



Luton Borough Council

Retail Study Update

July 2015



WYG Planning & Environment,
5th Floor,
Longcross Court,
47 Newport Road,
Cardiff
CF24 0AD

Tel: 02920 829200

Email: planning.cardiff@wyg.com



Document Control

Project: Luton Retail Study Update 2015


Client: Luton Borough Council

Job Number: A090023

File Origin:

Document Checking:

Prepared by: Rob Mitchell	Signed: 
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Checked by: Rob Mitchell	Signed: 
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Verified by: Peggy Hui	Signed:
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Issue	Date	Status
1	July 2015	DRAFT
2	Sep 2015	FINAL ISSUE
3		
4		



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1.0 Introduction

1.1 Objectives of the Update

- 1.1.1 WYG Planning & Environment (WYG) was commissioned by Luton Borough Council in December 2014 to undertake an update of the Luton Retail Study Refresh (2012 Refresh) (hereafter referred to as 'the Update'). The objective of the Update is to provide an up-to-date picture of the retail capacity position in Luton since the Retail Study Refresh was completed in 2012.
- 1.1.2 The impetus behind an update to the 2012 Refresh capacity forecasts has been several important changes to population and expenditure information for Luton Borough. This necessitates a re-assessment of the quantitative and qualitative requirements for new retail floorspace in Luton over the forthcoming plan period 2011-2031.
- 1.1.3 In accordance with the agreed brief the objectives of the Update are to:
- Carry out an updated quantitative assessment of retail capacity for additional convenience and comparison floorspace, based on Luton Borough Council's latest population/ household projections¹ and up to date expenditure data;
 - Carry out an update of the Town, District and Neighbourhood Centres Assessment; and
 - Provide qualitative recommendations for developing a 'vision' for town centre enhancement.
- 1.1.4 To inform the Update WYG has carried out a comprehensive survey of existing operators within the borough. In addition, regard has been paid to existing published data sources such as Experian Goad, Venuescore and Estates Gazette and associated evidence base documents.
- 1.1.5 The following report should be considered as an Update to the 2012 Retail Study Refresh (WYG).

1.2 Structure of Report

- 1.2.1 The remainder of this report is structured as follows:
- Section 2 – Provides a review of the relevant planning policy context.

¹ derived from the Strategic Housing Market Assessment Update (SHMA) 2015



- Section 3 - Provides an updated assessment of the current vitality and viability of Luton town, district and neighbourhood centres;
- Section 4 – Considers current and future population and expenditure levels within the Study Area;
- Section 5 – Assesses the retail capacity for further convenience and comparison goods floorspace across the plan period 2011-2031 i.e. 2015, 2020, 2025, 2030 and 2031, taking into account expenditure growth; and
- Section 6 – Provides strategic recommendations for town centre enhancement.
- Section 7 – Provides a summary of conclusions

1.2.2 Experian Goad plans are provided as well as GIS compatible Study Area Plans and are appended as necessary.



2.0 Planning Policy Context

2.1 Introduction

- 2.1.1 In this section we set out a summary of the key national and local planning policy developments which have taken place since the completion of the 2012 Refresh.
- 2.1.2 Most significantly since the 2012 Refresh the Government has published its National Planning Policy Guidance (NPPG) which is intended to provide further guidance to policies contained within the National Planning Policy Framework (NPPF).
- 2.1.3 Since 2012 Luton Borough Council has further progressed its emerging Local Development Plan (LDP) having completed a Draft local Plan consultation in the summer of 2014 and is publishing a Pre submission plan in the autumn of 2015.

2.2 National Planning Policy Framework (NPPF, 2012)

- 2.2.1 The National Planning Policy Framework (NPPF) outlines the Government's planning policies for England. It replaced all previously issued Planning Policy Statements (PPSs) and Planning Policy Guidance Notes (PPGs) with a single national planning policy document. A review of the relevant provisions of the NPPF is provided in the 2012 Refresh.
- 2.2.2 One of the key objectives of the NPPF is to engender a planning system committed to securing sustainable economic growth in order to create jobs and prosperity.
- 2.2.3 Paragraph 23 of the NPPF relates to retail policy and vitality of town centres. In drawing up Local Plans, Local Planning Authorities (LPAs) should:
 - recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
 - define a network and hierarchy of centres that is resilient to anticipated future economic changes;
 - define the extent of town centres and primary shopping areas, based on a clear definition of
 - primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;



- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive; and
- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability.

2.3 National Planning Practice Guidance (NPPG, 2014)

2.3.1 In 2014 the Government published the National Planning Practice Guidance (NPPG), in order to provide further guidance to policies contained within the NPPF. The NPPG is a 'live' web-based resource intended to be actively managed and updated and subject to regular review by the Department for Communities and Local Government (DCLG).

2.3.2 In the section 'Ensuring the vitality of town centres' the DCLG advocate a positive vision or strategy for town centres, articulated through the Local Plan, is key to ensuring successful town centres which enable sustainable economic growth and provide a wider range of social and environmental benefits.

2.3.3 Any strategy should be based on evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality. Strategies should answer the following questions:

- What is the appropriate and realistic role, function and hierarchy of town centres in the area over the plan period?
- What is the vision for the future of each town centre? This should consider what the most appropriate mix of uses would be to enhance overall vitality and viability.
- Can the town centre accommodate the scale of assessed need for main town centre uses? This should include considering expanding centres, or development opportunities to enable new development or redevelop existing under-utilised space.
- In what timeframe should new retail floorspace be provided?



- What complementary strategies are necessary or appropriate to enhance the town centre and help deliver the vision for its future, and how can these be planned and delivered?
- How can parking provision be enhanced and both parking charges and enforcement be made proportionate, in order to encourage town centre vitality?
- Strategies should identify changes in the hierarchy of town centres, including where a town centre is in decline.

2.3.4 The NPPG also provides further guidance in terms of the interpretation of the NPPF’s sequential and impact tests (discussed above), including how they should be applied to both plan-making and decision-taking. A stage-by-stage guide to undertaking an impact test is also provided.

2.4 Local Development Plan

Luton Borough Local Plan 2001-2011

- 2.4.1 The “saved” policies of the Luton Local Plan adopted March 2006 remain part of the statutory development plan pending the adoption of the emerging Local Plan 2011-2031.
- 2.4.2 The Borough Council wishes to ensure that all residents have access to adequate and appropriately located food and non-food retail provision, while ensuring that new retail development is consistent with the aims of national retail policy.
- 2.4.3 Policy S1 stipulates the need for a sequential approach to site location and the appropriate scale of development in relation to relevant centres. Town centres will be followed by edge-of-centres sites and then district and local shopping centres, finally by out-of-centre locations that are accessible by a choice of means of travel.
- 2.4.4 Paragraph 7.43 of the local plan identifies two sites allocated to accommodate convenience and comparison retail floorspace over the plan period. The Northern Gateway site (land between the Arndale centre and the bus/rail station) - identified for a comprehensive development scheme incorporating additional retail floorspace; and the Power Court area - identified for a mixed use shopping area including significant non-bulky goods retail floorspace, will effectively form extensions to the town centre under policies CA5 and CA7 respectively.
- 2.4.5 Paragraph 7.47 notes the town centre’s primary shopping area should be identified for predominantly Class A1 retail uses, but there should be scope for more flexibility within the



secondary shopping areas. In view of the function and status of the Arndale (now the Mall) Shopping Centre, and the need for it to be fully integrated with the rest of the town centre shopping area, it is identified as the premier shopping frontage, in which there is a more restrictive approach to the introduction of non-retail uses.

2.4.6 In addition to Luton Town Centre paragraph 7.49 identifies the area’s designated District Centres which comprise: Bury Park, High Town, Marsh Road, Stopsley, Sundon Park, and Wigmore. The Purley Centre in Marsh Farm is recognised as a Local Centre, but may be identified as a District Centre when redeveloped. A further 43 Local Centres are identified at paragraph 7.51 which presently make up the remainder of the local retail hierarchy.

2.5 Other Material considerations

Luton Local Plan (2011-2031) (Draft June 2014)

2.5.1 The emerging Luton Local Plan 2011–2031 sets out a proposed set of policies, development allocations and actions to meet the environmental, social and economic challenges facing the Borough over the next 20 year plan period.

2.5.2 Draft Strategic Objectives include:

- Strategic Objective 4: To establish an effective network and hierarchy of town, district and neighbourhood centres to serve as the heart of local communities and improve health through improved access by train, bus, walking and cycling to a mix of uses including shopping, services and jobs.
- Strategic Objective 6: Reduce social, economic and environmental deprivation, particularly where it is spatially concentrated, by taking priority measures to reduce unemployment, improve skills and education and renew housing, community and environmental conditions.
- Strategic Objective 8: Improve accessibility, connectivity, sustainability and ease of movement to, from and within the borough.

2.5.3 The local plan stipulates additional retail floorspace should be directed to Power Court and the Creative Quarter within the Town Centre and to Marsh Farm District Centre in line with the sequential approach set out in the NPPF. This will serve to further reinforce the network of the Town Centre and District, Neighbourhood and Local Centres across the borough. A modest allocation for a



foodstore at Birdsfoot Lane (South) will support the strategic upgrading of this centre to Neighbourhood Centre status.

