1%	n/a
Rugby	0.0%	0.0%	1.6%	0.5%	0.0%	0.0%	76.5%	0.0%	n/a
Solihull	1.8%	0.7%	0.0%	2.1%	36.9%	0.0%	0.0%	17.7%	n/a
Other	0.9%	3.3%	2.2%	1.6%	0.6%	1.0%	1.1%	3.3%	n/a
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey June 2014

Table 4: Base Year 2014 Total Cinema Trips per annum

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Trips 2014	232,965	232,587	247,209	214,918	71,313	263,219	112,314	93,661		1,468,187
Coventry City Total	224,578	166,067	222,983	189,128	30,736	49,222	24,597	45,800	105,901	1,059,012
Nuneaton	2,097	53,960	10,877	3,009	8,201	211,365	0	0	n/a	289,509
Birmingham	0	3,256	3,955	13,755	5,634	0	0	0	n/a	26,600
Leamington Spa	0	0	0	0	0	0	562	28,192	n/a	28,754
Rugby	0	0	3,955	1,075	0	0	85,921	0	n/a	90,950
Solihull	4,193	1,628	0	4,513	26,314	0	0	16,578	n/a	53,227
Other	2,097	7,675	5,439	3,439	428	2,632	1,235	3,091	n/a	26,036
Total	232,965	232,587	247,209	214,918	71,313	263,219	112,314	93,661	n/a	1,574,088

Source: Tables 2 and 3

Table 5: Future Cinema Market Shares (%)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Coventry City Total	98.0%	95.0%	95.0%	95.0%	60.0%	30.0%	40.0%	65.0%	10.0%
Other	2.0%	5.0%	5.0%	5.0%	40.0%	70.0%	60.0%	35.0%	n/a
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey June 2014 and NLP uplift assumptions

Table 6: Total Cinema Trips Per Annum 2017

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Trips 2017	238,108	237,721	252,667	219,663	72,263	268,828	116,563	96,034		1,501,845
Coventry City Total	233,346	225,835	240,033	208,679	43,358	80,648	46,625	62,422	126,772	1,267,719
Other	4,762	11,886	12,633	10,983	28,905	188,179	69,938	33,612	n/a	360,899
Total	238,108	237,721	252,667	219,663	72,263	268,828	116,563	96,034	n/a	1,628,617

Source: Tables 2 and 5

Table 7: Total Cinema Trips Per Annum 2021

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Trips 2021	244,965	244,567	259,943	225,989	73,614	276,305	122,227	99,197		1,546,808
Coventry City Total	240,066	232,339	246,946	214,689	44,168	82,892	48,891	64,478	130,497	1,304,966
Other	4,899	12,228	12,997	11,299	29,446	193,414	73,336	34,719	n/a	372,339
Total	244,965	244,567	259,943	225,989	73,614	276,305	122,227	99,197	n/a	1,677,305

Source: Tables 2 and 5

Table 8: Total Cinema Trips Per Annum 2026

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Trips 2026	253,536	253,125	269,039	233,896	75,274	285,653	129,308	103,152		1,602,983
Coventry City Total	248,466	240,469	255,587	222,201	45,164	85,696	51,723	67,049	135,151	1,351,505
Other	5,071	12,656	13,452	11,695	30,110	199,957	77,585	36,103	n/a	386,628
Total	253,536	253,125	269,039	233,896	75,274	285,653	129,308	103,152	n/a	1,738,133

Source: Tables 2 and 5

Table 9: Total Cinema Trips Per Annum 2031

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Trips 2031	262,108	261,683	278,134	241,803	76,850	295,000	136,389	107,106		1,659,074
Coventry City Total	256,866	248,598	264,227	229,713	46,110	88,500	54,556	69,619	139,799	1,397,989
Other	5,242	13,084	13,907	12,090	30,740	206,500	81,833	37,487	n/a	400,884
Total	262,108	261,683	278,134	241,803	76,850	295,000	136,389	107,106	n/a	1,798,872

Source: Tables 2 and 5

Table 10: Cinema Capacity 2014 to 2031

	2014	2017	2021	2026	2031
Total Cinema Trips attracted to Coventry City (per annum)	1,059,012	1,267,719	1,304,966	1,351,505	1,397,989
Number of Trips per Screen (per annum)	47,000	47,000	47,000	47,000	47,000
Cinema Screen Potential	23	27	28	29	30
Existing Screens in Coventry City	24	24	24	24	24
Seat Capacity	-1	3	4	5	6

Appendix 5 Food and Drink Capacity

Table 1: Food and Beverage Expenditure per person (£)

Zone	2014	2017	2021	2026	2031
Zone 1 - Coventry Urban South East	842	878	928	995	1,067
Zone 2 - Coventry Urban North West	719	749	792	849	910
Zone 3 - Coventry Urban North East	733	764	808	866	928
Zone 4 - Coventry Urban South West	921	960	1,015	1,088	1,166
Zone 5 - Outer Catchment North West	1,188	1,238	1,309	1,404	1,505
Zone 6 - Outer Catchment North East	913	951	1,006	1,078	1,156
Zone 7 - Outer Catchment South East	1,096	1,143	1,209	1,296	1,389
Zone 8 - Outer Catchment South West	1,214	1,266	1,338	1,434	1,538

Sources: Experian Local Expenditure 2012 (2012 prices)
Growth Rates: -0.2% 2012-2013, 0.7% 2013-2014, and 1.4% from 2014

Table 2: Total Food and Beverage Expenditure (£m)

Zone	2014	2017	2021	2026	2031
Zone 1 - Coventry Urban South East	70.07	74.67	81.21	90.10	99.86
Zone 2 - Coventry Urban North West	59.69	63.60	69.18	76.75	85.06
Zone 3 - Coventry Urban North East	64.68	68.93	74.97	83.18	92.18
Zone 4 - Coventry Urban South West	70.66	75.30	81.89	90.86	100.69
Zone 5 - Outer Catchment North West	30.25	31.96	34.42	37.73	41.30
Zone 6 - Outer Catchment North East	85.78	91.34	99.25	110.00	121.77
Zone 7 - Outer Catchment South East	43.98	47.59	52.75	59.83	67.65
Zone 8 - Outer Catchment South West	40.61	43.41	47.41	52.84	58.82
Total	465.73	496.80	541.09	601.30	667.33

Source: Table 1 and population projections Table 1 Appendix 2

Table 3: Base Year 2014 Food & Beverage Market Shares (%)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Coventry City Centre	28.6%	27.5%	28.8%	28.5%	19.7%	8.6%	4.2%	2.2%	5.0%
Major District Centres/District Centres	16.8%	7.8%	12.7%	21.8%	1.7%	4.8%	5.7%	0.0%	5.0%
Other Coventry	15.1%	27.9%	26.2%	12.6%	1.3%	2.1%	0.0%	0.6%	5.0%
Coventry City Total	60.5%	63.2%	67.7%	62.9%	22.7%	15.5%	9.9%	2.8%	
Bedworth/Nuneaton	1.5%	5.2%	2.5%	0.3%	5.6%	58.5%	0.0%	0.0%	n/a
Leicester	0.0%	0.6%	0.6%	0.0%	1.7%	2.2%	2.3%	0.0%	n/a
Rugby	3.3%	0.0%	1.4%	1.0%	0.8%	0.6%	59.5%	1.7%	n/a
Kenilworth/Leamington	13.8%	4.0%	5.8%	15.0%	4.8%	2.2%	11.8%	62.2%	n/a
Solihull/Birmingham	2.4%	5.4%	2.0%	5.9%	25.2%	2.6%	3.8%	7.2%	n/a
Elsewhere	18.5%	21.6%	20.0%	14.9%	39.2%	18.4%	12.7%	26.1%	n/a
Other Sub-Total	39.5%	36.8%	32.3%	37.1%	77.3%	84.5%	90.1%	97.2%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey March 2014

Table 4: Base Year 2014 Food & Beverage Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2014	70.07	59.69	64.68	70.66	30.25	85.78	43.98	40.61		465.73
Coventry City Centre	20.04	16.41	18.63	20.14	5.96	7.38	1.85	0.89	4.81	96.10
Major District Centres/District Centres	11.77	4.66	8.21	15.40	0.51	4.12	2.51	0.00	2.48	49.67
Other Coventry	10.58	16.65	16.95	8.90	0.39	1.80	0.00	0.24	2.92	58.44
Coventry City Total	42.39	37.72	43.79	44.44	6.87	13.30	4.35	1.14	10.21	204.22
Bedworth/Nuneaton	1.05	3.10	1.62	0.21	1.69	50.18	0.00	0.00	n/a	57.86
Leicester	0.00	0.36	0.39	0.00	0.51	1.89	1.01	0.00	n/a	4.16
Rugby	2.31	0.00	0.91	0.71	0.24	0.51	26.17	0.69	n/a	31.54
Kenilworth/Leamington	9.67	2.39	3.75	10.60	1.45	1.89	5.19	25.26	n/a	60.20
Solihull/Birmingham	1.68	3.22	1.29	4.17	7.62	2.23	1.67	2.92	n/a	24.82
Elsewhere	12.96	12.89	12.94	10.53	11.86	15.78	5.59	10.60	n/a	93.15
Other Sub-Total	27.68	21.97	20.89	26.21	23.39	72.49	39.63	39.47	n/a	271.73
TOTAL	70.07	59.69	64.68	70.66	30.25	85.78	43.99	40.61		475.95

Source: Table 2 and 3

Table 5: Future Food & Beverage Market Shares (%)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Coventry City Centre	35.0%	35.0%	35.0%	35.0%	25.0%	10.0%	10.0%	5.0%	5.0%
Major District Centres/District Centres	15.6%	7.2%	11.8%	20.1%	1.7%	4.8%	5.7%	0.0%	5.0%
Other Coventry	14.1%	25.4%	24.3%	11.6%	1.3%	2.1%	0.0%	0.6%	5.0%
Coventry City Total	64.7%	67.6%	71.1%	66.7%	28.0%	16.9%	15.7%	5.6%	
Elsewhere	35.3%	32.4%	28.9%	33.3%	72.0%	83.1%	84.3%	94.4%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey March 2014 with NLP adjustments

Table 6: Future 2017 Food & Beverage Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2017	74.67	63.60	68.93	75.30	31.96	91.34	47.59	43.41		496.80
Coventry City Centre	26.13	22.26	24.12	26.35	7.99	9.13	4.76	2.17	6.47	129.40
Major District Centres/District Centres	11.65	4.58	8.13	15.13	0.54	4.38	2.71	0.00	2.48	49.62
Other Coventry	10.53	16.16	16.75	8.73	0.42	1.92	0.00	0.26	2.88	57.64
Coventry City Total	48.31	43.00	49.01	50.22	8.95	15.44	7.47	2.43	11.83	236.66
Elsewhere	26.36	20.61	19.92	25.07	23.01	75.91	40.12	40.98	n/a	271.98
TOTAL	74.67	63.60	68.93	75.30	31.96	91.34	47.59	43.41		508.63

Source: Table 2 and 5

Table 7: Future 2021 Food & Beverage Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2021	81.21	69.18	74.97	81.89	34.42	99.25	52.75	47.41		541.09
Coventry City Centre	28.42	24.21	26.24	28.66	8.61	9.93	5.28	2.37	7.04	140.75
Major District Centres/District Centres	12.67	4.98	8.85	16.46	0.59	4.76	3.01	0.00	2.70	54.01
Other Coventry	11.45	17.57	18.22	9.50	0.45	2.08	0.00	0.28	3.13	62.69
Coventry City Total	52.54	46.76	53.30	54.62	9.64	16.77	8.28	2.65	12.87	257.46
Elsewhere	28.67	22.41	21.67	27.27	24.78	82.48	44.47	44.75	n/a	296.50
TOTAL	81.21	69.18	74.97	81.89	34.42	99.25	52.75	47.41		553.96

Source: Table 2 and 5

Table 8: Future 2026 Food & Beverage Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2026	90.10	76.75	83.18	90.86	37.73	110.00	59.83	52.84		601.30
Coventry City Centre	31.54	26.86	29.11	31.80	9.43	11.00	5.98	2.64	7.81	156.18
Major District Centres/District Centres	14.06	5.53	9.81	18.26	0.64	5.28	3.41	0.00	3.00	59.99
Other Coventry	12.70	19.50	20.21	10.54	0.49	2.31	0.00	0.32	3.48	69.55
Coventry City Total	58.30	51.89	59.14	60.60	10.57	18.59	9.39	2.96	14.29	285.72
Elsewhere	31.81	24.87	24.04	30.26	27.17	91.41	50.44	49.89	n/a	329.87
TOTAL	90.10	76.75	83.18	90.86	37.73	110.00	59.83	52.84		615.58

Source: Table 2 and 5

Table 9: Future 2031 Food & Beverage Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2031	99.86	85.06	92.18	100.69	41.30	121.77	67.65	58.82		667.33
Coventry City Centre	34.95	29.77	32.26	35.24	10.32	12.18	6.76	2.94	8.65	173.09
Major District Centres/District Centres	15.58	6.12	10.88	20.24	0.70	5.85	3.86	0.00	3.33	66.55
Other Coventry	14.08	21.61	22.40	11.68	0.54	2.56	0.00	0.35	3.85	77.07
Coventry City Total	64.61	57.50	65.54	67.16	11.56	20.58	10.62	3.29	15.84	316.70
Elsewhere	35.25	27.56	26.64	33.53	29.73	101.19	57.03	55.53	n/a	366.46
TOTAL	99.86	85.06	92.18	100.69	41.30	121.77	67.65	58.82		683.16

Source: Table 2 and 5

Table 10: Summary of Food & Beverage Expenditure 2014 to 2031

Centre	2014	2017	2021	2026	2031
Available Expenditure in Coventry (£m)					
Coventry City Centre	96.10	129.40	140.75	156.18	173.09
Major District Centres/District Centres	49.67	49.62	54.01	59.99	66.55
Other Coventry	58.44	57.64	62.69	69.55	77.07
Total	204.22	236.66	257.46	285.72	316.70
Turnover of Existing Facilities (£m)					
Coventry City Centre	96.10	99.02	103.04	108.29	113.82
Major District Centres/District Centres	49.67	51.17	53.25	55.97	58.82
Other Coventry	58.44	60.22	62.66	65.86	69.22
Total	204.22	210.41	218.95	230.12	241.86
Surplus/Deficit Expenditure (£m)					
Coventry City Centre	n/a	30.38	37.71	47.89	59.27
Major District Centres/District Centres	n/a	-1.56	0.76	4.02	7.73
Other Coventry	n/a	-2.57	0.03	3.69	7.85
Total	n/a	26.25	38.51	55.60	74.85

Source: Tables 4 to 9

Table 11: Food and Beverage Floorspace Expenditure Capacity 2014 to 2031

	2014	2017	2021	2026	2031
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,152	£5,361	£5,634	£5,922
Floorspace Requirement (sq.m gross)					
Coventry City Centre	n/a	5,897	7,035	8,499	10,009
Major District Centres/District Centres	n/a	-302	142	714	1,305
Other Coventry	n/a	-499	5	655	1,325
Total	n/a	5,096	7,183	9,868	12,640

Appendix 6 Audit of Centres

A. Coventry City Centre

Coventry City Centre is the main shopping and commercial centre in the City of Coventry. It has a large number of retail and service uses. The centre serves shoppers from across the City and beyond, particularly for comparison shopping. Its key roles include:

- *convenience shopping* – provides a mixture of national multiple convenience goods retailers, including Co-op, Iceland, Sainsbury's, Tesco, Holland & Barrett and Greggs, together with a range of independent and specialist retailers. These facilities serve top-up food shopping trips and some main food shopping trips;
- *comparison shopping* – provides a good range of comparison goods stores, with major retailers comprising Ikea, Marks & Spencer, Debenhams and BHS department stores, and national multiple retailers including Primark, Next, H&M, Wilkinsons and Argos. There is also a reasonable range of independent retailers;
- *services* – provides a wide range of services, including high street national banks, cafés, restaurants, takeaways, travel agents and hairdressers/beauty salons;
- *entertainment* – entertainment uses include a cinema, theatre, ice rink, nightclubs and a range of pubs and bars; and
- *community facilities* – facilities include a library, swimming pool and sports centre, places of worship, City Council offices, Coventry University, advice centres and employment agencies.