- 2.5.4 Draft Policy LP21 sets out the local centre hierarchy. It states proposals for retail, leisure and other main town centre uses, as defined in the NPPF, will be subject to the sequential test.
- 2.5.5 Applications for retail, leisure and office development over 2,500sqm located outside of town centres, not in accordance with this Local Plan, are required to submit an impact assessment, as defined in the NPPF.
- 2.5.6 The Council will grant planning permission for retail development, provided it is demonstrated that:
 - i. individually or cumulatively with other retail proposals, net additional convenience and comparison floorspace in the borough would not significantly exceed the identified quantitative need over the plan period; and
 - ii. retail proposals meet the sequential test; and
 - iii. The vitality and viability of the Town centre, and individually, each District and Neighbourhood centres in the borough would not be adversely affected by the development either on its own or in combination with other proposals or commitments.
- 2.5.7 Draft Policy LP22 defines the premier, primary and secondary shopping frontages which are the prime focus for i) convenience retail; ii) comparison (non bulky) retail floor space; and iii) other town centre uses as defined in the NPPF, which promote jobs, leisure and the night time economy. Within the premier, primary and secondary frontages development of non A1 town centre uses will be strictly controlled.
- 2.5.8 Draft Policy LP23 states the Council will approve planning applications which help to deliver and reinforce a network of mixed use District and Neighbourhood centres (which promote linked trips to local shops and services via public transport, walking and cycling) according to the centre hierarchy.

2.6 Relaxation of Permitted Development Rights

- 2.6.1 At a national level, recent changes to the Town and Country Planning (General Permitted Development) Order 1995 have sought to support the diversification and vitality of town centres. The changes follow the Portas Report recommendation to make it easier to change surplus space in order to provide for the effective re-use of buildings.



- 2.6.2 The Town and Country Planning (General Permitted Development) (England) Order 2015 came into force on 15 April 2015 which consolidates numerous amendments to the GPDO. It provides, for a temporary period (ending on 30th May in 2016 when conversions must be 'ready to occupy') , for the change of use of Use Class B1 offices to residential without the need for planning permission. The Order also provides for the temporary change of use (for up to two years) of uses falling within Use Classes A1, A2, A3, A4, A5, B1, D1 and D2 to uses falling within Classes A1, A2, A3 and B1, subject to the use relating to no more than 150sqm of floorspace and subject to the temporary provision not previously being relied upon.
- 2.6.3 Permitted development rights have been further extended to provide for certain additional changes of use without the need for planning permission. The first provides for the change of use of premises and land from Use Class A1 to use as a 'deposit taker' (effectively comprising banks, building societies, credit unions and friendly societies). The second provides for the change of use from Use Classes A1 and A2 to residential. There are certain restrictions as to where and when the rights can be exercised. The intended consequence of such measures is to secure the redevelopment and reuse of premises.

2.7 Conclusion

- 2.7.1 National planning policy highlights the need to promote the vitality and viability of town centres through a town centre first approach and a defined retail hierarchy. Applicants for main town centre uses are required to pass the sequential approach to site selection and provide a full assessment of the impact of the proposal on the vitality and viability of protected centres (for applications greater than 2,500sqm, or a locally set threshold).
- 2.7.2 The saved policies of the Luton Local Plan adopted March 2006 remain part of the statutory development plan pending the adoption of the emerging Local Plan 2011-2031. The local plan identifies two sites allocated to accommodate a convenience and comparison retail floorspace over the plan period. The Northern Gateway site (land between the Mall centre and the bus/rail station) and the Power Court area will effectively form extensions to the town under policies CA5 and CA7 respectively.



3.0 Assessment of Key Retail Centres

3.1 Introduction

3.1.1 As set out in the 2012 Refresh town centre 'Health Checks' can be used to measure vitality and viability. Accepted health check indicators can reliably be used to ascertain the health of a particular centre. These indicators include the following:

- **Diversity of uses** | Data on the diversity of uses in the town centre and the district and local centres was collated during our surveys in January 2015.
- **Proportion of vacant street level property** | Vacant properties were identified during the undertaking of the surveys.
- **Commercial yields on non-domestic property** | Data on commercial yields is not available publically at this time.
- **Customers' views and behaviour** | Information on customers' views is based on the NEMS household survey results².
- **Retailer representation and intentions to change representation** | Information on the current strength of centres, retailer representation and retailer requirements has been derived from Venuescore's UK Shopping Venue Rankings and from other published sources.
- **Commercial rents** | Zone A rental data has been sourced from Estates Gazette Interactive (EGi) and Colliers International, who are widely recognised sources of such data.
- **Pedestrian flows** | General footfall and pedestrian flows were observed during the undertaking of the centre surveys.
- **Accessibility** | Consideration of access to and around each centre is informed by WYG's surveys.
- **Perceptions of safety and occurrence of crime** | A general perception of safety was gathered during the undertaking of the surveys and is supplemented by the NEMS household survey results.

² Commissioned as part of 2012 Refresh



- **State of town centre environmental quality** | Consideration of the quality of the buildings and public realm in each of the centres has also been informed by WYG’s ‘on the ground’ observations.

3.1.2 In line with our brief WYG has carried out an update of the 2012 Refresh health checks. The following commentary provides an overview of our updated analysis of the health of Luton’s town centre. Health checks of District and Neighbourhood centres are appended. As in the 2012 Refresh the commentary is supplemented by a more detailed appraisal of available data relating to the centres’ performance and of our observations in revisiting and re-surveying each centre.

3.2 Sub Regional Hierarchy

3.2.1 A plan showing the location of the Study Area relative to the main settlements in the sub-region is included at **Appendix 1**.

3.2.2 VENUESCORE provides a ranking of shopping centres in the UK based on the provision of multiple retailers and anchor store strength. The index establishes various grades of retail venues, ranging from ‘Major City’ to ‘Local’. The index provides a useful starting point in understanding the relative importance of the Study Area’s main towns within the sub-region, and how shopping patterns in the area may be influenced by competing facilities located in neighbouring districts.

3.2.3 In 2013, an additional 695 multiple retailers were added to the VENUESCORE methodology reflecting the growing importance of food retailers such as Wetherspoons, All Bar One, Harris & Hoole and Pieminister.

**Table 1.0: Sub-regional Shopping Hierarchy**

Centre	Classification	Venuescore 2014 ³	Rank 2014	Rank 2011	Rank 2010	Rank 2006
Milton Keynes	Major Regional	301	34	39	35	34
Watford	Major Regional	256	49	47	43	40
Luton	Regional	208	79	110	115	113
Bedford	Regional	186	105	117	130	110
St Albans	Regional	167	130	123	115	n/a
Stevenage	Regional	151	156	127	124	124
Welwyn Garden City	Sub Regional	150	157	199	185	141
Hemel Hempstead	Regional	144	165	150	135	n/a
Aylesbury	Regional	143	170	132	104	104
Hitchin	Major District	98	270	279	277	n/a
Hatfield (Galleria)	Minor District	71	403	442	298	n/a
Dunstable	Major District	68	422	264	294	n/a
Leighton Buzzard	District	54	549	592	n/a	n/a
Harpenden	Minor District	54	549	719	n/a	n/a
Bletchley	Major District	50	601	231	n/a	n/a

Source: Venuescore 2006, 2010, 2011, 2014. Centres in Study Area highlighted in blue.

3.2.4 The above table confirms Luton remains the highest ranking centre in the Study Area. Its ranking has improved since 2011, but remains lower than the most notable Major Regional Centres in the sub-region, Milton Keynes and Watford (around 40km and 30km driving distance from Luton respectively). Shopping patterns in the Study Area are likely to continue to be strongly influenced by the greater strength, diversity and attractiveness of the retail offer at these higher-order centres. Residents of Dunstable, Hatfield (Galleria) and Hitchin are also likely to continue to look to Milton Keynes and Watford in the first instance given the relative size, locations and offers of these towns. However, the latest rankings suggest Luton is the strongest Regional centre in the sub-region which many shoppers should look to as a viable retail destination.

³ The 2010 figures above provide a retrospective ranking of Javelin Venue based on consistent geographic definition of venue and scoring system (2010 retailer presence data) this is different to previously published VENUESCORE 2010 rankings. The previously published Retail Study Refresh 2012 Table 4.1 has therefore been adjusted to account for the changes to application of Venue Score rankings in relation to the geographic definition of shopping venues in the most recent Venue Score rankings for 2014-15.



3.3 Luton Town Centre

- 3.3.1 The town centre defined by Goad remains similar in extent to the Town Centre Shopping Area defined by Luton Borough Council in the local plan, with the exception of units along New Bedford Road to the north and King Street (included by GOAD). For consistency the Goad Plan area is taken as a proxy for the town centre retail area. An updated Experian Goad Plan of Luton Town Centre is attached at **Appendix 2** for reference.
- 3.3.2 Generally there has been no fundamental change in the retail environment since a health check audit of town centre units was carried out in 2012. There remains a wide mix of uses within the Central Area with the primary shopping area at its core. The town centre comprises around 413 units totalling circa 95,360sqm of floorspace. The key retail and service activity remain concentrated along both sides of the pedestrianised George Street, the covered Mall shopping centre and the pedestrian links between these two areas.
- 3.3.3 The Mall is designated Premier retail frontage and is still the main focus for shopping activity. It consists of approximately 122⁴ retail units (including recent extension) with space for temporary retail stalls. It is served by its own adjoining multi-storey car park.

Table 1.1: Composition of Luton Town Centre

	Units 2005 (%)	Units 2008 (%)	Units 2012 (%)	Units 2014 (%)	No. of Units 2015	Units 2015 (%)	Units UK (%)
Convenience	6	6	6	7	30	7	9
Comparison	43	40	34	33	153	37	40
Service	38	40	39	39	166	40	37
Vacant	10	11	18	18	57	14	12
Miscellaneous	3	3	2	3	10	2	1
Total	100	100	100	100	415	100	100

Source: Experian Goad data April 2014. WYG survey update 2015.
 Previous years' figures taken from Experian Goad data.
 UK average GOAD January 2015. Figures may not add due to rounding.

- 3.3.4 The table provides a breakdown of Luton's town centre composition, including previous years' figures for comparison. With respect to convenience provision Luton has maintained a marginal increase in representation (as a proportion) since 2005. In regard to comparison provision similarly

⁴ Figure can fluctuate due to tenancy requirements i.e. combined/ split units.



there has been a marginal increase, albeit still below the national average (41%). At 40% service uses remain above the UK average (37%).

3.3.5 While the proportion of vacancies (14%) remains slightly above the UK average (12%) there has been a reduction since 2012/15 (18%)⁵. Miscellaneous uses make up 2% of town centre units, above the UK average (1%).

Table 1.2: Floorspace Composition of Luton Town Centre

	Floorspace 2012 (sqm)	Floorspace 2012 (%)	Floorspace 2015 (sqm)	Floorspace 2015 (%)	Units UK average (%)
Convenience	10,480	11	10,800	11	18
Comparison	47,280	48	49,980	52	45
Service	26,800	27	25,080	26	25
Vacant	12,200	12	7,890	8	11
Miscellaneous	1,840	2	1,610	2	1
Total	98,600	100	95,360	100	100

Source: Experian GOAD - UK average Feb 2015

3.3.6 The above table provides a breakdown of floorspace by GOAD class within the town centre. There has been little discernable change since 2012. Convenience floorspace provision remains at 11%, below the UK average.

3.3.7 Comparison floorspace representation in the town is above the UK average by 7%. Notable national retailers with presence include Debenhams, Marks and Spencer, Primark, TK Maxx and Boots, all of which occupy large floorplate units in the recently extended Mall shopping centre.

3.3.8 Service floorspace in the town is at 26%, is slightly above the national average. The vacant floorspace within the town is below the national average at 8% (national average 11%). 2% of floorspace in the town is occupied by miscellaneous units.

⁵ The 2005 level of 10% remains the lowest recorded

**Table 1.3 Breakdown of Town Centre Comparison Units**

Type of Unit	2012 Total	2015 Total	2015 (%)	UK Average (%)
Clothing & Footwear	44	51	33.6	24.9
Furniture, carpets & textiles	5	4	2.6	8.3
Booksellers, arts, crafts & stationers	20	20	13.2	10.5
Electrical, games, music, photography	21	22	14.4	9.1
DIY, hardware and homewares	6	5	3.3	6.0
China, glass, gifts and fancy goods	2	0	0	4.2
Cars, motorcycles and motor accessories	1	2	1.3	2.9
Chemist, drugstore & opticians	17	19	13.2	9.7
Variety, department & catalogue	9	9	5.8	1.5
Florists, nurserymen & seedsmen	1	0	0	2.2
Toys, hobby, cycle, sport	5	10	6.6	5.0
Jewellers	6	7	4.6	4.8
Charity, pets and other	7	4	2.6	10.6
Total	144	153	100	100

Source: WYG 2015, UK average Experian Goad, Jan 2015
 Figures may not add due to rounding

3.3.9 The table above provides further breakdown of the comparison uses in the town centre with 2012 figures provided for comparison. Overall as was the case in 2012 there is broadly a good mix of comparison uses in the centre. The main difference since 2012 being an increase in clothing and footwear representation and a lack of china goods and florist representation. There is high representation of variety/department and catalogue stores. As would be expected the highest proportion of representation is clothing and footwear units - representation accounts for 33.6% of comparison units, albeit this is well above the national average (24.9%).



Table 1.4 Breakdown of Town Centre Service Units

Type of Unit	2012 Total	2015 Total	2015 (%)	UK Average (%)
Restaurant, café, takeaways & pubs	70	72	43.9	45
Banks & financial and other services	23	19	11.6	12.68
Estate agent & valuers	22	26	15.9	10.52
Travel agents	2	2	1.2	2.91
Hairdressers & beauty parlours	41	44	26.8	26.4
Laundries & dry cleaners	2	1	0.6	2.43
Total	160	164	100	100

Source: WYG 2015, Experian Goad, Feb 2015
 Figures may not add due to rounding

3.3.10 The table above provides a breakdown of service unit representation in the centre with 2012 figures provided for comparison. There has been some minor variations in the preceding years. All of the main service uses remain represented in the centre to a greater or lesser extent and broadly reflect national averages. Typically, restaurant/café and takeaways still make up the highest proportion of service representation (43%). Hairdressers and beauty parlours, and banks and financial services etc are still also well represented.

Retailer Representation

3.3.11 The Mall remains the focus for the leading multiple comparison retailers. Notable occupiers include: Primark, Debenhams, Marks & Spencer, Top Shop, River Island, Superdrug and Boots Chemist. Other notable comparison retailers located along George Street include BHS, Bon Marche ladieswear and Savers.

3.3.12 National multiples and variety stores continue to act as key attractors to Luton, amidst competition from nearby higher-order centres such as Milton Keynes, Watford and Stevenage. The proportion of comparison units in the town centre remains slightly below the national average; that stated, comparison representation as a proportion of town centre floorspace is markedly higher than the national average (table 1.2).

3.3.13 A significant increase in representation in Luton town centre from large department stores or mixed-good retailers, and other national multiples seeking large format premises is considered to remain unlikely without significant investment in bringing forward potential retail development sites. WYG note there has not been any large-scale investment in new, purpose built large-floorplate premises



in the intervening years since the 2012 Refresh (and the Mall extension) and it remains the case that there is limited opportunity for retailers requiring such premises to locate within the primary shopping area. This continues to limit Luton town centre’s ability to increase its competitiveness as a major shopping destination in the sub-region.

3.3.14 In the convenience sector, the only notable foodstore in the town centre remains the Tesco Metro store (circa 1,530sqm/ 16,469 sq ft). As identified in the 2012 Refresh a store of this size and format is primarily intended to cater for top-up shopping however in the absence of similar alternatives the store is observed to be performing above this function. The town centre continues to be represented by frozen food specialists Iceland and Farmfoods at Park Street and is also served to a lesser extent by a Lidl and Sainsbury’s at Dunstable Road (Bury Park) which, while being north of the A6 ring road, are within walking distance. The centre continues to cater for a good range of smaller, independent stores. It remains the case that the town centre would benefit from the delivery of the proposed Northern Gateway and Power Court and sites to accommodate additional retail provision. In particular, the primary retail area would benefit from a large foodstore able to cater for main food shopping.

3.3.15 The service sector remains characterised by a typical range of national banks and building societies; familiar names on most UK high streets, including: NatWest, Lloyds TSB, HSBC, Halifax, Santander and Nationwide. There are also numerous food takeaways and a reasonable selection of restaurants. Uses are generally well dispersed throughout the town centre with a higher concentration of service uses along George Street, Manchester Street and in particular Upper George Street and Wellington Street.

Rental values

3.3.16 Set out below is a table showing the comparative position of Luton Town Centre and surrounding towns, in respect of Zone A rental values, derived from information in the Estates Gazette Town Centre Report with the data sourced by Colliers International.

**Table 1.5: Comparative Rental Values⁶.**

Town Centre	2007 (£/sq ft pa)	2008 (£/sq ft pa)	2009 (£/sq ft pa)	2010 (£/sq ft pa)	2011 (£/sq ft pa)	2012 (£/sq ft pa)	2013 (£/sq ft pa)
Milton Keynes	£275	£275	£275	£240	£240	n/a	n/a
Luton	£180	£180	£135	£135	£130	£145	£145
St. Albans	£140	£145	£130	£130	£130	£130	£130
Hitchin	£100	£100	£95	£95	£95	£85	£85
Stevenage	£115	£115	£80	£80	£80	n/a	n/a
Bedford	£105	£105	£80	£80	£75	n/a	n/a
Hemel Hempstead	£75	£80	£65	£55	£55	£45	£45
Dunstable	£65	£70	£35	£35	£30	£30	£30

Notes: Based upon Colliers opinion of the open market Zone A rent⁷.
Study Area based centre highlighted in blue

- 3.3.17 Zone A rents relate to a hypothetical shop unit of optimum size and configuration in the prime pitch. The figures have been arrived at by adopting standard zone sizes for the location and are expressed at £ per sq ft per annum.
- 3.3.18 The above table indicates that Luton remains ranked 2nd behind Milton Keynes in the Study Area. The fall in Zone A rental values within Luton experienced since 2009 has recently been arrested, and that growth in rental values has been seen for the most recently available years 2012-2013 (i.e. +£15 per sq ft). Conversely, Hitchin has seen a drop in rental values in 2012-13. Rental values in Dunstable have remained constant since 2011.