Mix of Uses and Retailer Occupation

Coventry city centre (the Goad Plan area within the ring road) has a total of 567 retail/service uses. The figure excluding Class A4 pubs/bars is 538 units, which is the same as the figure recorded in 2005. The diversity of uses present in Coventry city centre in terms of the number of units is set out in Table A.1, compared against the national average.

Table A.1 Coventry City Centre Use Class Mix by Unit

Type of Unit	Units 2005	Units 2013	% of Total Number of Units	
			Coventry %	UK Average ⁽¹⁾
Comparison Retail	251	190	33.5	36.0
Convenience Retail	53	53	9.3	8.1
A1 Services ⁽²⁾	34	49	8.6	14.1
A2 Services	99	96	17.0	12.1
A3/A5 Restaurants/Takeaways	45	66	11.7	14.7
A4 Pubs/Bars	n/a	29	5.1	2.9
Vacant	56	84	14.8	12.1
Total	538	567	100.0	100.0

Source: 2006 Retail Study and Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

⁽²⁾ incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

In addition to the retail units in Table A.1 above, Coventry Market also provides over 200 stalls selling a wide range of comparison and convenience goods.

The number of vacant shop units has increased significantly since 2005 and the vacancy rate is now above the national average. The vacancy rate appears to have increased partly due to the reduction in the number of Class A1 comparison retail units, which has fallen by 61 units. The proportion of comparison good outlets is now slightly below the Goad national average, which based on NLP's experience is unusual for a large city centre. The centre has seen a significant growth in the number of Class A1 services (19 additional units) and Class A3/A5 food and drink outlets (21 additional units).

Retailer Representation

Coventry city centre has a good selection of comparison shops (188) reflecting its size and role in the shopping hierarchy. Table A.2 provides a breakdown of comparison shop units by category.

Table A.2 Coventry Town Centre Breakdown of Comparison Units

Type of Unit	Coventry		% UK Average ⁽¹⁾
	Units	%	
Clothing and footwear	65	34.2	25.0
Furniture, carpets and textiles	7	3.7	7.4
Booksellers, arts, crafts and stationers	9	4.7	10.6
Electrical, gas, music and photography	21	11.0	9.4
DIY, hardware and homewares	3	1.6	6.4
China, glass, gifts and fancy goods	9	4.7	4.6
Cars, motorcycles and motor accessories	0	0.0	1.3
Chemists, drug stores and opticians	18	9.5	10.0
Variety, department and catalogue	12	6.3	1.6
Florists, nurserymen and seedsmen	2	1.1	2.3
Toys, hobby, cycle and sport	11	5.8	5.2
Jewellers	15	7.9	5.0
Charity/second hand shops	14	7.4	8.4
Other comparison retailers	4	2.1	2.9
Total	190	100.0	100.0

Source: Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

The number of comparison retail units within Coventry has fallen considerably since 2005, decreasing by 63 units overall.

The centre provides all of the GOAD comparison categories, with the exception of cars/motorcycles/motor accessories. The centre has a good provision of clothing and footwear shops, variety/department/catalogue stores, jewellers and electrical/gas/music/photography retailers. There is a below average provision of booksellers/arts/crafts/stationers, DIY/hardware/homewares and furniture/carpets/textiles. The centre has a slightly below average provision of charity and secondhand shops.

Service Uses

Coventry city centre has a good range of non-retail services, with all categories well represented (see Table A.3). The mix of services is similar to the national average, although the centre has a higher proportion of hairdressers/beauty parlours and a lower proportion of fast food/takeaways. There is a mix of food and drink establishments including coffee shops, cafes, pubs and restaurants.

Table A.3 Coventry City Centre Analysis of Selected Service Uses

Type of Unit	Coventry		% UK Average ⁽¹⁾
	Units	%	
Restaurants/cafés	56	26.5	23.3
Fast food/takeaways	10	4.7	15.2
Pubs/bars	29	13.8	7.6
Banks/other financial services	35	16.6	12.9
Betting shops/casinos	10	4.7	4.0
Estate agents/valuers	27	12.8	9.5
Travel agents	8	3.8	2.5
Hairdressers/beauty parlours	34	16.1	22.9
Laundries/dry cleaners	2	1.0	2.2
Sub-Total	211	100.0	100.0
Other A1 Retail Services	5		
Total	216		

Source: Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

Based on the Coventry City Council 2013 Land Use Survey, there were 84 vacant retail units within Coventry city centre, which gives a vacancy rate of 14.8% which is above the Goad national average of 12.1%. This has increased from the number of vacant units in 2005 (56). The vacant units are dispersed throughout the centre. However there are clusters of vacant units within City Arcade, Smithford Way and Cathedral Lanes.

Coventry's Strengths and Weaknesses

Strengths

- The centre provides a reasonable range and mix of both national multiple retailers and independent comparison retailers.
- The centre has a number of anchor department stores, attracting customers to the city centre.
- The centre has a good range and choice of non-retail services. There is a good mix and choice of food and drink establishments.
- The centre is easily accessible by public transport and provides several major public car parks.

- The centre has a thriving evening economy, providing a range of entertainment uses.

Weaknesses

- For a city, the centre has a low proportion of comparison goods retailers.
- The centre's vacancy rate is higher than the national average, which suggests demand for premises is weak.
- Some areas of the centre are in need of regeneration and investment.

B. Arena Park Major District Centre

Arena Park is a purpose built Major District Centre serving Coventry's northern suburbs. It is located north east of the City Centre, just south of the M6.

Mix of Uses and Occupier Representation

Arena Park has a total of 27 retail/service uses. The centre is anchored by a Tesco Extra superstore. The centre also has a number of large format stores occupied by major national retailers, such as Marks & Spencer and Next. The centre's key roles include:

- *convenience shopping* – the Tesco Extra store is the main convenience provision within the centre, plus the Marks & Spencer food hall and Greggs bakers.
- *comparison shopping* – key comparison retailers present include Marks & Spencer, Next, New Look, Decathlon and Boots.
- *services* – service provision includes cafés/restaurants, travel agents, building society, hairdressers and dry cleaners.
- *community facilities* – the centre contains a library.

The diversity of uses present in the centre in terms of the number of units is set out in Table B.1, compared against the national average.

Table B.1 Arena Park Use Class Mix by Unit

Type of Unit	Units 2005	Units 2013	% of Total Number of Units	
			Arena Park %	UK Average ⁽¹⁾
Comparison Retail	9	14	51.9	36.0
Convenience Retail	2	2	7.4	8.1
A1 Services ⁽²⁾	3	4	14.8	14.1
A2 Services	2	2	7.4	12.1
A3/A5 Restaurants/Takeaways	2	5	18.5	14.7
A4 Pubs/Bars	0	0	0.0	2.9
Vacant	0	0	0.0	12.1
Total	18	27	100.0	100.0

Source: 2006 Retail Study and Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

⁽²⁾ incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

The number of units in the centre has increased from 18 to 27 since 2005, due to the implementation of additional development in the centre. While the number of convenience and comparison retailers in the centre is lower than some other district centres in Coventry, this does not take into account the size of the units occupied at Arena Park, the presence of national multiples and the range of goods available.

Retailer Representation

Arena Park offers a fairly limited selection of comparison shops (14), although as earlier stated, the size and range of goods available is not taken into

account. Table B.2 provides a breakdown of comparison shop units by category. Given the limited number of units, Arena Park provides only a few of the Goad comparison categories.

Table B.2 Arena Park Breakdown of Comparison Units

Type of Unit	Arena Park		% UK Average ⁽¹⁾
	Units	%	
Clothing and footwear	3	21.4	25.0
Furniture, carpets and textiles	3	21.4	7.4
Booksellers, arts, crafts and stationers	0	0.0	10.6
Electrical, gas, music and photography	2	14.3	9.4
DIY, hardware and homewares	0	0.0	6.4
China, glass, gifts and fancy goods	1	7.1	4.6
Cars, motorcycles and motor accessories	0	0.0	1.3
Chemists, drug stores and opticians	1	7.1	10.0
Variety, department and catalogue	1	7.1	1.6
Florists, nurserymen and seedsmen	0	0.0	2.3
Toys, hobby, cycle and sport	2	14.3	5.2
Jewellers	0	0.0	5.0
Charity/second hand shops	0	0.0	8.4
Other comparison retailers	1	7.1	2.9
Total	14	100.0	100.0

Source: Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

Arena Park offers a limited range of non-retail service uses, with six out of the nine main categories present (see Table B.3).

Table B.3 Arena Park Analysis of Selected Service Uses

Type of Unit	Arena Park		% UK Average ⁽¹⁾
	Units	%	
Restaurants/café	4	40.0	23.3
Fast food/takeaways	1	10.0	15.2
Pubs/bars	0	0.0	7.6
Banks/other financial services	2	20.0	12.9
Betting shops/casinos	0	0.0	4.0
Estate agents/valuers	0	0.0	9.5
Travel agents	1	10.0	2.5
Hairdressers/beauty parlours	1	10.0	22.9
Laundries/dry cleaners	1	10.0	2.2
Sub-Total	10	100.0	100.0
Other A1 Retail Services	1		
Total	11		

Source: Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were no vacant retail units within Arena Park at the time of the Coventry City Council 2013 Land Use Survey.

Summary of Arena Park's Strengths and Weaknesses

Strengths

- The centre has no vacant units, which indicates the centre is healthy, vital and viable.
- National multiple retailers provide a higher order shopping offer than other centres.
- There is a good provision of surface level car parking serving the centre.

Weaknesses

- Although identified as a major district centre, the centre functions as an out of centre retail park, with limited ancillary services.
- There is little public realm within the centre to enhance its overall attractiveness.

C. Ball Hill Major District Centre

Ball Hill is designated as a Major District Centre. It is a linear centre, located along Walsgrave Road. Ball Hill is located to the east of Coventry City Centre and serves the eastern suburbs of Coventry. It is the closest Major District centre to the City Centre. The centre is a traditional high street with a reasonable number of units (105). The centre's key roles include:

- *convenience shopping* – the centre provides a range of convenience shops, including a Tesco Express, and a selection of independent and specialist food stores.
- *comparison shopping* – the centre provides a limited range of mostly independent retailers. Boots is the only national multiple comparison retailer in the centre.
- *services* – the centre provides a reasonable mix of services, including banks, building societies, bookmakers, estate agents, hairdressers, cafés and restaurants.

Mix of Uses and Occupier Representation

Ball Hill has a total of 105 retail/service uses, an increase of 13 units since 2005. The diversity of uses present in the centre in terms of the number of units is set out in Table C.1, compared against the national average.

Table C.1 Ball Hill Use Class Mix by Unit

Type of Unit	Units 2005	Units 2013	% of Total Number of Units	
			Ball Hill %	UK Average ⁽¹⁾
Comparison Retail	45	34	32.4	36.0
Convenience Retail	11	13	12.4	8.1
A1 Services ⁽²⁾	8	18	17.1	14.1
A2 Services	12	13	12.4	12.1
A3/A5 Restaurants/Takeaways	7	16	15.2	14.7
A4 Pubs/Bars	n/a	1	1.0	2.9
Vacant	9	10	9.5	12.1
Total	92	105	100.0	100.0

Source: 2006 Retail Study and Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

⁽²⁾ incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

The centre's mix of units is broadly similar to the national average. The vacancy rate of this centre is lower than the national average at 9.5%, which suggests a vital and viable centre. Comparison retail (-11 units) and A2 services (-1 units) are the only categories that have decreased since 2005. All other categories have increased, particularly A1 services (+10 units) and A3/A5 (+9 units).

Retailer Representation

Ball Hill has a fairly reasonable selection of comparison shops (34). Table C.2 provides a breakdown of comparison shop units by category. Most of the

Goad categories are represented within the centre, although the choice within each category is limited.

Table C.2 Ball Hill Breakdown of Comparison Units

Type of Unit	Ball Hill		% UK Average ⁽¹⁾
	Units	%	
Clothing and footwear	4	11.8	25.0
Furniture, carpets and textiles	3	8.8	7.4
Booksellers, arts, crafts and stationers	0	0.0	10.6
Electrical, gas, music and photography	6	17.6	9.4
DIY, hardware and homewares	3	8.8	6.4
China, glass, gifts and fancy goods	2	5.9	4.6
Cars, motorcycles and motor accessories	1	2.9	1.3
Chemists, drug stores and opticians	5	14.7	10.0
Variety, department and catalogue	0	0.0	1.6
Florists, nurserymen and seedsmen	1	2.9	2.3
Toys, hobby, cycle and sport	2	5.9	5.2
Jewellers	1	2.9	5.0
Charity/second hand shops	5	14.7	8.4
Other comparison retailers	1	2.9	2.9
Total	34	100.0	100.0

Source: Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

Ball Hill has a reasonable range of non-retail service uses reflecting the size of Ball Hill and its service role in the shopping hierarchy. There are no travel agents within the centre, however all other categories are represented.

Table C.3 Ball Hill Analysis of Selected Service Uses

Type of Unit	Ball Hill		% UK Average ⁽¹⁾
	Units	%	
Restaurants/cafés	10	21.3	23.3
Fast food/takeaways	6	12.8	15.2
Pubs/bars	1	2.1	7.6
Banks/other financial services	9	19.2	12.9
Betting shops/casinos	1	2.1	4.0
Estate agents/valuers	3	6.4	9.5
Travel agents	0	0.0	2.5
Hairdressers/beauty parlours	16	34	22.9
Laundries/dry cleaners	1	2.1	2.2
Sub-Total	47	100.0	100.0
Other A1 Retail Services	1		
Total	48		

Source: Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were 10 vacant retail units within Ball Hill at the time of Coventry City Council 2013 Land Use Survey, giving a vacancy rate of 9.2% which is below the national average of 12.1%.

Summary of Ball Hill's Strengths and Weaknesses

Strengths

- The centre provides a reasonable range of lower order shops and services to serve the day to day needs of local residents.
- The centre caters well for top up convenience goods shopping trips.
- The centre is very accessible by public transport, served by a number of bus routes and with bus stops located within the centre.

Weaknesses

- Walsgrave Road is a busy, main road and can create a barrier for pedestrians within the centre.
- The centre has limited representation by national multiple retailers.
- The centre does not cater for main/bulk food shopping.
- The appearance of the centre is poor quality, with some of the façades in need of improvement.

D. Cannon Park Major District Centre

Cannon Park is a purpose built Major District Centre comprising a covered shopping mall. The centre primarily serves Coventry's south and western suburbs. The centre is anchored by a large Tesco food store. The centre has a reasonable number (37) of units. Many of the units are relatively large and occupied by multiple retailers. The centre's key roles include:

- *convenience shopping* – Tesco provides the main convenience offer of the centre, plus an Iceland store and a specialist Japanese food store.
- *comparison shopping* – the centre provides a mix of national multiple comparison retailers and independent stores. National multiple stores include New Look, Wilkinsons and Boots.
- *services* – the centre provides a limited range of ancillary services, including hairdressers, cafés, travel agent, building society and dry cleaners. The centre also provides a gym and kindergarten.

Mix of Uses and Occupier Representation

Cannon Park has a total of 37 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table D.1, compared against the national average.

Table D.1 Cannon Park Use Class Mix by Unit

Type of Unit	Units 2005	Units 2013	% of Total Number of Units	
			Cannon Park %	UK Average ⁽¹⁾
Comparison Retail	19	16	43.2	36.0
Convenience Retail	2	3	8.1	8.1
A1 Services ⁽²⁾	4	7	18.9	14.1
A2 Services	1	1	2.7	12.1
A3/A5 Restaurants/Takeaways	2	2	5.4	14.7
A4 Pubs/Bars	0	0	0.0	2.9
Vacant	8	8	21.6	12.1
Total	36	37	100.0	100.0

Source: 2006 Retail Study and Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

⁽²⁾ incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

The centre's mix of units shows a higher representation of comparison retailers and A1 services, although the former has decreased by 3 units since 2005.

Retailer Representation

Cannon Park has a limited selection of comparison shops (16). Table D.2 provides a breakdown of comparison shop units by category.

The centre includes stores within nine of the Goad Plan comparison categories, however there is limited choice available in the represented categories.

Table D.2 Cannon Park Breakdown of Comparison Units

Type of Unit	Cannon Park		% UK Average ⁽¹⁾
	Units	%	
Clothing and footwear	4	25.0	25.0
Furniture, carpets and textiles	1	6.3	7.4
Booksellers, arts, crafts and stationers	0	0.0	10.6
Electrical, gas, music and photography	2	12.5	9.4
DIY, hardware and homewares	0	0.0	6.4
China, glass, gifts and fancy goods	1	6.3	4.6
Cars, motorcycles and motor accessories	0	0.0	1.3
Chemists, drug stores and opticians	2	12.5	10.0
Variety, department and catalogue	1	6.3	1.6
Florists, nurserymen and seedsmen	1	6.3	2.3
Toys, hobby, cycle and sport	0	0.0	5.2
Jewellers	1	6.3	5.0
Charity/second hand shops	3	18.8	8.4
Other comparison retailers	0	0.0	2.9
Total	16	100.0	100.0

Source: Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

Cannon Park has a fairly limited range of non-retail service uses, with five of the nine categories present. There are no fast food/takeaways, pubs/bars, betting shops or estate agents, while there is a good choice of hairdressers/beauty parlours. The centre also provides a post office, gym and a kindergarten.

Table D.3 Cannon Park Analysis of Selected Service Uses

Type of Unit	Cannon Park		% UK Average ⁽¹⁾
	Units	%	
Restaurants/café	2	22.2	23.3
Fast food/takeaways	0	0.0	15.2
Pubs/bars	0	0.0	7.6
Banks/other financial services	1	11.1	12.9
Betting shops/casinos	0	0.0	4.0
Estate agents/valuers	0	0.0	9.5
Travel agents	1	11.1	2.5
Hairdressers/beauty parlours	4	44.4	22.9
Laundries/dry cleaners	1	11.1	2.2
Sub-Total	9	100.0	100.0
Other A1 Retail Services	1		
Total	10		

Source: Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were eight vacant units within Cannon Park at the time of the Coventry City Council 2013 Land Use Survey, giving a vacancy rate of 22.9%, which is significantly higher than the national average of 12.1%. This figure is the same as the number of vacant units that were present in the centre in 2005.

Summary of Cannon Park's Strengths and Weaknesses

Strengths

- The purpose built shopping centre provides a traffic free environment for shoppers.
- The centre is anchored by a large Tesco store that is suitable for both main/bulky and top up food shopping.
- Access to the centre for pedestrians and cars is good, and the centre has a large surface car park.
- The quality of the landscaping around the outside of the centre is good.

Weaknesses

- The centre has a high proportion of vacant units, significantly above the national average. The fact that the number of vacant units has not changed since 2005 suggests limited demand for retailers to locate within the centre.
- The centre provides only limited ancillary service uses.

E. Bell Green District Centre

Bell Green is a District Centre situated to the north east of the Coventry urban area. The centre primarily serves the day-to-day shopping and service needs of local residents in the Foleshill and Bell Green residential areas. The centre is anchored by an Aldi food store. Its key roles include:

- *convenience shopping* – the main food store provision is within the Aldi store. The centre also provides a range of independent convenience retailers.
- *comparison shopping* – the centre provides a limited range of lower order comparison retailers.
- *services* – the centre provides a limited selection of restaurants/cafés, takeaways and hairdressers.
- *community facilities* – the centre contains a library.

Mix of Uses and Occupier Representation

Bell Green has a total of 44 retail/service uses. The main shopping area is situated around the pedestrianised Riley Square. There are also several units along Henley Road and Hall Green Road. The diversity of uses present in the centre in terms of the number of units is set out in Table E.1, compared against the national average.

Table E.1 Bell Green Use Class Mix by Unit

Type of Unit	Units 2005	Units 2013	% of Total Number of Units	
			Bell Green %	UK Average ⁽¹⁾
Comparison Retail	11	11	25.0	36.0
Convenience Retail	11	11	25.0	8.1
A1 Services ⁽²⁾	6	2	4.5	14.1
A2 Services	1	2	4.5	12.1
A3/A5 Restaurants/Takeaways	3	5	11.4	14.7
A4 Pubs/Bars	0	0	0.0	2.9
Vacant	11	13	29.5	12.1
Total	43	44	100.0	100.0

Source: 2006 Retail Study and Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

⁽²⁾ incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

The centre has a very high proportion of convenience retailers when compared to the national average, and conversely a rather low proportion of comparison units, as was the case in 2005. All categories other than convenience retail are below the national average, and there are no pubs/bars in the centre.

Retailer Representation

Bell Green has a fairly low selection of comparison shops (11). Table E.2 provides a breakdown of comparison shop units by category.

The centre only provides five of the Goad comparison categories, and the choice available in most categories is low. However, there is a reasonable selection of chemists and charity shops.

Table E.2 Bell Green of Comparison Units

Type of Unit	Bell Green		% UK Average ⁽¹⁾
	Units	%	
Clothing and footwear	1	9.1	25.0
Furniture, carpets and textiles	1	9.1	7.4
Booksellers, arts, crafts and stationers	0	0.0	10.6
Electrical, gas, music and photography	0	0.0	9.4
DIY, hardware and homewares	2	18.2	6.4
China, glass, gifts and fancy goods	0	0.0	4.6
Cars, motorcycles and motor accessories	0	0.0	1.3
Chemists, drug stores and opticians	4	36.4	10.0
Variety, department and catalogue	0	0.0	1.6
Florists, nurserymen and seedsmen	0	0.0	2.3
Toys, hobby, cycle and sport	0	0.0	5.2
Jewellers	0	0.0	5.0
Charity/second hand shops	3	27.3	8.4
Other comparison retailers	0	0.0	2.9
Total	11	100.0	100.0

Source: Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

Bell Green has a limited range of non-retail service uses. There are no estate agents, travel agents or laundries/dry cleaners within the centre.

Table E.3 Bell Green Analysis of Selected Service Uses

Type of Unit	Bell Green		% UK Average ⁽¹⁾
	Units	%	
Restaurants/café	3	30.0	23.3
Fast food/takeaways	2	20.0	15.2
Pubs/bars	1	10.0	7.6
Banks/other financial services	1	10.0	12.9
Betting shops/casinos	1	10.0	4.0
Estate agents/valuers	0	0.0	9.5
Travel agents	0	0.0	2.5
Hairdressers/beauty parlours	2	20.0	22.9
Laundries/dry cleaners	0	0.0	2.2
Sub-Total	10	100.0	100.0
Other A1 Retail Services	0		
Total	10		

Source: Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were 13 vacant retail units within Bell Green at the time of the Coventry City Council 2013 Land Use Survey, giving a vacancy rate of 29.5%, significantly above the national average of 12.1%. The vacant units are concentrated within the Riley Square pedestrianised shopping area.

Summary of Bell Green's Strengths and Weaknesses

Strengths

- The Aldi store provides an anchor for the centre, and together with the other convenience stores in the centre, caters well for the day to day convenience shopping needs of local residents.
- The centre is reasonably well connected via public transport and is easily accessible for pedestrians.

Weaknesses

- Riley Square has a poor quality physical appearance.
- The vacancy rate is significantly higher than the national average, and there is a concentration of vacant units within Riley Square.
- There is a limited choice of comparison goods retailers and limited ancillary services.

F. Brade Drive District Centre

Brade Drive is situated north east of Coventry, in close proximity to Coventry City LPA's boundary. The centre was designated to predominantly serve the Walsgrave, Woodway Park, Potter's Green and Wyken area of the City. The centre is anchored by a large Asda store, which serves both main-food shopping needs of local residents. The Asda store is supported by a small number of other shops and services. The centre's limited existing role includes:

- *convenience shopping* – the large Asda store plus an Aldi supermarket.
- *services* – a travel agent and dry cleaners.
- *entertainment* – Gala Bingo.

Mix of Uses and Occupier Representation

Brade Drive has six retail/service uses plus a Gala Bingo (D2 leisure). The diversity of uses present in the centre in terms of the number of units is set out in Table F.1, compared against the national average.

Table F.1 Brade Drive Class Mix by Unit

Type of Unit	Units 2005	Units 2013	% of Total Number of Units	
			Brade Drive %	UK Average ⁽¹⁾
Comparison Retail	2	2	33.3	36.0
Convenience Retail	2	2	33.3	8.1
A1 Services ⁽²⁾	2	2	33.3	14.1
A2 Services	0	0	0.0	12.1
A3/A5 Restaurants/Takeaways	0	0	0.0	14.7
A4 Pubs/Bars	0	0	0.0	2.9
Vacant	0	0	0.0	12.1
Total	6	6	100.0	100.0

Source: 2006 Retail Study and Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

⁽²⁾ incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

The centre provides two comparison, two convenience and two A1 service units, but there are no A2, A3/A5 or A4 services. The centre's mix has stayed the same since 2005.

Retailer Representation

Brade Drive has two comparison shops, comprising an opticians and a pet shop. The Asda store also provides a significant amount of comparison goods floorspace selling a range of goods. The centre does not offer the same range and choice of facilities available within other district centres in Coventry.

Service Uses

Brade Drive offers very limited service uses, with one travel agent and one dry cleaners. Gala Bingo is also present within the centre.

Vacant Units

There were no vacant retail units within Brade Drive at the time of the Coventry City Council 2013 Land Use Survey.

Summary of Brade Drive's Strengths and Weaknesses

Strengths

- The Asda store anchors the centre and is suitable for main and bulk food shopping.
- The centre has no vacant units, which indicates the centre is healthy, vital and viable.
- There is a good provision of surface level car parking serving the centre.

Weaknesses

- The centre has a very limited selection of comparison retailers.
- Although identified as a district centre, the centre functions as an out of centre superstore, with limited ancillary services and facilities.

G. Brandon Road District Centre

Brandon Road District Centre is located in the south east of the City. This centre previously comprised a stand alone Morrisons store, but since 2005 the adjacent Warwickshire Shopping Park has been completed, extending the district centre. This scheme is currently only partially let.

Mix of Uses and Occupier Representation

In total Brandon Road District Centre has 27 retail/service uses, of which only 10 are occupied. 17 of the new units have not yet been let. The diversity of uses present in the centre in terms of the number of units is set out in Table G.1, compared against the national average.

Table G.1 Brandon Road Class Mix by Unit

Type of Unit	Units 2005	Units 2013	% of Total Number of Units	
			Brandon Rd %	UK Average ⁽¹⁾
Comparison Retail	0	6	22.2	36.0
Convenience Retail	1	2	7.4	8.1
A1 Services ⁽²⁾	0	1	3.7	14.1
A2 Services	0	0	0.0	12.1
A3/A5 Restaurants/Takeaways	0	1	3.7	14.7
A4 Pubs/Bars	0	0	0.0	2.9
Vacant	0	17	63.0	12.1
Total	1	27	100.0	100.0

Source: 2006 Retail Study and Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

⁽²⁾ incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

Retailer Representation

The centre has a strong food and grocery offer with Morrison's and Marks & Spencer Simply food. At present there is a small selection of comparison shops (6). These comprise Asda Living, Outfit, Boots, Phones 4 U, O2 and Carphone Warehouse.

Service Uses

Brandon Road has two service uses: a Costa coffee outlet and a barber shop. The centre also contains a community centre.

Vacant Units

There are 17 units available to let, totalling around 4,800 sq.m gross. The unit sizes range from about 100 to 900 sq.m gross. The reason for the high vacancy level is that the Warwickshire Shopping Park scheme has only recently been completed, and not all of the units have been let.

Summary of Brandon Road's Strengths and Weaknesses

Strengths

- The Morrisons store is suitable for main and bulk food shopping needs.
- The new Warwickshire Shopping Park development provides a range of high quality, modern retail units.
- The centre is easily accessible and provides a good level of surface car parking adjacent to the retail units.