Proportion of Vacant Street level property

- 3.3.19 The proportion of vacant units in the town centre peaked in 2012-2014 at 18%. The vacancy level has since decreased and stands at 14% (as a proportion of total units) which is more in line with the UK average (at 12%). This decrease may be a modest indication of improved local retail conditions. With respect to distribution, there is a high concentration at Cheapside, Wellington Street and King Street. It is noted Cheapside lies at the heart of what constitutes the Northern Gateway area - as it stands vacant units (7) constitute 50% of total vacant units (14). This concentration of vacancies gives this area of the centre a particularly rundown feel. Similarly a large proportion of units at King

⁶ Estates Gazette Town Centre Report

⁷ Colliers only acknowledge presence of shopping centres once completed and open to the public.



Street are vacant. This area sits within the Goad defined town centre area and is contiguous with George Street (within the Conservation Area). This area remains a priority for town centre regeneration.

- 3.3.20 There has been recent investment in pedestrianising Guildford Street and planned improvements to Bute Street, access to the Station Quarter and railway station. Proposals include a new one-way system for Guildford Street and Cheapside with the creation of a shared open space from the pedestrian signal crossing on Station Road through to Guildford Street junction with Bute Street. Vehicular access is to be restricted to provide pedestrians with a safer and more pleasant environment.
- 3.3.21 The vacancy rate in the Mall has halved to 7 units since 2012. Site visits to the Mall reveal a largely buoyant shopping environment. The largest 'anchor' units are all occupied and were observed to be trading strongly.
- 3.3.22 The town centre's vacancy rate is marginally above the national average in both unit numbers and as a proportion of floorspace. However this does not give pressing cause for concern. Further analysis suggests the centre's vacancy rate is largely attributable to a high proportion of small, secondary units. There are no large, prominent vacant units in the primary shopping frontage, with the exception of the old cinema on George Street. The former ABC Cinema site is notable as a longstanding vacant unit. The unit occupies a favourable position in the centre benefitting from strong footfall. Despite this it is understood there are no current plans for its redevelopment.
- 3.3.23 There has been a reduction in the centre's unit vacancy rate since 2012 albeit vacant floorspace *as a proportion* of the centre remains relatively constant. The vacancy rate is broadly in line with the UK average.

Pedestrian Flows

- 3.3.24 The comments below are based on observations of flows at different periods of the day and on different days of the week.
- 3.3.25 As in previous studies (2005, 2009 and 2012) observed footfall remains at its highest along the ground floor of The Mall. The pedestrianised areas of George Street and Park Street are also busy. The redevelopment of St George's Square continues to stimulate pedestrian activity around this area of the centre.



3.3.26 Generally high levels of footfall were observed during the day. The designated Premier/ Primary shopping frontage remains the focus of pedestrian activity centred on The Mall and George Street.

3.3.27 Recent investment into Guildford Street has revitalised this once vehicular dominated environment into a pedestrianised area. Guildford Street now forms a granite paved open space forming part of the Town Centre Transport Scheme. A range of new seating, cycle parking and planting boxes have been positioned along the street improving the overall setting.

Accessibility

3.3.28 Primary access to the town centre continues to be via the Ring Road. The majority of traffic passes from the south via Gypsy Lane and the north via Hatters Way and Dunstable Road. The centre is still observed to be prone to congestion at peak periods which may deter visitors as noted in previous studies⁸.

3.3.29 The main car parks serving the **town centre** include:

- The Mall car park - 840 spaces approx;
- Bute Street Car Park – 237 spaces;
- Dunstable Place NCP - 72 spaces approx;
- Silver Street pay & display - 40 spaces approx; and
- Luton Train Station multi-storey - 740 approx.

⁸ BMG Research. Luton Town Centre Surveys: Executive Summary, Aug 2012 (pg.17)



Table 1.6 Public Town Centre Car Parks – Summary Schedule

Car Parks	Maximum Stay	Charging times	Charge	
Victoria Street George Street West King Street Wellington Street Adelaide Street Buxton Road	Upper George Street Gordon Street Alma Street Inkerman Street Guildford Street Cheapside Park	2 hours	8am-6pm Monday to Saturday	Up to 2 hours £4.50
Bute Street (237 spaces)	5 hours	8am – 6 pm Monday to Sunday	Up to 5hours Saturday Sunday/Bank holidays	£3.50 £2.20 £1.10
Silver Street (52 spaces)	5 hours	8am – 6 pm Monday to Sunday	Up to 5 hours Sunday/Bank holidays	£5.00 £1.40
Chapel Viaduct	10 hours	Public use weekends/bank holidays only	Up to 5 hours Sunday/Bank holidays	£3.50 £1.40
Vicarage Street (178 spaces)	24 hours	8am – 6 pm Monday to Sunday	Up to 5 hours 10 hours Saturday Sunday/Bank holidays	£3.20 £6.70 £2.20 £1.00
Power Court	24 hours	8am – 6 pm Monday to Sun	All Day	£2.00

Source: www.luton.gov.uk

- 3.3.30 The Council implement parking fines of either £50 or £70 for its public pay and display car parks depending on the level of contravention which may be a disincentive for use for many visitors, although private run car parking near the town centre (Mall and Regent Street) tends to offer substantially higher parking capacity and is not subject to such enforcement
- 3.3.31 It is understood the multi-storey car park at Library Road (640 spaces) has since closed. Notwithstanding this, the centre is still considered to be relatively well catered for in terms of parking provision which is considered to be competitively priced.
- 3.3.32 Luton’s railway station proximity to the primary retail area means it is readily accessible. Despite this, previous studies indicate relatively low train usage for town centre visits⁹ however, since those studies arose at a time when works associated with the guided busway and interchange caused disruption with bus stop closures on Station Road - whereas opening of the guided busway and

⁹ BMG Research. Luton Town Centre Surveys: Executive Summary, Aug 2012 (pg.17)



interchange has subsequently seen significant increase in bus operations and a further travel centre has opened in 2015, all of which are likely to see increased passenger numbers. Future aspirations for regeneration of the north of the city centre will also seek to ensure full integration of the railway station in order to encourage more sustainable forms of travel to the city centre and help ease local traffic congestion.

3.3.33 Church Street, Silver Street, Chapel Street and the Galaxy Centre were identified in 2012 as key destinations for those travelling by bus¹⁰ and this is considered to remain the case. The centre remains accessible via a number of transport modes but still appears prone to traffic congestion, particularly on the ring road, and at peak periods. Previous studies have revealed low railway usage¹¹ to visit the centre which belies its proximity to the main primary retail area. Cheaper fares are likely to encourage greater numbers of visitors to use public transport¹². In 2012 the Council’s Town Centre Survey study found 33% of respondents travel to the centre by foot¹³. In the absence of significant changes to the accessibility profile of the centre in the intervening years this is likely to remain broadly accurate.

Perceptions of Safety

3.3.34 The Town Centre Survey 2012¹⁴ showed clear differences in the perceptions of safety for visitors during the daytime and night-time hours. A high response rate was observed perceiving the centre to be safe during the day. Conversely two fifths considered the centre to be unsafe after dark¹⁵. In terms of the primary retail area, street drinkers and beggars, aggressive charity workers and gangs of youths were highlighted as giving the most concern.

3.3.35 The Council commissioned Perceptions Study (2012) identified The Mall, George Street and Galaxy/Mill Street as being perceived to be generally the safest locations. The Mall/Galaxy Centre benefits from private security in addition to high levels of footfall and natural surveillance. The location perceived to be the least safe is the railway station.

3.3.36 Overall respondents indicated ease and safety of movement throughout centre as generally good i.e. pedestrian crossings safe to use and pedestrian areas are well lit.

¹⁰ Ibid

¹¹ Ibid

¹² BMG Research. Luton Town Centre Surveys: Executive Summary. (pg.15)

¹³ BMG Research. Luton Town Centre Surveys: Executive Summary. (pg.9)

¹⁴ BMG Research. Luton Town Centre Surveys: Executive Summary. (pg.9)

¹⁵ BMG Research. Luton Town Centre Surveys: Executive Summary, Aug 2012 (pg.6)



3.3.37 There has been little change in the town centre built environment since 2012 and in the absence of significant changes in intervening years these findings are similarly likely to remain accurate. The centre is, for the most part, well lit and monitored by a combination of private security/surveillance and mostly discrete CCTV as part of the Council's town centre management, which comprehensively monitors both the town centre and other district centres¹⁶.

3.3.38 Natural surveillance can significantly allay fears of safety and maintaining a low vacancy rate is helpful in ensuring high levels of street activity/footfall which in turn helps counteract any perceived 'no-go' areas.

Environmental Quality

3.3.39 The Mall shopping centre remains well invested. The Mall was observed as tidy, free from litter, well maintained and generating substantial footfall. The Mall is still considered to provide a pleasant shopping destination. An extension of the Mall has improved the frontage onto George Street and St George's Square which has enhanced the streetscene and provided greater visitor attraction to both the Mall and other parts of the centre i.e. Galaxy Entertainment Centre.

3.3.40 There has been recent refurbishment of the George Street paving fronting the Mall which remains generally tidy, free from litter and pedestrian friendly. Shrub planting, street furniture and temporary stalls continue to encourage activity on foot. The Town Hall and War Memorial at the top of George Street are both well maintained and continue to provide attractive local landmarks which add character to the centre.