Weaknesses

- There is currently a high vacancy rate for the centre as the new units have not yet been let.
- The centre has a very limited range of ancillary service uses.

H. Daventry Road District Centre

Daventry Road is a designated district centre and is situated to the south of Coventry. The centre primarily serves the day-to-day shopping and service needs of local residents in the Cheylesmore area to the south of the City Centre. The centre has a number of relatively small units and, unlike most other district centres, does not have a main anchor store. Its key roles include:

- *convenience shopping* – the centre provides a range of mostly independent convenience retailers, including butchers, greengrocers and an off licence, plus a small Spar store.
- *comparison shopping* – the centre provides a limited range of lower order comparison retailers.
- *services* – the centre provides some services including banks, hairdressers, travel agents, cafés and takeaways.

Mix of Uses and Occupier Representation

Daventry Road has a total of 47 retail/service uses. The main shopping area is situated along Daventry Road, with several other commercial units along Quinton Parade and Queen Isabell's Avenue. The diversity of uses present in the centre in terms of the number of units is set out in Table H.1, compared against the national average.

Table H.1 Daventry Road Use Class Mix by Unit

Type of Unit	Units 2005	Units 2013	% of Total Number of Units	
			Daventry Rd %	UK Average ⁽¹⁾
Comparison Retail	18	16	34.0	36.0
Convenience Retail	9	9	19.1	8.1
A1 Services ⁽²⁾	6	8	17.0	14.1
A2 Services	9	7	14.9	12.1
A3/A5 Restaurants/Takeaways	3	4	8.5	14.7
A4 Pubs/Bars	0	0	0.0	2.9
Vacant	0	3	6.4	12.1
Total	45	47	100.0	100.0

Source: 2006 Retail Study and Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

⁽²⁾ incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

The centre has a high proportion of convenience retailers but a lower proportion of comparison units when compared with the national average, as was the case in 2005. The proportion of A1 services and A2 services remains higher than the national average, while the proportion of A3/A5 uses is lower.

Retailer Representation

Daventry Road has a fairly limited selection of comparison shops (16). Table H.2 provides a breakdown of comparison shop units by category.

The centre does not contain any units within six of the Goad comparison categories, and the choice available in most categories is low. There is a good

provision of chemists, drug stores and opticians. The proportion of charity/second hand shops is high.

Table H.2 Daventry Road Breakdown of Comparison Units

Type of Unit	Daventry Road		% UK Average ⁽¹⁾
	Units	%	
Clothing and footwear	3	18.7	25.0
Furniture, carpets and textiles	0	0.0	7.4
Booksellers, arts, crafts and stationers	0	0.0	10.6
Electrical, gas, music and photography	1	6.3	9.4
DIY, hardware and homewares	1	6.3	6.4
China, glass, gifts and fancy goods	1	6.3	4.6
Cars, motorcycles and motor accessories	1	6.3	1.3
Chemists, drug stores and opticians	4	25.0	10.0
Variety, department and catalogue	0	0.0	1.6
Florists, nurserymen and seedsmen	0	0.0	2.3
Toys, hobby, cycle and sport	0	0.0	5.2
Jewellers	0	0.0	5.0
Charity/second hand shops	3	18.7	8.4
Other comparison retailers	2	12.5	2.9
Total	16	100.0	100.0

Source: Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

Daventry Road has a fair range of non-retail service uses (19), with all categories except Pubs/bars present and mostly well represented (see Table H.3).

Table H.3 Daventry Road Analysis of Selected Service Uses

Type of Unit	Daventry Road		% UK Average ⁽¹⁾
	Units	%	
Restaurants/café	3	17.6	23.3
Fast food/takeaways	1	5.9	15.2
Pubs/bars	0	0.0	7.6
Banks/other financial services	4	23.5	12.9
Betting shops/casinos	2	11.8	4.0
Estate agents/valuers	1	5.9	9.5
Travel agents	1	5.9	2.5
Hairdressers/beauty parlours	3	17.6	22.9
Laundries/dry cleaners	2	11.8	2.2
Sub-Total	17	100.0	100.0
Other A1 Retail Services	2		
Total	19		

Source: Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were three vacant retail units within Daventry Road at the time of the Coventry City Council 2013 Land Use Survey, giving a vacancy rate of 6.4%, below the national average of 12.1%. However, this is an increase from 2005 when there were no vacant units in the centre.

Summary of Daventry Road's Strengths and Weaknesses

Strengths

- The centre has a good range of small shops and services serving the day to day needs of local residents.
- The centre has a low vacancy rate, suggesting that the centre is relatively healthy.
- The centre is well connected via public transport.
- The adjacent Quinton Park contributes to the attractiveness of the centre.

Weaknesses

- The centre lacks an anchor store, such as a medium to large supermarket.
- The centre provides only a limited range of lower order comparison goods retailers, and has a high proportion of second hand/charity shops.

I. Earlsdon District Centre

Earlsdon is a linear centre situated to the south west of Coventry City Centre. The centre primarily serves the day-to-day shopping and service needs of local residents in the Earlsdon area. It is anchored by a Co-op food store. Its key roles include:

- *convenience shopping* – the convenience offer of the centre includes a Co-op store, One Stop convenience store plus specialist and independent food retailers.
- *comparison shopping* – the centre provides a reasonable selection of comparison retailers for a district centre.
- *services* – the centre contains banks, hairdressers, restaurants/café's and a number of pubs, plus a library and gallery.

Mix of Uses and Occupier Representation

Earlsdon has 59 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table I.1, compared against the national average.

Table I.1 Earlsdon Use Class Mix by Unit

Type of Unit	Units 2005	Units 2013	% of Total Number of Units	
			Earlsdon %	UK Average ⁽¹⁾
Comparison Retail	26	22	37.3	36.0
Convenience Retail	4	8	13.6	8.1
A1 Services ⁽²⁾	16	7	11.9	14.1
A2 Services	5	7	11.9	12.1
A3/A5 Restaurants/Takeaways	8	10	16.9	14.7
A4 Pubs/Bars	n/a	5	8.5	2.9
Vacant	3	0	0.0	12.1
Total	62	59	100.0	100.0

Source: 2006 Retail Study and Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

⁽²⁾ incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

The proportion of convenience retail units is significantly higher than the national average, which is typical for centres serving a predominantly walk in catchment. The provision of services within the centre is reasonable, and generally similar to the national averages, with the exception of the strong representation of A4 pubs/bars. There are no vacant units within the centre.

Retailer Representation

Earlsdon has a reasonable selection of comparison shops (22). Table I.2 provides a breakdown of comparison shop units by category. The centre provides retail units within ten of the Goad comparison categories, although the choice available in certain categories is low, and there is no representation within a few categories. There is a fairly high proportion of clothing and footwear; chemists, drug stores and opticians; and charity/second-hand shops.

Table I.2 Earlsdon Breakdown of Comparison Units

Type of Unit	Earlsdon		% UK Average ⁽¹⁾
	Units	%	
Clothing and footwear	5	22.7	25.0
Furniture, carpets and textiles	1	4.5	7.4
Booksellers, arts, crafts and stationers	0	0.0	10.6
Electrical, gas, music and photography	2	9.1	9.4
DIY, hardware and homewares	0	0.0	6.4
China, glass, gifts and fancy goods	2	9.1	4.6
Cars, motorcycles and motor accessories	0	0.0	1.3
Chemists, drug stores and opticians	4	18.2	10.0
Variety, department and catalogue	1	4.5	1.6
Florists, nurserymen and seedsmen	1	4.5	2.3
Toys, hobby, cycle and sport	2	9.1	5.2
Jewellers	1	4.5	5.0
Charity/second hand shops	3	13.6	8.4
Other comparison retailers	0	0.0	2.9
Total	22	100.0	100.0

Source: Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

Earlsdon has a fairly good range of non-retail service uses, with all categories present and some well represented (see Table I.3) reflecting the size of the centre and its service role in the shopping hierarchy. The proportions of restaurants/café, pubs/bars, banks/other financial services and laundries/dry cleaners are higher than the national average.

Table I.3 Earlsdon Analysis of Selected Service Uses

Type of Unit	Earlsdon		% UK Average ⁽¹⁾
	Units	%	
Restaurants/café	8	28.6	23.3
Fast food/takeaways	2	7.1	15.2
Pubs/bars	5	17.9	7.6
Banks/other financial services	4	14.3	12.9
Betting shops/casinos	1	3.6	4.0
Estate agents/valuers	2	7.1	9.5
Travel agents	1	3.6	2.5
Hairdressers/beauty parlours	3	10.7	22.9
Laundries/dry cleaners	2	7.1	2.2
Sub-Total	28	100.0	100.0
Other A1 Retail Services	1		
Total	29		

Source: Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were no vacant retail units within Earlsdon at the time of the Coventry City Council 2013 Land Use Survey. There were three vacant units in 2005.

Summary of Earlsdon's Strengths and Weaknesses

Strengths

- The centre has no vacant units, which indicates the centre is healthy, vital and viable.
- The centre has a good range of restaurants/cafes and pubs, suggesting a strong evening economy.
- The buildings are of good quality and the centre is generally well maintained.

Weaknesses

- On-street parking in the centre causes some congestion and impedes pedestrian flow.
- There is a limited choice of comparison goods retailers, and the centre lacks large retail units that would be suitable to accommodate national multiple retailers.

J. Foleshill District Centre

Foleshill is one of the largest district centres in Coventry, in terms of the number of units. It is situated to the north of Coventry and primarily serves the day-to-day shopping and service needs of local residents. Its key roles include:

- *convenience shopping* – the centre contains a number of small, independent convenience goods retailers and specialist ethnic food stores, primarily serving top up shopping trips.
- *comparison shopping* – the centre generally serves lower order comparison shopping needs, and a limited range of the type of goods sold within the centre.
- *services* – the centre includes several banks, estate agents, solicitors, restaurants/café's, takeaways, hairdressers and beauty salons. The centre also provides a dental practice.

Mix of Uses and Occupier Representation

Foleshill has 79 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table J.1, compared against the national average.

Table J.1 Foleshill Use Class Mix by Unit

Type of Unit	Units 2005	Units 2013	% of Total Number of Units	
			Foleshill %	UK Average ⁽¹⁾
Comparison Retail	29	23	29.1	36.0
Convenience Retail	9	13	16.5	8.1
A1 Services ⁽²⁾	9	8	10.1	14.1
A2 Services	11	15	19.0	12.1
A3/A5 Restaurants/Takeaways	6	11	13.9	14.7
A4 Pubs/Bars	n/a	1	1.3	2.9
Vacant	4	8	10.1	12.1
Total	68	79	100.0	100.0

Source: 2006 Retail Study and Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

⁽²⁾ incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

The number and proportion of with convenience retailers and A2 services within the centre has increased noticeably since 2005. The proportion of comparison goods retailers and A1 services has decreased, and is lower than the national average, while A3/A5 service uses are broadly similar to the national average.

Retailer Representation

Foleshill has a reasonable number of comparison shops (23), however the range of retailer types is relatively limited. Table J.2 provides a breakdown of comparison shop units by category.

Table J.2 Foleshill Breakdown of Comparison Units

Type of Unit	Foleshill		% UK Average ⁽¹⁾
	Units	%	
Clothing and footwear	4	17.4	25.0
Furniture, carpets and textiles	4	17.4	7.4
Booksellers, arts, crafts and stationers	0	0.0	10.6
Electrical, gas, music and photography	4	17.4	9.4
DIY, hardware and homewares	0	0.0	6.4
China, glass, gifts and fancy goods	2	8.7	4.6
Cars, motorcycles and motor accessories	0	0.0	1.3
Chemists, drug stores and opticians	4	17.4	10.0
Variety, department and catalogue	0	0.0	1.6
Florists, nurserymen and seedsmen	0	0.0	2.3
Toys, hobby, cycle and sport	0	0.0	5.2
Jewellers	4	17.4	5.0
Charity/second hand shops	0	0.0	8.4
Other comparison retailers	1	4.3	2.9
Total	23	100.0	100.0

Source: Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

Foleshill has a fairly good range of non-retail service uses, with all categories present except laundries/dry cleaners (see Table J.3). The proportion of banks/other financial services is much higher than the national average.

Table J.3 Foleshill Analysis of Selected Service Uses

Type of Unit	Foleshill		% UK Average ⁽¹⁾
	Units	%	
Restaurants/café	6	17.6	23.3
Fast food/takeaways	5	14.7	15.2
Pubs/bars	1	2.9	7.6
Banks/other financial services	12	35.3	12.9
Betting shops/casinos	1	2.9	4.0
Estate agents/valuers	2	5.9	9.5
Travel agents	2	5.9	2.5
Hairdressers/beauty parlours	5	14.7	22.9
Laundries/dry cleaners	0	0.0	2.2
Sub-Total	34	100.0	100.0
Other A1 Retail Services	1		
Total	35		

Source: Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were eight vacant retail units within Foleshill at the time of NLP's survey, giving a vacancy rate of 10.1%. While this is below the national average of 12.1%, there were only four vacant retail units in 2005.

Summary of Foleshill's Strengths and Weaknesses

Strengths

- The centre provides a selection of specialist and ethnic food stores.
- The centre is easily accessible by public transport, served by a number of bus routes and with bus stops located within the centre.
- The vacancy rate is lower than the national average.

Weaknesses

- The centre does not have a main anchor store such as a medium to large supermarket.
- The centre only provides a limited range of lower order, comparison goods retailers.
- The centre lacks large retail units that would be suitable to accommodate national multiple retailers
- The appearance of the centre is poor quality, with some of the façades in need of improvement.

K. Jardine Crescent District Centre

Jardine Crescent is one of the smallest designated district centres in Coventry, in terms of floorspace. It is situated to the west of Coventry and primarily serves the day-to-day shopping and service needs of local residents. The centre has a strong social community focus. It is anchored by a small Farmfoods supermarket. Its key roles include:

- *convenience shopping* – the centre includes a small Farmfoods store, a Greggs baker, deli and two small newsagents/convenience stores.
- *comparison shopping* – the centre only provides a small number of lower order comparison goods units.
- *services* – the centre includes a reasonable range of services for a small centre comprising two hairdressers, a café, two takeaways, a bookmakers, laundrette, post office and a library.

Mix of Uses and Occupier Representation

Jardine Crescent has 20 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table K.1, compared against the national average.

Table K.1 Jardine Crescent Use Class Mix by Unit

Type of Unit	Units 2005	Units 2013	% of Total Number of Units	
			Jardine Cr. %	UK Average ⁽¹⁾
Comparison Retail	6	5	25.0	36.0
Convenience Retail	3	5	25.0	8.1
A1 Services ⁽²⁾	3	4	20.0	14.1
A2 Services	1	1	5.0	12.1
A3/A5 Restaurants/Takeaways	3	3	15.0	14.7
A4 Pubs/Bars	n/a	0	0.0	2.9
Vacant	0	2	10.0	12.1
Total	16	20	100.0	100.0

Source: 2006 Retail Study and Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

⁽²⁾ incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

The centre has three times the national average proportion of convenience retailers, increasing by two units since 2005, whilst the proportion of comparison retailers is lower than the national average. The centre has above average A1 services and A3/A5 services, but A2 services are considerably below the national average.