3.3.41 The environmental quality to the north of the centre the (surrounding Guildford Street and Silver Street i.e. 'Northern Gateway') remains the area in most need of attention. WYG note outline proposals for the redevelopment of this area have previously been secured¹⁷. Currently the high vacancies and lack of active frontage reinforce the area's peripheral nature. Notwithstanding this, recent investment has been carried out on the pedestrianisation of Guildford Street, planned improvements to Bute Street and proposals to introduce a one-way system and shared open space to create a more pedestrians friendly environment. A new Sustainable Travel/Visitor Centre is shortly due to open at this location which will enhance the public realm. These enhancements are a

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https://www.luton.gov.uk/Council_government_and_democracy/Councils/Capital%20and%20Asset%20Management/Pages/Town%20Centre%20Management%20-%20CCTV.aspx

¹⁷ App ref: 07/01897/out



precursor to planned improvements, and secured investment funds, for an upgrade to the railway station.

- 3.3.42 The area's proximity to the town centre's premier retail frontage provides an excellent opportunity for regeneration proposals to be delivered at a highly accessible location which in turn should deliver a step change in the environmental quality of this area.

Summary of Town Centre vitality and viability

- 3.3.43 Based on an updated comparative analysis of the 2012 Refresh health check findings and more recent 2015 audit, overall, there has been a modest but positive change in the retail environment of Luton town centre since 2012. In the north of the town centre there has been recent pedestrianisation and environmental improvements on Guildford Street and improved Bute street environment and connectivity to the railway station (which is planned to be upgraded) . There has also been recent refurbishment of the George Street paving fronting the Mall.
- 3.3.44 The centre continues to maintain a healthy mix and representation of units which, in the main, reflect the UK average, albeit the centre remains under represented in convenience terms. Unit vacancies are down, albeit not as a proportion of floorspace, but remain broadly comparable to the UK average. Vacancies are mostly concentrated in the Northern Gateway area which remains a key opportunity site for retail investment in step with the phasing of pedestrian, sustainable transport related and environmental improvements recently completed and further measures planned.
- 3.3.45 The centre is considered accessible, but remains prone to traffic congestion at peak periods although the inner ring road has now been completed and further improvements are being made including further phases planned to improve sustainable travel via access to the railway station interchange (e.g. with guided Bus and Sustainable Travel/Visitor Centre) and the Mall. The centre continues to offer a good selection of national multiples.
- 3.3.46 As concluded in the 2012 Refresh, whilst the town centre remains generally vital and viable, it must continue with its programme of planned investments and improvements in order to continue to function as a regional centre, and compete with the higher order centres. While there remains limited opportunity for additional multiples to locate within the centre a key priority for Luton Council is the delivery of identified opportunity sites which will extend the town centre in order to provide a step change in retail provision over the plan period which should secure the town centre as a competitive regional centre.



3.4 District and Neighbourhood Centres – Updated assessments

- 3.4.1 The 2012 Retail Study Refresh provided a review of Luton’s existing lower order centres to identify the most appropriate role for those centres in a consolidated local hierarchy of District, Neighbourhood and Local centres. Each review included a health check assessment supplemented by the Council’s own survey information.
- 3.4.2 WYG has carried out an update of each of these assessments and together with an updated Centres Summary these are provided at **Appendix 3**¹⁹. A summary of the recommended centre designations is provided below.
- 3.4.3 WYG do not consider the establishment of neighbourhood centres at Dallow Road Downs or Dunstable Road/Waller Avenue to be feasible. Rather these areas of the borough should provide the focus of search areas for consolidated neighbourhood centre provision in future years.

Table 1.7 Updated Centres Assessments – Recommended designations

Ref	Centres	Recommended Designation
1	Bury Park	District
2	Marsh Road	District
3	Purley (Marsh Farm)	District
15	Sundon Park	District
5	Stopsley	District
6	Wigmore	District
4	St Dominic’s Square	Neighbourhood
7	Biscot Road/ Blenheim Crescent	Neighbourhood
8	Calverton Road	Neighbourhood
9	Freeman Avenue	Neighbourhood
10	Bushmead (Hancock Drive)	Neighbourhood
11	High Town	Neighbourhood
12	Hockwell Ring	Neighbourhood
13	Market Square, Farley	Neighbourhood

¹⁹ In updating the assessments some minor discrepancies were identified in the 2012 data. As such the 2012 figures quoted for comparative purposes may not tally with figures provided in the 2012 Refresh.



14	Round Green	Neighbourhood
26	Birdfoot's Lane South	Neighbourhood





4.0 Population and Expenditure

4.1 Introduction

4.1.1 This section of the report provides an updated assessment of the current and projected population and expenditure (both convenience and comparison goods generated) within the defined Study Area.

4.2 Study Area Population

4.2.1 Detailed population and household projection outputs have been provided to WYG by Opinion Research Services who has been commissioned by Luton Council to undertake demographic analysis to inform the Council's evidence base into future housing needs over the plan period²⁰.

4.2.2 The projections supplied to WYG are derived from investigation underpinning the Strategic Housing Market Assessment Update and based on 10-year migration trends taking account of Objectively Assessed Need (OAN) across Luton and Central Bedfordshire. The projections have been robustly disaggregated across the Retail Study Area postcode sectors. The use of SHMA compliant projections ensures a consistency of approach across evidence base documents and addresses representations made in 2014 on the retail evidence of the Draft Luton Local Plan consultation.

4.2.3 Population figures are provided for each of the 9 survey zones. Population and expenditure has been calculated at five-year intervals in accordance with NPPF (i.e. 2015, 2020, 2025, and 2030), and then 2031 to reflect the future development plan timeframe.

4.2.4 Table 2.0 provides a detailed breakdown of the forecast population change within each survey zone in the period through to 2031.

²⁰ Strategic Housing Market Assessment Update 2015

**Table 2.0: Population by Survey Zone (2015 to 2031)**

Zone	2012 ²¹	2015	2020	2025	2030	2031
1A	60,435	62,809	66,182	69,322	71,893	72,371
1B	80,593	83,714	88,100	92,087	95,389	96,007
1C	75,916	78,857	82,972	86,709	89,820	90,396
2	75,502	77,909	82,183	86,393	89,842	90,474
3	46,560	47,593	49,608	51,744	53,400	53,705
4	45,266	46,981	49,842	52,601	54,789	55,177
5	25,220	26,114	27,623	29,098	30,265	30,474
6	27,515	28,634	30,486	32,291	33,711	33,973
Total	437,007	452,610	476,995	500,245	519,108	522,577

Source: Table 1, Appendix 4

4.2.5 The Study Area has a resident population of approximately 452,610 in 2015, rising to 476,995 by 2020, to 500,245 by 2025, 519,108 by 2030 and 522,577 in 2031. This represents an increase in population within the Study Area of 15.4% between 2015 and 2031.

4.2.6 Zone 1 (1A-1C) broadly represents the Luton Borough Council administrative area. The population figures for Luton are set out in the table below.

Table 2.1: Zone 1 Population (2015 to 2031)

Zone	2012 ²²	2015	2020	2025	2030	2031
1A	60,435	62,809	66,182	69,322	71,893	72,371
1B	80,593	83,714	88,100	92,087	95,389	96,007
1C	75,916	78,857	82,972	86,709	89,820	90,396
Total	216,944	225,380	237,253	248,118	257,102	258,773

Source: Table 1, Appendix 4

4.3 Retail Expenditure

4.3.1 In order to calculate convenience and comparison expenditure per person, WYG has utilised Experian Micromarketer G3 data, which provides detailed information on local consumer expenditure that takes into account the socio-economic characteristics of the local population. Experian is a widely accepted source of expenditure and population data.

²¹ 2012 shown as base year of population projections

²² 2012 shown as base year of pop projections



4.3.2 The base year for the Experian expenditure data is 2012. Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 12.1, published in October 2014. For the purposes of this study, the following annual growth forecasts have been applied.

Table 2.2: Expenditure Growth Forecasts (%)

Year	Convenience	Comparison
2014	-0.5	5.6
2015	0.5	4.4
2016	0.4	3.1
2015 to 25	0.6 per annum	3.3 per annum
2017 to 21	0.6 per annum	3.1 per annum
2022 to 35	0.6 per annum	3.3 per annum

Source: Retail Planner Briefing Note 12.1 (October 2014)

4.3.3 The latest growth forecasts suggest an improved outlook to previous forecasts. Over the medium to long term levels of growth are anticipated to increase as the economy recovers to pre-recession levels. Expenditure estimates have been produced for each survey zone in 2015, 2020, 2025, 2030 and 2031 to cover the plan period. The assessment takes into account both retail expenditure growth and population change.

4.3.4 Deductions have been made for special forms of trading in line with projections published by Experian MMG3 (Appendix 3, Retail Planner 12.1). The projections take account of the strong increase in online shopping over the past decade, including sales via the internet, mail order, stalls and markets, door-to-door and telephone sales. Online sales by supermarkets, department stores and catalogue companies are included. Experian utilise this data derived from ONS to calculate the annual market share of non-store retailing as a proportion of all retail sales, both convenience and comparison.

4.3.5 The assessment set out below adopts these projections. It also allows for the forecast annual growth in non-store²³ retail market share, representing a robust approach.

Convenience Goods Expenditure

4.3.6 It is estimated that, in 2015, the resident population of the Study Area generates some £833.3m of convenience goods expenditure. This is forecast to increase to £1036.2m by 2031, which represents an increase of £202.9m (or 24.4%) between 2015 and 2031.

²³ Sales of goods and services outside the confines of a store including internet, mail order etc.



4.3.7 For Luton, the estimated total available convenience goods expenditure in Zones 1A-1C at 2015 is £368.4m, which is forecast to increase to £455.4m at 2031 (24%).

Main Food and 'Top-Up' Shopping

4.3.8 For the purposes of this study, the proportion of convenience goods expenditure directed to respondents' main food shopping destination has been derived directly from the household survey results (Questions 7 and 10). The results provide a proportional split in the resident spend of convenience expenditure for main (bulk food) and top-up (day to day bread and milk purchases and so on) food shopping. By applying these expenditure estimates to the identified resident population of the Study Area, the following split of available convenience expenditure has been calculated:

- £632.1m main food expenditure at 2015 (81%).
- £145.6m top-up expenditure at 2015 (19%).

4.3.9 For Luton, the proportional expenditure split gives a total available main food shopping expenditure of £218m (81%) and available top-up food shopping expenditure of £49m (19%).

Comparison Goods Expenditure

Table 2.3: Total Available Expenditure – Comparison (£m)

2015	2020	2025	2030	2031	Growth 2015-31
1170.7	1382.3	1699.1	2080.3	2167.5	996.8

Source: Table 3b, Appendix 4

4.3.10 In 2015, the resident population within the Study Area is identified as generating £1,170.7m of comparison goods expenditure. Given the forecast growth in population and expenditure, this is expected to increase to £2,167.5m by 2031. This represents an increase of £996.8m (or 85%) between 2015 and 2031. This is clearly a significant increase and is a result of the forecast increase in catchment population and, in particular, the forecast level of comparison goods expenditure growth over forthcoming years.

4.3.11 For Luton, the total available comparison goods expenditure is £476.7m at 2015, rising to £877.2m at 2031 (84%).

4.3.12 Comparison goods expenditure has been divided into seven sub-categories in line with the Experian MMG3 data source: 'Furniture and Flooring', 'DIY and decorating', 'Electrical', 'Domestic Appliances'



(i.e. Bulky Goods), 'Clothing & Footwear', 'Small Household Goods', 'Recreational' and 'Personal and Luxury' (Non-Bulky Goods). The proportion of expenditure directed to each category is derived by applying a proportional split provided in the raw Experian data for the Study Area to the total available comparison good expenditure.

4.3.13 Tables 3c-3g at Appendix 4 set out the total available comparison goods expenditure per category at the 5 year intervals on which this assessment is based, both for the Study Area as a whole and the Luton administrative area. In summary, the 2015 proportion of expenditure directed to each comparison sub-category is as follows:

Bulky goods:

- Furniture and floor coverings – 11.7%.
- DIY & Decorating – 6.1%.
- Domestic Appliances and TV & Radio – 16.1%.
- **Sub-total – 33.9%.**

Non-bulky goods:

- Clothing and footwear – 26.5%.
- Recreation – 17.9%.
- Personal and luxury – 21.4%.
- **Sub-total – 65.8%.**

Forecast Growth in Expenditure Attracted to the Study Area

4.3.14 The expenditure forecasts set out above indicate that total available convenience and comparison expenditure in the Study Area is expected to increase significantly over the period 2015-2031. The same is true for Luton alone (i.e. Zone 1). The growth in convenience expenditure is forecast to be 24% (£202.9m) over the period to 2031. Owing to more substantial comparison expenditure growth rates published by Experian, the forecast increase in the comparison sector is forecast to be 85.0% (£996.82m).

4.3.15 Assuming a constant market share, convenience retail facilities in Luton will capture 38% (£77m) of the total growth in available expenditure. For comparison goods, retailers in Luton will capture 36% (£359m) of the total growth. It is evident that new development would be required to absorb such



growth and avoid Luton losing market share; both from Zone 1 and the Study Area as a whole. Indeed, the Council should aim to improve convenience and comparison market share to ensure Luton maintains its status as a Regional centre in the sub-regional hierarchy, particularly in the context of increased competition from competing centres.

- 4.3.16 There is considered to remain room for improving the market share of Luton, particularly with respect to comparison goods provision. As identified in the 2012 Refresh carefully considered and appropriately located new development would add to the overall offer and attraction of the town centre, and should lead to uplift in market share.
- 4.3.17 An updated assessment of quantitative need for additional retail floorspace explores these matters further and is set out in the subsequent section of the report.



5.0 Retail Capacity

5.1 Introduction

5.1.1 This section of the Study considers afresh the quantitative capacity for new retail floorspace in Luton over the period 2015-2031. Indicative capacity assessments are provided for 2020, 2025, 2030 (and 2031) to cover the plan period, which is consistent with the five year forecast periods advocated in the NPPF. This section effectively supercedes Section 8.0 of the 2012 Refresh.

5.1.2 As before the capacity assessment adopts a widely acknowledged step by step methodology, in line with best practice. The key steps include identifying:

- Available Expenditure in 2015-31 (as set out in Section 4.0) – calculated based on:
 - i. Forecast population growth.
 - ii. Growth in expenditure per capita.
 - iii. Allowance for special forms of trading.
- Turnover – identification of the Study Area derived turnover of existing retail facilities in Luton based on market share.
- Benchmark turnover – calculation of benchmark company average turnover of existing retail facilities using Mintel Retail Rankings and Verdict UK Grocery Retailers reports to assess levels of 'over' or 'under' trading (convenience sector only).
- Surplus expenditure – identification of expenditure surplus or deficit as the difference between available expenditure and the turnover of existing facilities, both on a baseline (as existing) and (for convenience sector only) benchmark (taking account of over and under trading) basis.
- Assessment – calculation of the likely turnover of known retail commitments based on data received from the Council.
- Surplus expenditure capacity – the difference between surplus expenditure and the turnover of known commitments.
- Floorspace requirements – consideration of the level of floorspace required to meet the surplus expenditure capacity based on likely sales densities of different types of retail floorspace.

5.1.3 Statistical tables providing full details of inputs and the step-by-step application of the methodology set out below are provided at **Appendix 4**.



5.2 Household Survey

5.2.1 Since the production of the 2012 Refresh there has not been any notable on-the-ground retail development which may render the empirical household survey carried out in 2012 as out of date. Accordingly, this Update utilises the 2012 household (h/h) survey which underpinned the 2012 Refresh. The Update is based on the h/h survey quantitative model of shopping patterns established in 2012, incorporating new population, expenditure and sales density data in order to consider afresh potential expenditure capacity.

5.3 Committed Development

5.3.1 Identified commitments have been accounted for and are set out in the statistical tables at Appendix 5. In addition to accounting for Luton Borough's committed retail development, WYG has worked with Luton Council to understand known development commitments in neighbouring local planning authorities. This is in order to identify notable pipeline schemes within competing centres which will have the effect of consolidating their retail offer and/or enhancing their market share.

5.3.2 Since the 2012 Refresh retail developments approved in **Luton** include:

PP ref: 14/00849/FUL - Planning permission was granted in December 2014 for the development of a foodstore with associated car parking and landscaping at Scott Road, Sundon Park.

PP ref: 13/00280/OUT - Outline planning permission was granted in April 2015 for a mixed use development at the former Vauxhall Motors site (Napier Park) for residential, retail, office, storage and distribution, hotel and casino uses and other associated works.

PP ref: 13/00782 – Planning permission was granted in June 2014 for the demolition and erection of 1,502sqm of retail floorspace with residential development.

5.3.3 The following retail development has been highlighted in **Central Bedfordshire Council**:

PP ref: CB/12/0361/OUT - North Houghton Regis Urban Extension (HRN1): Planning permission was granted in June 2014 for development comprising: up to 5,150 dwellings (Use Class C3); up to 202,500sqm gross of additional development in Use Classes: A1, A2, A3 (retail), A4 (public house), A5 (take away); B1, B2, B8 (offices, industrial and storage and distribution); C1 (hotel), C2 (care home), D1 and D2 (community and leisure); car showroom; data centre; petrol filling station; car parking; primary substation; energy centre and other associated development.



5.3.4 The development lies within but on the outskirts of the Study Area. Precise details of the commercial elements of the proposals and timeframe for delivery are not known. However, WYG note the commercial elements of the scheme were assessed in the application submission as being delivered by 2022 - no earlier assessment of the commercial floorspace is provided. WYG has adopted a delivery year of 2022 for the purposes of accounting for this development as part of the following assessment of capacity in future years.

5.3.5 **North Hertfordshire Council** and **St Albans City & District Council** were contacted to confirm that there are presently no significant retail developments in the pipeline.

5.4 Capacity Formula

5.4.1 For all types of capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) (allowing for population change and retail growth) *less* Turnover (£m) *equals* Surplus or Deficit (£m).

5.4.2 **Expenditure (£m)** – The expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The expenditure is estimated with reference to a number of factors, namely:

- Growth in population;
- Growth in expenditure per person per annum; and
- Special Forms of Trading (e.g. catalogue shopping / internet).