Retailer Representation

Jardine Crescent has a very limited selection of comparison shops (5). The centre provides a DIY store, a chemist, a cycle store and two charity/second hand shops.

Service Uses

Jardine Crescent has a reasonable range of non-retail service uses for the size of centre, with five of the main categories present (see Table K.2).

Table K.2 Jardine Crescent Analysis of Selected Service Uses

Type of Unit	Jardine Crescent		% UK Average ⁽¹⁾
	Units	%	
Restaurants/café	1	14.3	23.3
Fast food/takeaways	2	28.6	15.2
Pubs/bars	0	0.0	7.6
Banks/other financial services	0	0.0	12.9
Betting shops/casinos	1	14.3	4.0
Estate agents/valuers	0	0.0	9.5
Travel agents	0	0.0	2.5
Hairdressers/beauty parlours	2	28.6	22.9
Laundries/dry cleaners	1	14.3	2.2
Sub-Total	7	100.0	100.0
Other A1 Retail Services	1		
Total	8		

Source: Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were two vacant retail units within Jardine Crescent at the time of Coventry City Council 2013 Land Use Survey, giving a vacancy rate of 10%. While this is below the national average of 12.1%, it is noted that there were no vacant units in 2005.

Summary of Jardine Crescent's Strengths and Weaknesses

Strengths

- The centre has a good provision of small convenience goods units catering for top up shopping trips.
- The centre has a pedestrianised shopping area, and movement is not impeded by traffic.
- The centre has a reasonable range of service and community facilities.
- The centre is well served by public transport.

Weaknesses

- The centre does not have a main anchor store such as a medium to large supermarket for main/bulk shopping trips.
- The centre only provides a very limited range of lower order, comparison goods retailers.

- The centre lacks larger retail units that could accommodate national multiple retailers.

L. Jubilee Crescent District Centre

Jubilee Crescent is situated to the north west of Coventry urban area, and primarily serves the day-to-day shopping and service needs of local residents in the Radford and Whitmore Park area. The centre has a strong social and community focus. It is anchored by an Asda supermarket and a Tesco Metro food store. Its key roles include:

- *convenience shopping* – in addition to the Asda and Tesco stores, the centre includes a greengrocer, butchers, Polish delicatessen and small newsagents/convenience stores.
- *comparison shopping* – the centre provides a number of lower order comparison goods units.
- *services* – the centre includes a limited range of services including hairdressers, takeaways, estate agents, travel agents, bookmakers, library, health centre and dental surgery.

Mix of Uses and Occupier Representation

Jubilee Crescent has 39 retail/service uses. The diversity of uses present in the centre in terms of the number of units is set out in Table L.1, compared against the national average.

Table L.1 Jubilee Crescent Use Class Mix by Unit

Type of Unit	Units 2005	Units 2013	% of Total Number of Units	
			Jubilee Cr. %	UK Average ⁽¹⁾
Comparison Retail	16	12	30.8	36.0
Convenience Retail	9	9	23.1	8.1
A1 Services ⁽²⁾	4	5	12.8	14.1
A2 Services	6	6	15.4	12.1
A3/A5 Restaurants/Takeaways	4	6	15.4	14.7
A4 Pubs/Bars	n/a	0	0.0	2.9
Vacant	1	1	2.6	12.1
Total	40	39	100.0	100.0

Source: 2006 Retail Study and Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

⁽²⁾ incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

The centre has a high proportion of convenience retailers when compared with national average. The proportion of comparison retailers is slightly below the national average and has reduced down by four units since 2005. There are no A4 pubs/bars within the centre.

Retailer Representation

The centre includes a limited range of comparison retailers (12), with only six of the Goad categories represented. Table L.2 provides a breakdown of comparison shop units by category. The centre has a high proportion of charity/second-hand shops.

Table L.2 Jubilee Crescent Breakdown of Comparison Units

Type of Unit	Jubilee Crescent		% UK Average ⁽¹⁾
	Units	%	
Clothing and footwear	0	0.0	25.0
Furniture, carpets and textiles	0	0.0	7.4
Booksellers, arts, crafts and stationers	0	0.0	10.6
Electrical, gas, music and photography	1	8.3	9.4
DIY, hardware and homewares	1	8.3	6.4
China, glass, gifts and fancy goods	0	0.0	4.6
Cars, motorcycles and motor accessories	1	8.3	1.3
Chemists, drug stores and opticians	3	25.0	10.0
Variety, department and catalogue	0	0.0	1.6
Florists, nurserymen and seedsmen	1	8.3	2.3
Toys, hobby, cycle and sport	0	0.0	5.2
Jewellers	0	0.0	5.0
Charity/second hand shops	5	41.7	8.4
Other comparison retailers	0	0.0	2.9
Total	12	100.0	100.0

Source: Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

Service Uses

Jubilee Crescent has a fairly reasonable range of non-retail service uses, with all categories present, except pubs/bars and laundries/dry cleaners (see Table L.3). There is a particularly high proportion of fast food/takeaways.

Table L.3 Jubilee Crescent Analysis of Selected Service Uses

Type of Unit	Jubilee Crescent		% UK Average ⁽¹⁾
	Units	%	
Restaurants/café	2	13.3	23.3
Fast food/takeaways	4	26.7	15.2
Pubs/bars	0	0.0	7.6
Banks/other financial services	2	13.3	12.9
Betting shops/casinos	2	13.3	4.0
Estate agents/valuers	2	13.3	9.5
Travel agents	1	6.7	2.5
Hairdressers/beauty parlours	2	13.3	22.9
Laundries/dry cleaners	0	0.0	2.2
Sub-Total	15	100.0	100.0
Other A1 Retail Services	2		
Total	17		

Source: Coventry City Council Land Use Survey 2013

⁽¹⁾ UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There was one vacant retail unit within Jubilee Crescent at the time of the Coventry City Council 2013 Land Use Survey, giving a vacancy rate of 2.6%, well below the national average of 12.1%. The vacancy rate has not changed since 2005.

Summary of Jubilee Crescent's Strengths and Weaknesses

Strengths

- The Asda store provides an anchor for the centre.
- The centre is located surrounding a large green space, which adds to the attractiveness of the centre.
- The buildings are relatively well maintained and attractive.
- The vacancy rate of the centre is low.

Weaknesses

- There is a limited choice of comparison goods retailers, and the centre has a high proportion of second hand/charity shops.
- The centre has a limited number of larger retail units to accommodate national multiple retailers.
- The centre experiences congestion in places.

Appendix 7 Household Survey Results

Household Survey Results

NEMS Market Research carried out a telephone survey of 1,500 households across the Coventry City study area in June 2014. The study area was split into eight zones, based on post code boundaries. The number of interviews undertaken reflects the population in each zone in order to provide statistically reliable sub-samples. The survey established patterns for the following:

- Main food and top up grocery shopping;
- Non-food shopping, including:
 - clothing and footwear;
 - domestic electrical appliances;
 - other electrical goods (TV, Hi-Fi and computers);
 - furniture, soft furnishing or carpets;
 - DIY/hardware items and garden items;
 - chemist, health and beauty items; and
 - other non-food items (e.g. books, CDs, DVDs, toys and gifts).

Main Food Shopping

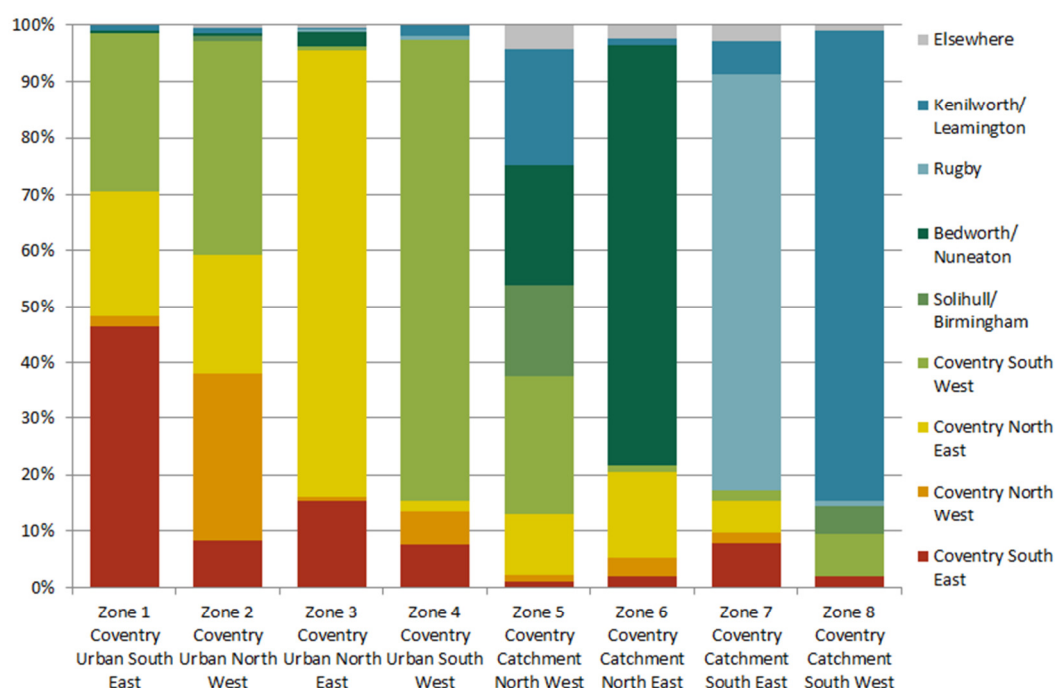
Respondents were asked where they last undertook their main food and grocery shopping. Large food stores are the primary destination for main food shopping trips across the study area. The market share of main food shopping for each zone is shown in Figure A below.

Overall, the Sainsbury's store on Fletchcampstead Highway, Canley was the most popular shopping destination for the study area as a whole (9.9%), followed by the Asda on Brade Drive, Walsgrave (6.8%), Morrisons on Holyhead Road (6.7%) and Tesco Superstore Walsgrave on Clifford Bridge Road (5.6%). The internet was used by 4.1% of respondents. Coventry North East and Coventry South West have high market shares (around 80%) of main food shopping within their local zones (Zones 3 and 4).

The inner catchment area zones (Zones 1-4) all retain over 97% of main shopping trips within the Coventry Urban Area. The Coventry Urban Zones (Zones 1-4) attract relatively few main food shopping trips from the outer catchment (Zones 5-8). 37.6% of main food shopping trips by respondents from Zone 5 are carried out in Zones 1-4, while 36.1% are carried out in Kenilworth/Leamington and 22.2% in Bedworth/ Nuneaton.

74.9% of respondents in Zone 6 carry out their main food shopping trips in Bedworth/Nuneaton, 74% of respondents in Zone 7 carry out their main food shopping trips in Rugby and 83.5% of respondents in Zone 8 carry out their main food shopping trips in Kenilworth/Leamington.

Figure A: Main Food Shopping



Source: NEMS Household Survey June 2014

Mode of Travel for Main Food Shopping

In the whole study area, 88.1% of respondents indicated that they travel to do their main food shopping by car (both driver and passenger) which is higher than the NLP average derived from similar surveys across the country (74.6%). In addition, a lower proportion walk to their main food shopping destination (5.7%) compared to the NLP average of 11.7%, and a lower proportion of households travel by bus (4.7%) compared to the NLP averages derived from other surveys of 8.6%.

Top-Up Food Shopping

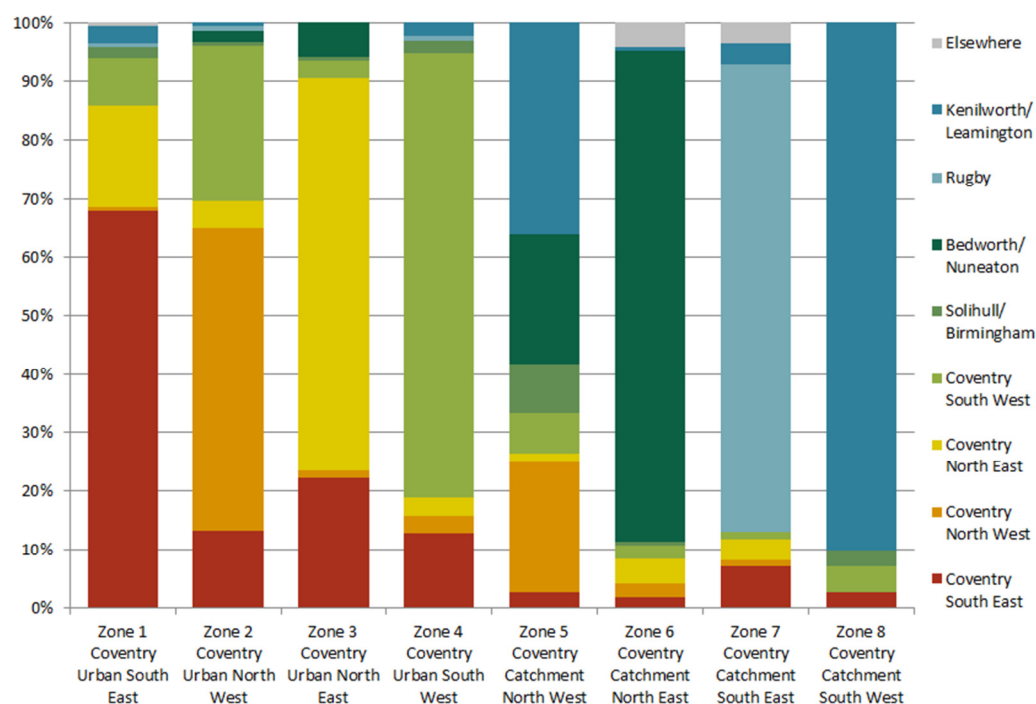
Top-up food shopping trips are normally made to supplement main food shopping trips and are undertaken on a more frequent basis for staples such as bread and milk. 68.6% of households across the catchment area indicated that they undertake small-scale or top-up shopping trips in addition to their main food shopping trips. The market share of top-up food shopping for each zone is shown in Figure B below.

The inner catchment area zones (Zones 1-4) all retain over 93% of main shopping trips within the Coventry Urban Area. The Coventry Urban Zones (Zones 1-4) attract relatively few main food shopping trips from the outer catchment (Zones 5-8).

The most popular destination for respondents in Zone 5 was Kenilworth/Leamington (36.1%) followed by Bedworth/ Nuneaton and Coventry North West (both at 22.2%). The vast majority of respondents from Zone 6 utilise

shops in Bedworth/Nuneaton for their top up food shopping (83.9%), while 80% of respondents in Zone 7 carry out their top up food shopping in Rugby. The overwhelming majority of respondents in Zone 8 carry out their top up food shopping in Kenilworth/Leamington (90.1%).

Figure B: Top Up Food Shopping



Source: NEMS Household Survey June 2014

Non-Food Shopping

Respondents were asked in which location they buy most of their household's non-food shopping. For the study area as a whole, Coventry City Centre was the most popular destination with 33.0% of all respondents shopping there, followed by Nuneaton (8.9%). 7.4% do most of their non-food shopping in Leamington Spa and 6.7% in Arena Park, Coventry.

Overall 4.3% of respondents buy most of their non-food shopping on the internet or have it delivered. The Coventry Urban South West zone has the highest proportion of respondents who buy most of their non-food shopping on the internet/by mail order (6.3%), followed by the Coventry Catchment South East zone (5.9%) and the Coventry Urban North East zone (4.7%). The Coventry Urban North West zone undertakes the lowest proportion of non-food shopping on the internet/by mail order (2.6%).

Mode of Travel for Non-Food Shopping

The predominant mode of travel for non-food shopping was the car (both driver and passenger) with 65.1% of respondents indicating that they use this form of

travel. The second most popular mode of transport for travelling to non-food shopping destinations was by walking (11.8%) followed by bus/coach (11.4%).

Non-Food Shopping Destinations

The household survey asked specific questions to probe which destinations respondents last visited to undertake particular types of non-food shopping. The market share for each category is shown in the graphs below and overleaf.

Figure C Clothing and Shoes

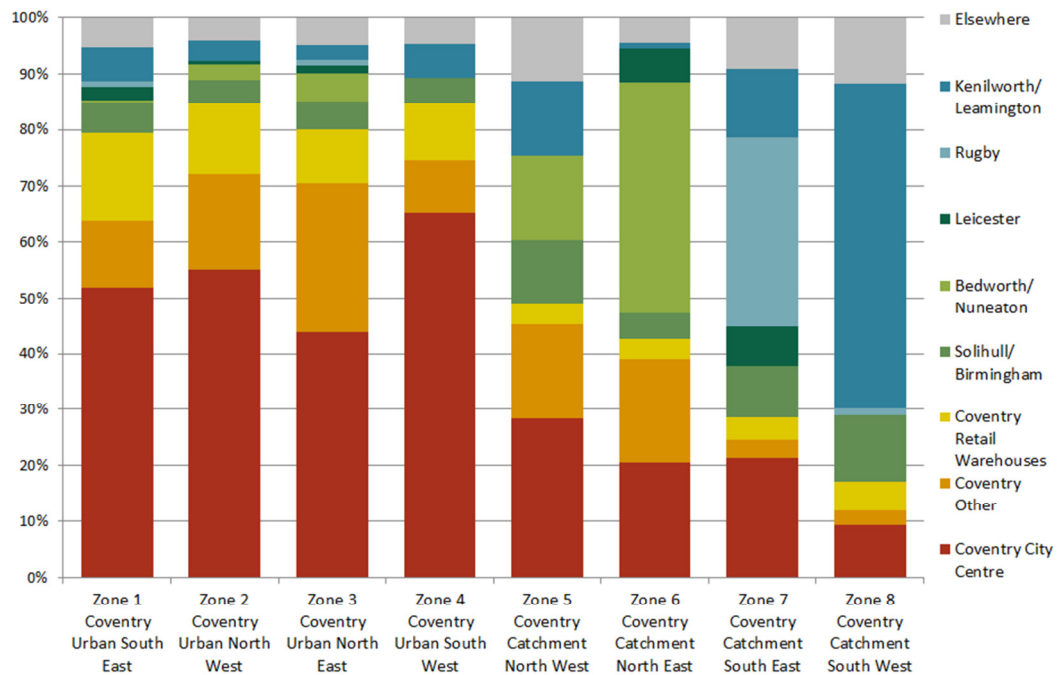
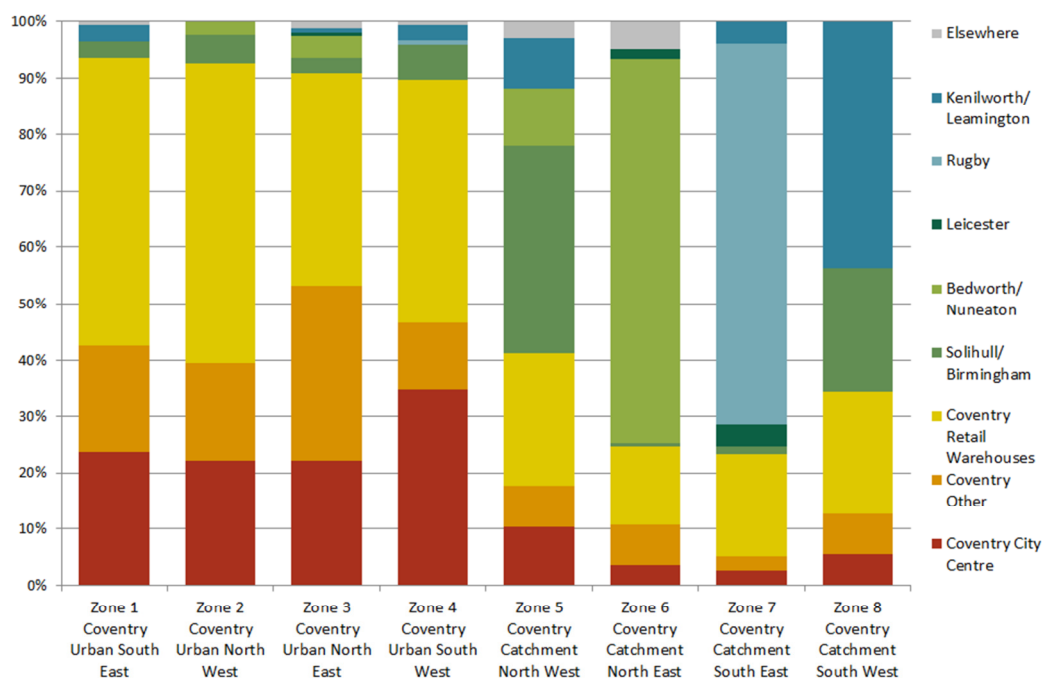


Figure D Domestic Electrical Appliances



Source: NEMS Household Survey June 2014

Figure E Other Electrical Goods

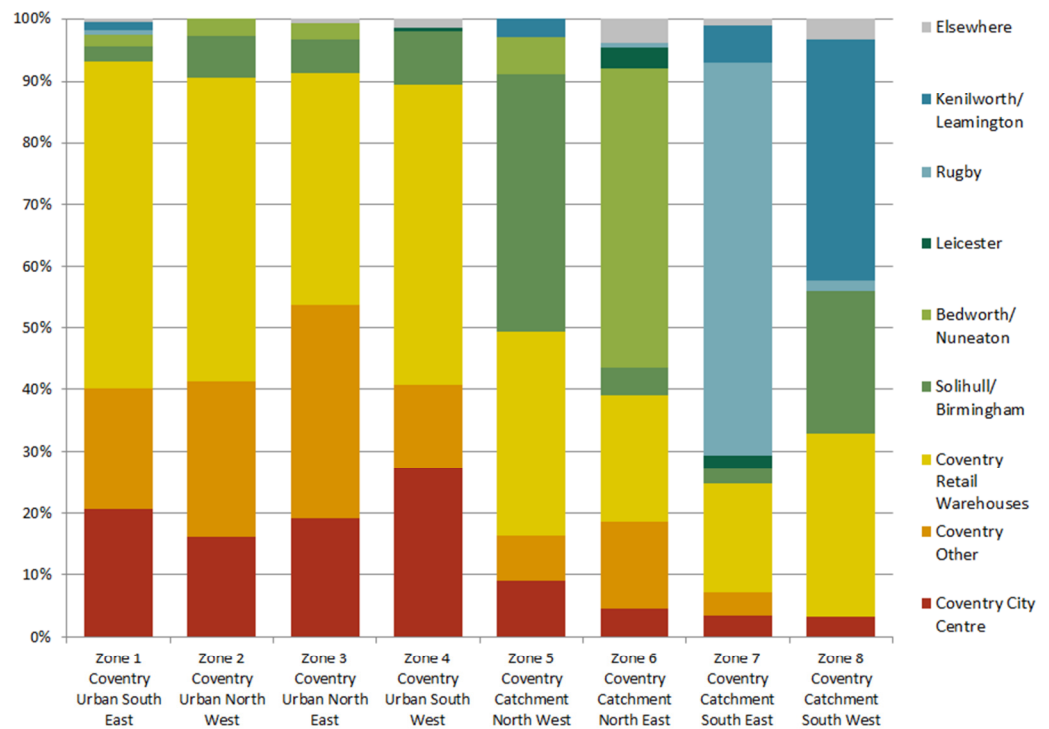
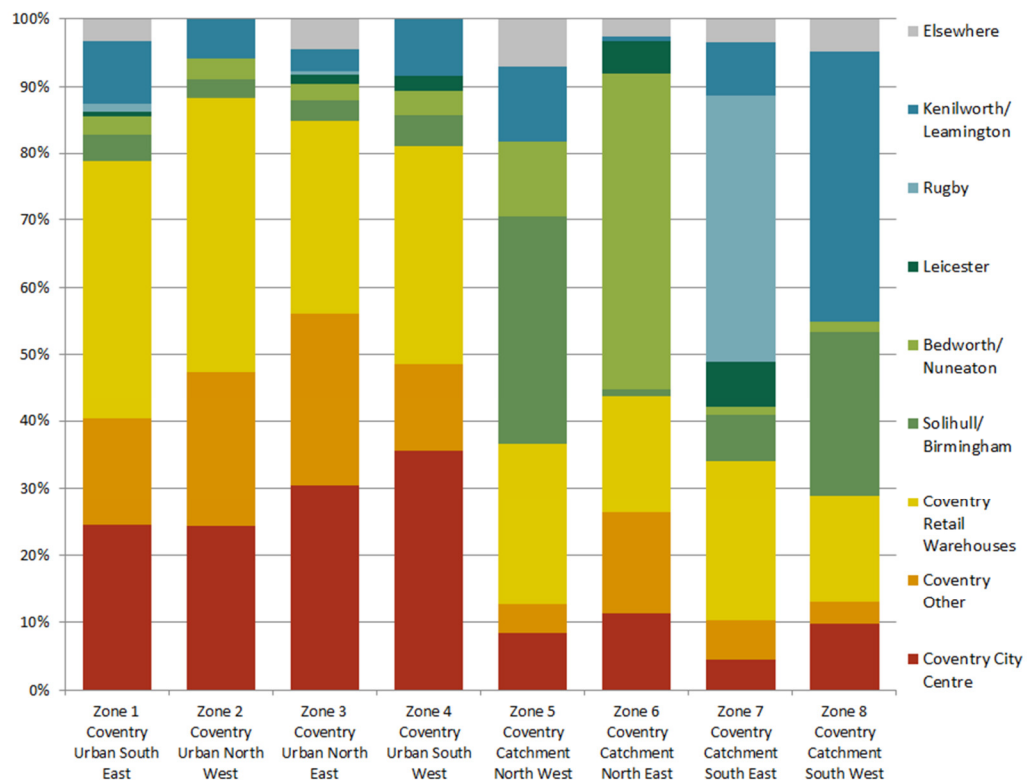