5.4.3 **Turnover (£m)** – The turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Mintel Retail Rankings and Verdict UK Grocery Retailers reports – independent analysis which lists the sales density for all major multiple retailers.

5.4.4 **Surplus / Deficit (£m)** – This represents the difference between the expenditure and turnover figures outlined above. Clearly, a surplus figure will represent an under provision of retail facilities within the Study Area (which, all things being equal, would suggest that additional floorspace is required), whereas a deficit would suggest a quantitative over-provision of retail facilities.

5.4.5 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required. The level of floorspace



will vary dependent on the type of retailer proposed and the type of goods traded. For example, in the case of comparison goods, electrical retailers such as Currys (which is considered a bulky goods retailer) have a much higher sales density than other bulky goods retailers, such as B&Q.

- 5.4.6 WYG recommend caution is applied in relying on the longer-term projections of any capacity assessment owing to the volatility of much of the data and assumptions used. Indeed, an updated capacity assessment of need should ideally be carried out around every 5 years. Accordingly, it is not necessarily appropriate to plan to meet all needs identified now. WYG recommend assessed capacity is kept subject to review.

5.5 Benchmark Convenience Capacity

- 5.5.1 In order to ascertain the likely need for additional convenience goods floorspace, it is necessary to consider the performance of the current provision. It is possible to calculate the convenience capacity likely to be available to support new retail floorspace over the periods to 2020, 2025, 2030 and 2031, based on an assessment of the 'benchmark' turnover of existing floorspace i.e. the level of turnover that a store is generally expected to attract, based on company average trading levels.
- 5.5.2 The table below sets out the current convenience goods trading position compared against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace and projects this forward to 2031.
- 5.5.3 The 'benchmark' turnover differs for each operator based on its average turnover per square metre throughout the country. Although robust up-to-date information is available in terms of the convenience goods floorspace provided by large foodstores, it can be more difficult to quantify the extent of local convenience provision as there is no single comprehensive database to rely upon. Where we have been unable to verify the exact quantum of floorspace provided by existing smaller-scale convenience stores, we have assumed that stores are trading 'at equilibrium' (i.e. the survey-derived turnover equates to the expected level of turnover).
- 5.5.4 Our assessment is based upon a 'goods based' approach, which disaggregates expenditure by category type, and it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, compact discs, clothing and household goods. To account for this, the typical ratio between convenience/comparison goods provision for each



operator²⁴ has been applied to the estimated net floorspace of each foodstore²⁵. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.

- 5.5.5 Whilst survey results are commonly accepted as a means by which to identify existing shopping patterns, their findings should be treated with a 'note of caution' as they tend to have a bias towards larger stores and can understate the role of smaller stores and independent retailers.
- 5.5.6 The individual performance of each of the main convenience goods facilities is identified at Table 15 of **Appendix 4**.
- 5.5.7 Our assessment identifies that taking all convenience goods retail facilities the actual identified survey-derived turnover of £313.5m is significantly higher than the benchmarked turnover of £246.2m per annum at 2015. This suggests that, taken cumulatively, existing convenience goods retailers are significantly 'overtrading' when compared to expected turnover. An approximate £67.4m over-trade is identified, which suggests that existing provision is stretched in meeting the existing quantitative need.
- 5.5.8 In order to appraise the need for additional convenience goods retail floorspace, it is necessary to consider how the performance of stores will be affected by future growth in expenditure. Accordingly, the tables below set out the anticipated increases in expenditure available to existing retail facilities. It is also assumed that the turnover of existing floorspace will improve through improvements in floorspace efficiency as set out in Experian Retail Planner Briefing Note Addendum 12.1. Following this exercise, we then consider the effect extant planning commitments will have in addressing any identified convenience goods shopping need.
- 5.5.9 WYG consider there remains potential for Luton to increase its market share of convenience expenditure within the Study Area in future years. This is based on a combination of factors that are likely to improve the attractiveness and competitiveness of Luton town centre as a convenience shopping destination. Principally, through the delivery of additional development at the two large allocated opportunity sites, namely Power Court. Delivery of Power Court in particular to accommodate *inter alia* a large foodstore these sites is likely to result in a step change in the quality of the town's retail offer and viability as a convenience retail destination.

²⁴ Derived from Verdict UK Food & Grocery 2014 Company Briefing Reports. Where Verdict data is not available or is considered not to appropriately reflect how a store trades in practice, we have applied professional judgement.

²⁵ Net sales areas have been sourced from Institute of Grocery Distribution data where available. Where such data is not available, we have applied professional judgement.



Table 3.0: Benchmark Capacity for Convenience Goods Floorspace (Increased Market Share)

	2015	2020	2025	2030	2031
[1] Available Convenience Goods Expenditure (£m)	313.5	335.1	393.5	419.5	424.9
[2] Market Share in 2015 (%)	38	38	41	41	41
[3] Turnover of Existing (£m)	246.2	243.2	243.7	244.9	245.2
[4] Residual Expenditure (£m)	67.4	91.8	149.8	174.6	179.7
[5] Commitments (£m)	37.3	36.8	98.6	99.1	99.2
[6] Residual Expenditure (£m)	30.1	55.0	51.2	75.5	80.5
[7] Assumed Sales Density of New Floorspace (£/sq m) (A)	12,527	12,377	12,402	12,464	12,477
[7] Assumed Sales Density of New Floorspace (£/sq m) (B)	8,869	8,763	8,887	8,913	8,878
[8] Floorspace Capacity (sq m) (A)	2,402	4,446	4,125	6,055	6,450
[8] Floorspace Capacity (sq m) (B)	3,393	6,279	5,757	8,467	9,064

Source: Table 17, Appendix 4

- 5.5.10 The table above indicates that through increases in both population and expenditure applied to the benchmark turnover of existing facilities (allowing for increased turnover efficiency) and accounting for committed convenience retail floorspace, £30.1m of residual (surplus) expenditure is identified at 2015, rising to £55.0m at 2020, £51.2m at 2025, £75.5m at 2030 and £80.5m at 2031.
- 5.5.11 The above table applies a range of average convenience sales densities to the identified residual expenditure. It identifies retail capacity to accommodate: between 2,402sqm net and 3,393sqm net of additional convenience retail floorspace in 2015, rising to between 4,446sqm net in 2020 and 6,279sqm net in 2020, between 4,125sqm net and 5,757sqm net in 2025, 6,055sqm net and 8,467sqm net in 2030 between 6,450sqm net and 9,064sqm net in 2031.

5.6 Baseline Comparison Capacity

- 5.6.1 Turning to comparison goods capacity, it is first important to note that the methodology deviates from that which has been deployed in respect of convenience goods. With comparison goods we adopt an approach whereby existing provision is assumed to be trading 'at equilibrium' at 2015 (i.e. our survey derived turnover estimate effectively acts as benchmark). There are two principal reasons for this. Firstly, it can be extremely difficult to attribute an appropriate benchmark turnover to existing comparison goods provision. Secondly, there tends to be greater disparity between the



trading performance of apparently similar comparison goods provision depending on its location, the character of the area and the nature of the catchment. Therefore, for comparison goods the equilibrium provides a 'baseline' on which to assess capacity.

5.6.2 Firstly we provide an assessment of comparison capacity based on a constant market share scenario. The outcome of the assessment is set out below.

Table 3.1: Estimated Baseline Capacity for Comparison Goods (Constant Market Share)

Year	Available Expenditure £m ²	Turnover £m ¹	Commitments £m	Surplus Expenditure £m
2015	425.5	425.5	14.6	-14.6
2020	502.0	471.1	16.2	14.7
2025	615.9	524.3	95.1	-3.5
2030	753.2	584.5	106.0	62.7
2031	784.7	597.4	108.4	79.0

¹ Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 12.1 (Oct 2014)

² Assumes constant market share (36%) claimed by facilities within Luton Borough (2012 Prices)

5.6.3 The baseline surplus expenditure capacity to support new comparison retail floorspace at 2020 is £14.7m. This is anticipated to decrease to -£3.5m at 2025 (as a result of the anticipated delivery of known commitments), following which it will increase to £62.7m at 2030, and £79.0m by 2031.

5.6.4 This scenario (set out at Tables 18 at **Appendix 5**) 'rolls forward' a constant market share to examine the likely level of comparison goods floorspace required to maintain the role and function of Luton's retail facilities. The scenario assumes that the future performance of retail facilities will be commensurate with the current market share.

5.6.5 Based on the above analysis the table below examines the likely comparison goods floorspace required for this market share to be maintained.

**Table 3.2: Baseline Capacity for Comparison Goods Floorspace (Constant Market Share)**

	2015	2020	2025	2030	2031
[1] Available Comparison Goods Expenditure (£m)	425.5	502.0	615.9	753.2	784.7
[2] Market Share in 2015 (%)	36	36	36	36	36
[3] Turnover of Existing (£m)	425.5	471.1	524.3	584.5	597.4
[4] Residual Expenditure (£m)	0.0	30.9	91.6	168.7	187.3
[5] Commitments (£m)	14.6	16.2	95.1	106.0	108.4
[6] Residual Expenditure (£m)	-14.6	14.7	-3.5	62.7	79.0
[7] Assumed Sales Density of New Floorspace (£/sq m) (A)	5,000	5,537	6,161	6,869	7,020
[7] Assumed Sales Density of New Floorspace (£/sq m) (B)	3,000	3,322	3,697	4,122	4,212
[8] Floorspace Capacity (sq m) (A)		2,652	-566	9,123	11,246
[8] Floorspace Capacity (sq m) (B)		4,420	-944	15,205	18,744

Source: Table 18, Appendix 4

5.6.6 The table above shows capacity based on the application of a range of sales densities (i.e. 3,000£/sqm (Max) and 5,000£/sqm (Min)) to reflect the differing trading characteristics of comparison operators. It is estimated that up to 18,744sqm net could theoretically be supported to 2031.