Figure F Furniture, Soft Furnishings and Floor Coverings



Source: NEMS Household Survey June 2014

Figure G DIY, Hardware and Garden Items

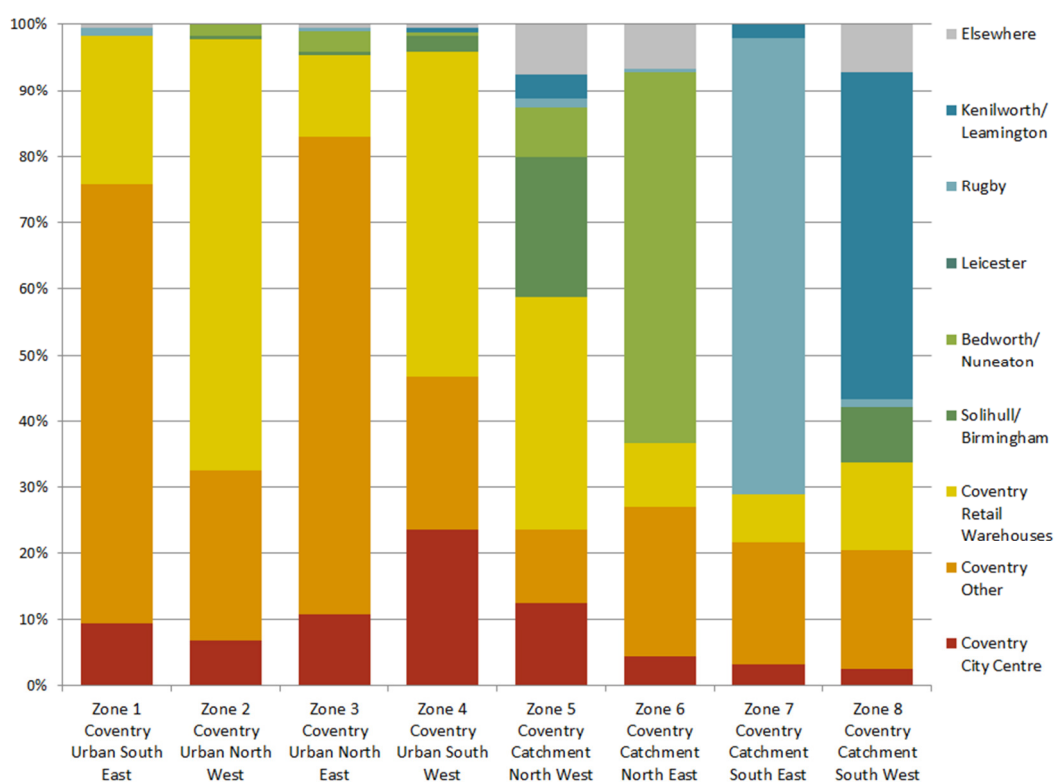
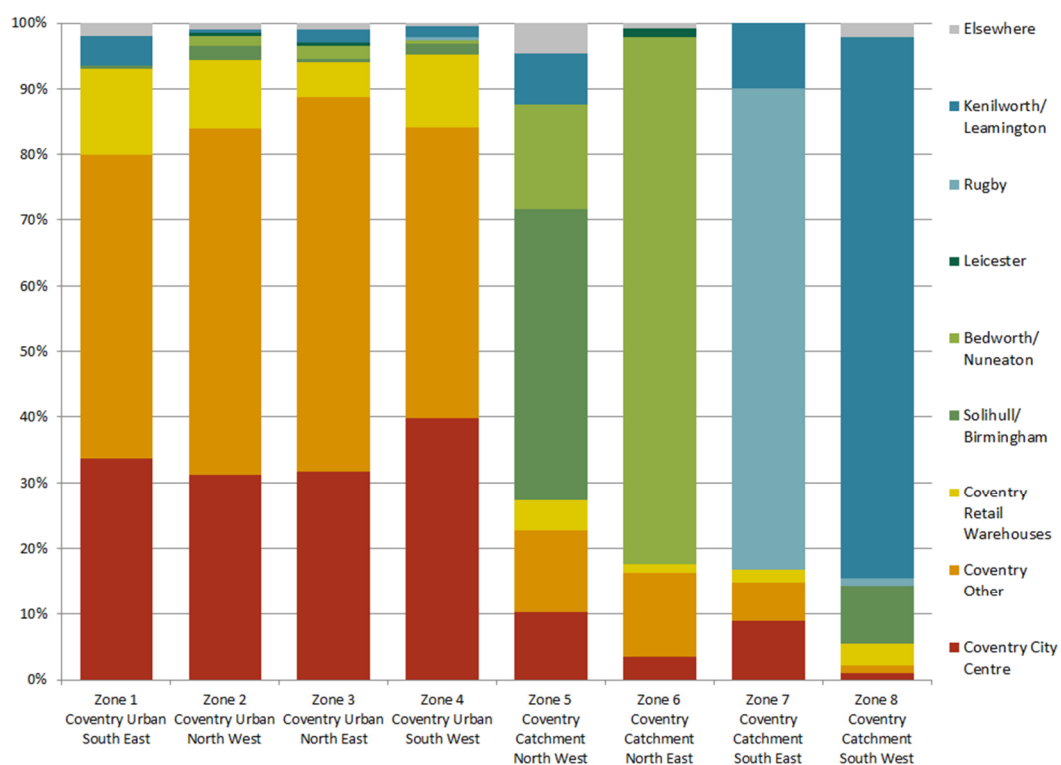
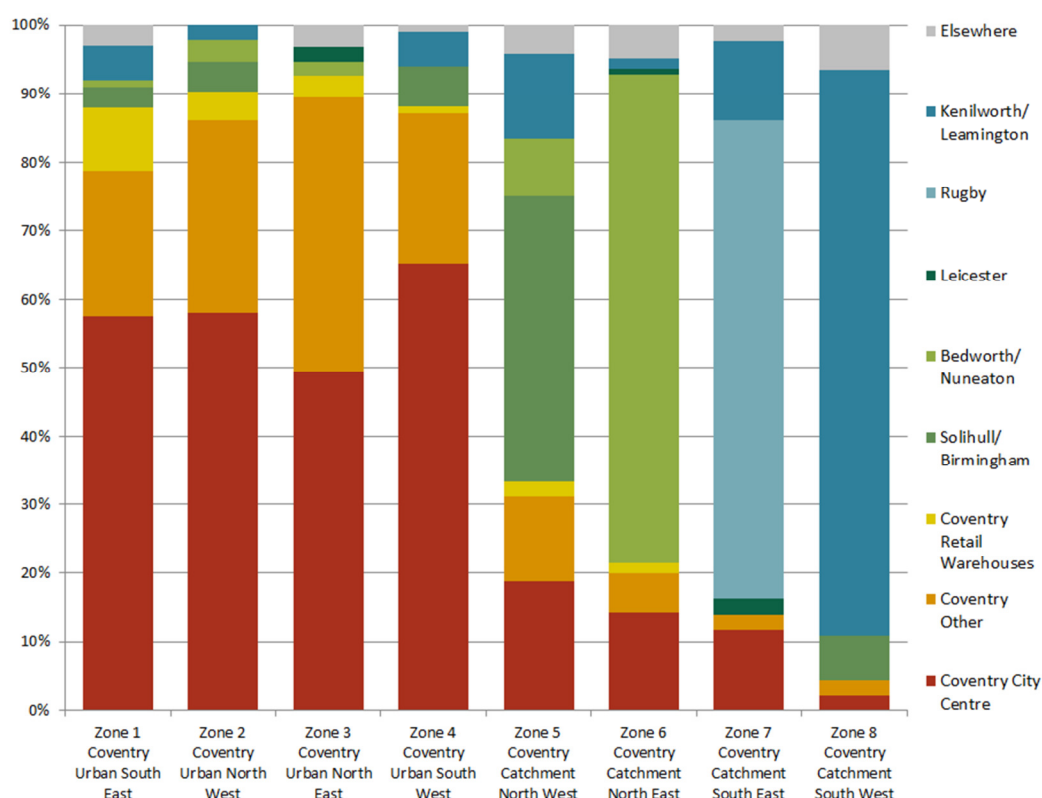


Figure H Health, Beauty and Chemist



Source: NEMS Household Survey June 2014

Figure I Books, CDs, Toys and Gifts



Source: NEMS Household Survey June 2014

Internet Shopping

Respondents were asked what goods they regularly buy on the internet. 36.2% stated that they did not regularly buy items on the internet. The most popular response was books and CDs (39.0%), clothes and shoes (24.6%) and electrical goods (14.2%). 5.4% regularly bought groceries via the internet. 36.2% stated that they do not regularly buy anything on the internet.

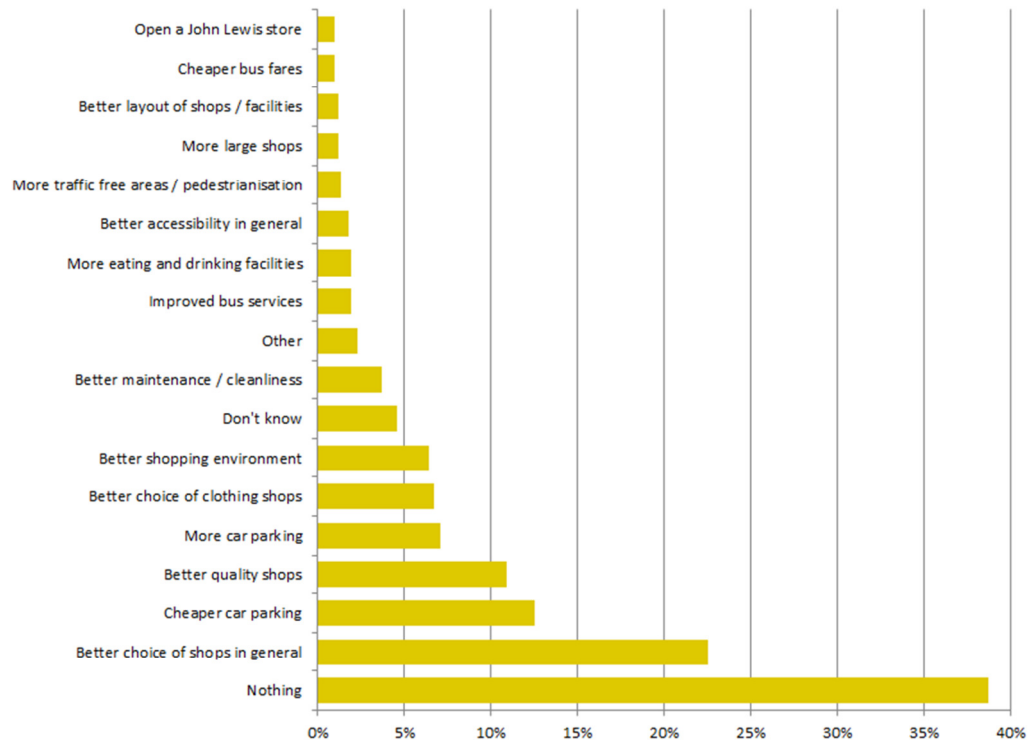
Shoppers' Views

The household survey asked respondents what would make them visit Coventry City Centre more often, the results are summarised in Figure J.

Over 22.5% of respondents indicated that a better choice of shops would make them shop more often in the City Centre, and 6.7% mentioned a better choice of clothing shops and 10.9% mentioned better quality shops. Other suggested improvements were cheaper car parking (12.5%), more car parking (7.1%), a better shopping environment (6.4%) and better maintenance/cleanliness (3.7%). A relatively high proportion (38.7%) suggested that nothing would make them visit Coventry city centre more often. This will include customers who already regularly shop in the City Centre, but many residents, particularly in the outer study area zones, indicated they would not visit the City Centre.

This could reflect negative perceptions of the City Centre and suggests radical improvements will be required to change these perceptions.

Figure J What would make people shop more often in Coventry City Centre

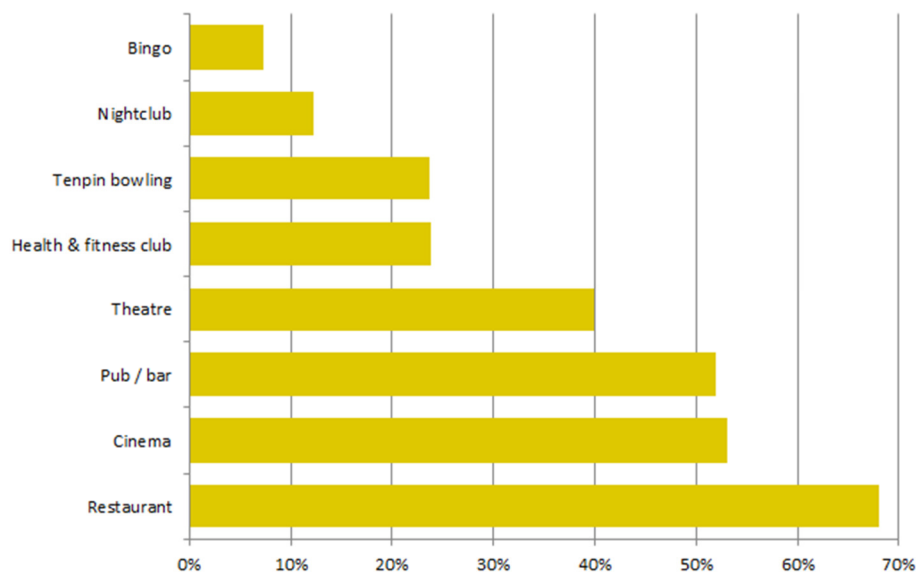


Source: NEMS Household Survey June 2014

Leisure Activities

Respondents were asked what leisure activities their family participate in. The graph below shows the most popular responses.

Figure K Leisure Activities

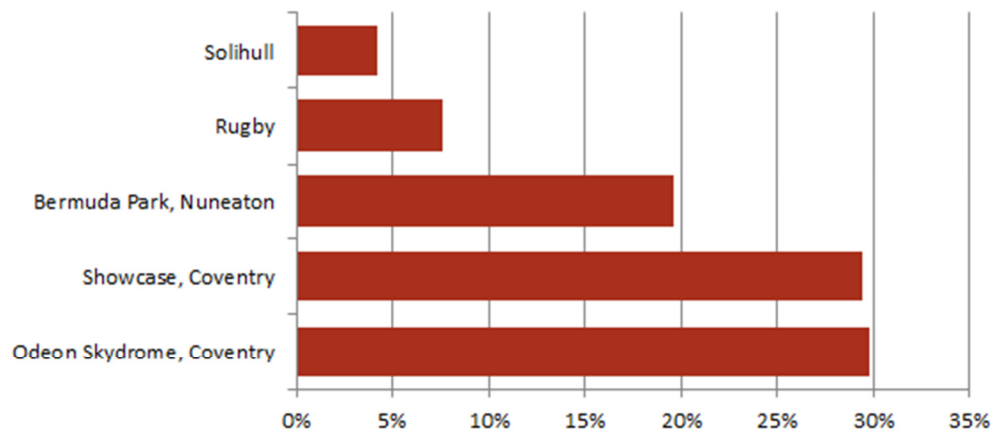


Source: NEMS Household Survey June 2014

Cinema

Respondents were asked which cinema they or their family last visited. 53.1% of respondents indicated that they visit the cinema which was the second most popular leisure activity after restaurants. This figure is just above NLP's average derived from similar surveys across the Country (51.0%). Of those respondents that visited the cinema, the most popular destination was Odeon Skydome Cinema, Coventry (29.8%) followed by Showcase Cinema, Coventry (29.4%). Bermuda Park, Nuneaton attracted 19.6% of the visits, Rugby attracted 7.6% of visits and Solihull attracted 4.2% of visits.

Figure L Visits to Cinemas

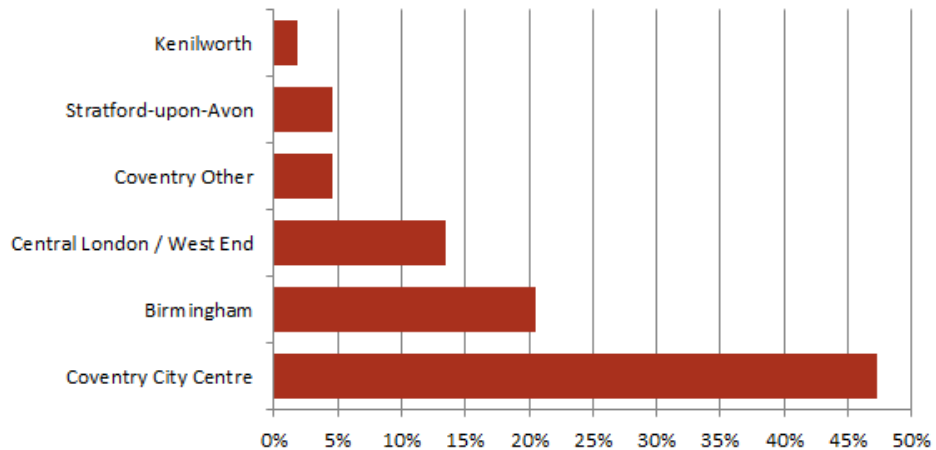


Source: NEMS Household Survey June 2014

Theatre

40% of respondents indicated that they visited theatres, and this is the fourth most popular leisure activity. This figure is just below NLP's average for other surveys of 42.5%. When asked where they had last visited the theatre, Coventry City Centre (47.3%) was the most popular location. Birmingham attracted 20.5% of visits and Central London / West End attracted 13.4% of visits.

Figure M Visits to Theatres

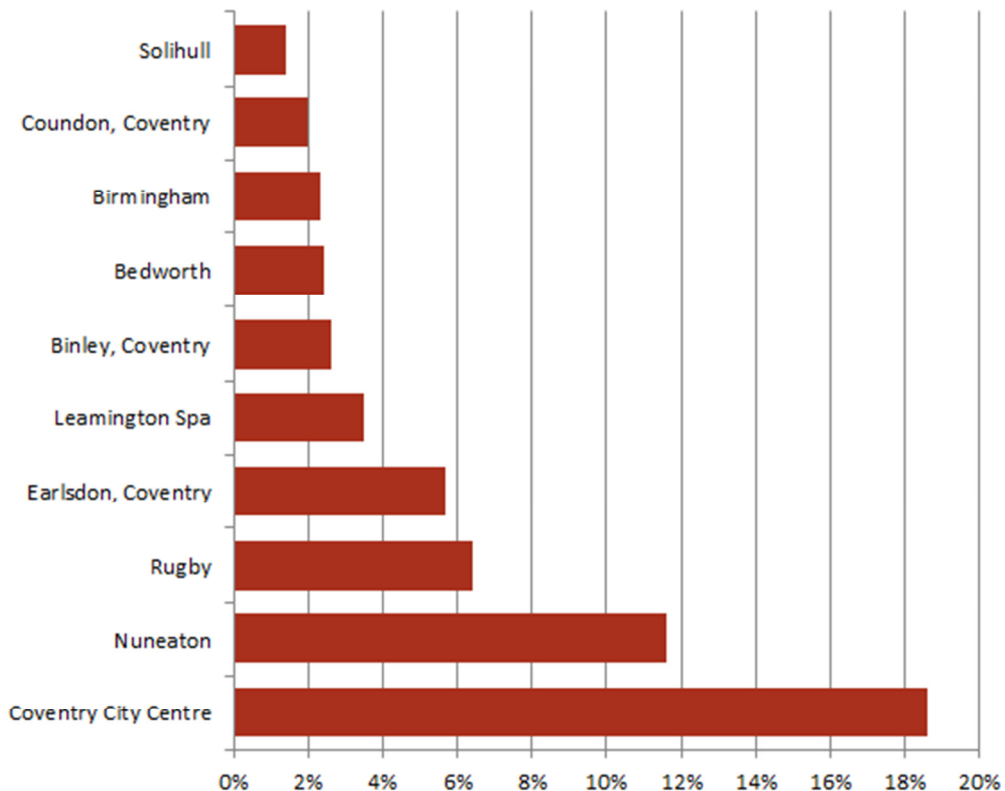


Source: NEMS Household Survey June 2014

Pubs/Bars

The household survey asked respondents if and where they or their family last visited a pub/bar and 51.9% of respondents indicated that they visited pubs/bars. This is higher than the NLP average from other surveys (47.5%). Overall, Coventry City Centre (18.6%) was the most popular destination, followed by Nuneaton (11.6%). Most people generally tended to visit pubs and bars according with the closest main centre within each zone. For example, out of the 18.6% of people who visited a pub/bar in Coventry, 89% of those people came from the inner catchment area (Zones 1-4).

Figure N Visits to Pubs/Bars

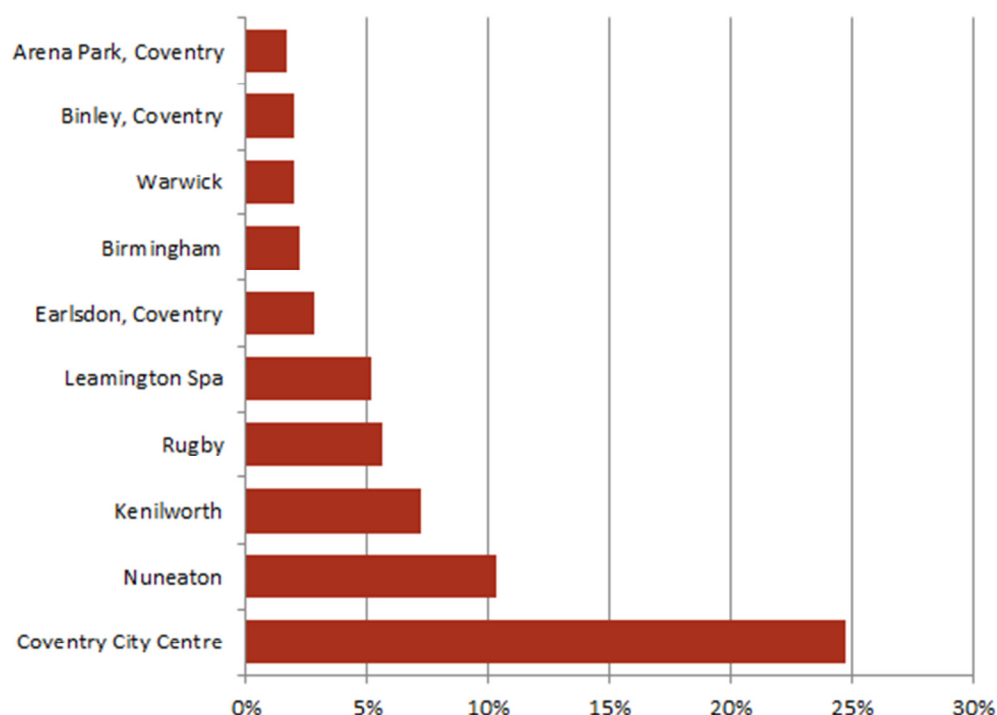


Source: NEMS Household Survey June 2014

Restaurants

Overall 68% of respondents indicated they visit restaurants which is the most popular leisure activity, and this is almost exactly the same as the NLP average for other surveys (67.9%). Of all the respondents who visited restaurants, Coventry City Centre (24.7%) attracted the highest proportion of respondents followed by Nuneaton (10.3%).

Figure O Visits to Restaurants

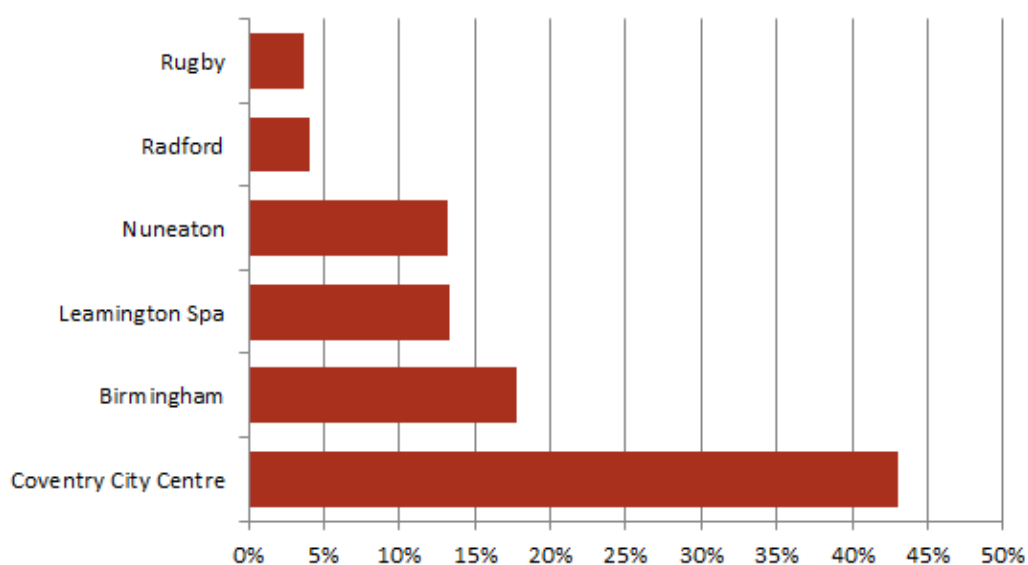


Source: NEMS Household Survey June 2014

Nightclubs

12.3% of respondents indicated that they had visited nightclubs. This participation rate is higher than the figure derived by NLP average from other similar surveys of 9.9%. The main location for respondents who last visited nightclubs in the study area as a whole is Coventry City Centre (43.1%) followed by Birmingham (17.7%), Leamington Spa (13.3%), Nuneaton (13.2%), Radford (4.1%) and Rugby (3.6%).

Figure P Visits to Nightclubs

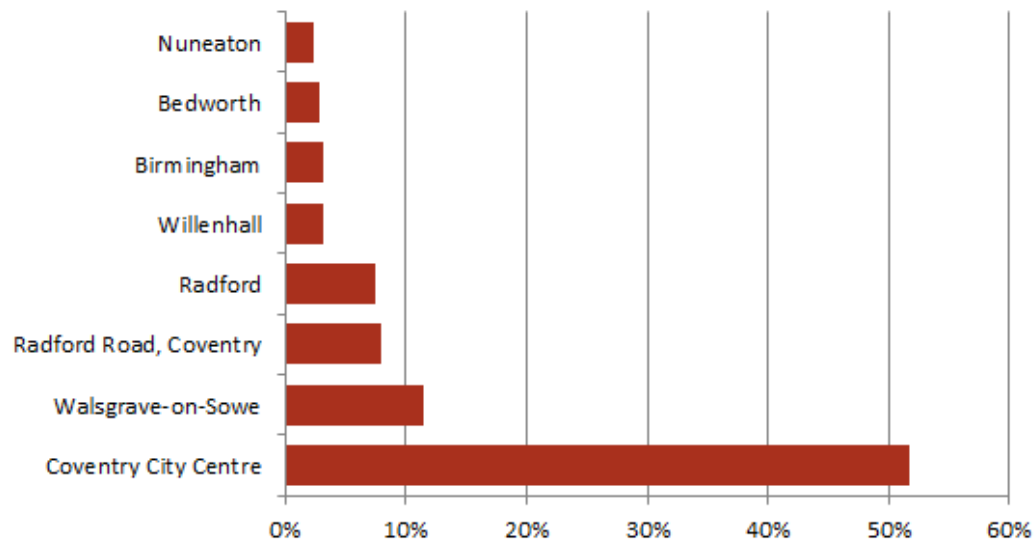


Source: NEMS Household Survey June 2014

Bingo

Bingo facilities were visited by 7.3% of respondents. This figure is above the NLP average participation rate of 5.1% as derived from other similar surveys. The sample of bingo visitors within each zone is relatively small. Coventry City Centre (51.8%) was the most popular place respondents went to play Bingo followed by Walsgrave-on-Sowe (11.4%).

Figure Q Visits to Bingo

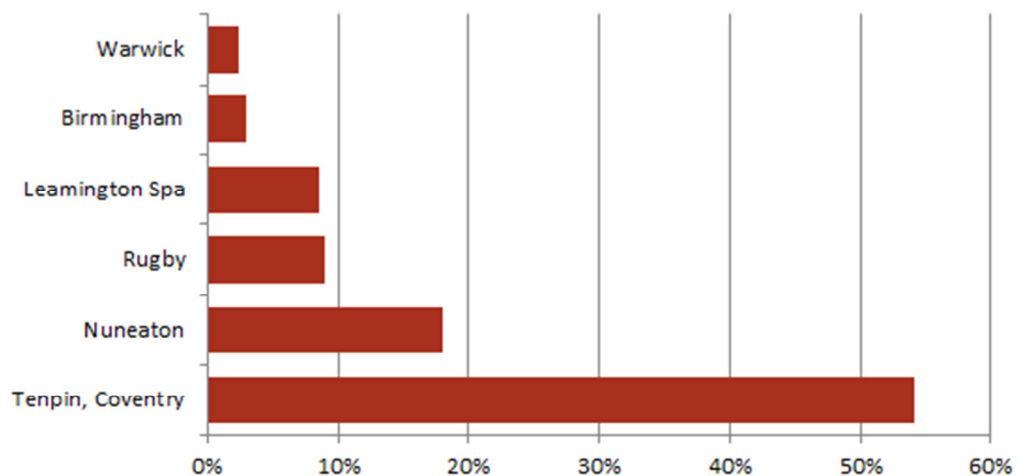


Source: NEMS Household Survey June 2014

Ten Pin Bowling

Overall 23.7% of respondents indicated their household visit ten pin bowling facilities, which is higher than the NLP average for other surveys (18.1%). The main destinations for tenpin bowling are Tenpin, Coventry (54.1%), Nuneaton (18.0%), Rugby (9.0%) and Leamington Spa (8.6%).

Figure R Visits to Ten Pin Bowling

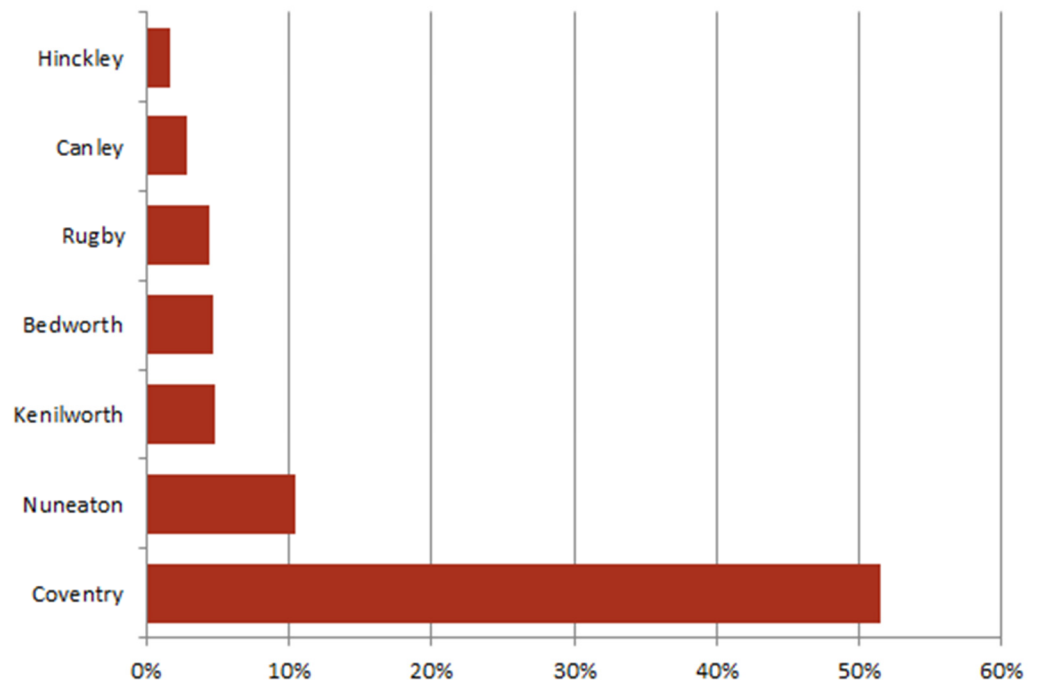


Source: NEMS Household Survey June 2014

Health and Fitness Clubs

23.8% of respondents indicated their household visited health clubs/gyms, which is slightly lower than the NLP average for other surveys (25.6%). The main health club and gym destinations for respondents were facilities in Coventry (51.5%), followed by Nuneaton (10.4%), Bedworth (4.7%), Rugby (4.4%), Canley (2.8%) and Hinckley (1.6%).

Figure S: Visits to Healthclubs/Gyms



Source: NEMS Household Survey June 2014



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