Increased Market Share scenario

5.6.7 Paragraph 23 of the NPPF requires local planning authorities to promote competitive town centres by, *inter alia*, promoting competitive town centres that provide customer choice and a diverse retail offer; and allocate a range of sites to meet identified needs.

5.6.8 As was the case in 2012 WYG consider there remains significant potential for Luton to markedly increase its competitiveness and improve consumer choice and diversity in respect of the comparison goods sector. Indeed, it is important for Luton, in the face of increasing competition, to actively plan for a marked improvement in the town centre's competitiveness and strive to increase what is considered a relatively low market share for comparison goods, having regard to Luton's status in the sub-region.

5.6.9 There is considered to be good scope to do achieve this based on a combination of factors that are likely to improve the attractiveness and competitiveness of Luton town centre as a shopping



destination. Primarily, the delivery of the two allocated opportunity sites at the Northern Gateway and Power Court. The delivery of these sites for retail led redevelopment is likely to result in a step change in the quality of the town's comparison retail offer.

5.6.10 As such WYG has carried out an increased market share scenario to reflect the enhancement of Luton's retail offer in relation to competing locations. The below table examines an alternative scenario based on an improved market share at 2025 and beyond. WYG considers an 'uplift' in market share is realistic and achievable, following the anticipated delivery of Luton's opportunity sites.

Table 3.3: Capacity for Comparison Goods Floorspace (Increased Market Share)

	2015	2020	2025	2030	2031
[1] Available Comparison Goods Expenditure (£m)	425.5	502.0	730.6	894.5	932.0
[2] Market Share in 2015 (%)	36	36	43	43	43
[3] Turnover of Existing (£m)	425.5	471.1	524.3	584.5	597.4
[4] Residual Expenditure (£m)	0.0	30.9	206.4	310.0	334.6
[5] Commitments (£m)	14.6	16.2	95.1	106.0	108.4
[6] Residual Expenditure (£m)	-14.6	14.7	111.3	203.9	226.3
[7] Assumed Sales Density of New Floorspace (£/sq m) (A)	5,000	5,537	6,161	6,869	7,020
[7] Assumed Sales Density of New Floorspace (£/sq m) (B)	3,000	3,322	3,697	4,122	4,212
[8] Floorspace Capacity (sq m) (A)		2,652	18,057	29,690	32,229
[8] Floorspace Capacity (sq m) (B)		4,420	30,096	49,483	53,715

Source: Table 19, Appendix 4

5.6.11 The table above shows capacity based on the application of a range of sales densities (i.e.

3,000£/sqm (A) and 5,000£/sqm (B)) to reflect the differing trading characteristics of comparison operators.

5.6.12 Based on the analysis set out above it is estimated that between 2,652sqm net to 4,420sqm net of additional comparison floorspace could be supported in 2020, rising to between 18,057sqm net to 30,096sqm net in 2025; between 26,690sqm net and 49,483sqm net in 2033 and between 32,229sqm net and 53,715sqm net in 2031.

5.6.13 The assessment reflects a current state of 'equilibrium' in that it assumes the turnover of comparison shopping facilities in Luton is equal to the expenditure generated. However, WYG



consider many of the key national multiples in Luton may well be overtrading. There has been limited growth in town centre comparison goods floorspace in recent years and WYG consider there is likely to be a continuing imbalance between the supply of comparison goods floorspace and the expenditure available in Luton's catchment area (a trend noted in previous studies in 2005, 2009 and 2012). As such WYG recommend the Council plan for the delivery of a significant quantum of comparison floorspace in order to increase Luton's market share and ensure its status in the sub-region is maintained, in the face of significant committed floorspace in the pipeline beyond Luton (within the wider Study Area) and increasing competition from nearby centres.

5.7 Conclusion

- 5.7.1 Based on current shopping patterns, there is demonstrable capacity for further convenience retail floorspace within Luton. As highlighted in 2012, stores such as Tesco Express at the Mall and Asda at Wigmore are trading significantly above company averages which suggest capacity for greater competition and choice. Based on forecast increases in expenditure and current 'overtrading', and accounting for commitments, there is assessed to be an immediate convenience goods expenditure capacity of £67.4m. This is forecast to increase to £91.8m by 2020, to £149.8m by 2025, and to £174.6m by 2030 and £179.7m by 2031.
- 5.7.2 Based on an application of a range of sales densities to the identified residual expenditure to reflect the differing trading characteristics of convenience operators highlights immediate capacity (2015) to accommodate between 2,402sq m net and 3,393sqm net of new convenience goods floorspace, rising to between 4,446sqmnet and 6,279sqm net by 2025, between 4,125sqm net and 5,757sqm net by 2030 and 6,450sqm net and 9,064sqm net by 2031.
- 5.7.3 Given the forecast increases in comparison goods expenditure and population assuming that the future performance of Luton's facilities will match its current market share — the surplus expenditure capacity from Luton Borough's survey derived turnover is identified as £14.7m by 2020. This is forecast to decrease to -£3.5 in 2025 (accounting for the delivery of commitments), and subsequently increase £62.7m in 2030 and £79.0m in 2031.
- 5.7.4 Taking separate sales densities to account for difference in comparison operators identifies a constant market share capacity of between 2,652sqm net and 4,420sqm net of additional comparison retail floorspace in 2020, increasing to between 11,246sqm net and 18,744sqm by 2031.
- 5.7.5 An increased market share 'uplift' scenario in future years identifies capacity of £206.4m by 2025, increasing to £310.0m by 2030 and £334.6m by 2031. This would result in capacity for between



2,642sqm net and 4,420sqm net of additional comparison retail floorspace to be delivered by 2020, increasing to between 18,057sqm net and 30,096sqm net by 2025, 29,690sqm net and 49,483sqm net by 2030 and between 32,229sqm net and 53,715sqm net by 2031.

5.7.6 WYG recommend caution is applied in relying on the longer-term projections. An updated assessment of need should ideally be carried out around every 5 years. Accordingly, it is not necessarily appropriate to plan to meet all needs identified now. Assessed capacity should be kept subject to review.



6.0 Recommendations for Town Centre Enhancement

6.1 Introduction

- 6.1.1 The preceding sections provide an update of detailed research into the vitality and viability of Luton based centres and the anticipated future demand for additional retail provision in Luton Borough over the forthcoming plan period.
- 6.1.2 The following section provides strategic recommendations towards creating a 'vision' for town centre enhancement. Taking account of the findings of the updated quantitative assessment set out in the preceding sections WYG suggest strategies and identify development opportunities in order to deliver an enhancement of the town centre through sustainable economic development.

6.2 Policy Context

- 6.2.1 As set out in the sections, paragraph 23 of the NPPF requires local planning authorities to promote competitive town centres by, *inter alia*, recognising town centres as the heart of their communities and by pursuing policies to support their vitality and viability. The NPPG states any strategy should be based on evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality.
- 6.2.2 The emerging Luton Local Plan outlines the key strategic objectives with respect to Luton's town and district centres:

Strategic Objective 4: To establish an effective network and hierarchy of town, district and neighbourhood centres to serve as the heart of local communities and improve health through improved access by train, bus, walking and cycling to a mix of uses including shopping, services and jobs.

Strategic Objective 6: Reduce social, economic and environmental deprivation, particularly where it is spatially concentrated, by taking priority measures to reduce unemployment, improve skills and education and renew housing, community and environmental conditions.

Strategic Objective 8: Improve accessibility, connectivity, sustainability and ease of movement to, from and within the borough.



6.3 Economic Context

- 6.3.1 Paragraph 18 of the NPPF states LPAs should proactively plan to meet the needs of business and support existing business sectors and prepare plans that are 'aspirational but realistic' (paragraph 153). To this end, it is important to consider the wider economic context. Economic changes in the retail sector and more widely have in recent years led to a changing role of the town centre. These changes have meant that the town centre's historic function of, above all, providing a primary retail destination is, perhaps, not as defined as it once was. It is important to consider this backdrop in providing appropriate recommendations.
- 6.3.2 Firstly, it is broadly accepted that, nationally, there has been a polarisation of centres, whereby popular national retailers synonymous with town centres nationwide have retreated from smaller towns/settlements, preferring instead to concentrate their activities in larger centres. Greater efficiencies can be achieved by retaining a smaller strategic network of large stores (offering a full range of products). Furthermore, the economic downturn and growth in online shopping have further lessened demand for physical stores, and increasingly discerning and cost conscious customers are now more prepared to travel further afield. The upshot of these trends is an increasing concentration of comparison goods expenditure in a smaller number of larger centres.
- 6.3.3 This drop off in demand for retail floorspace has led to many commercial development proposals in the pipeline being subject to review with emerging proposals seeking broader A1 to A5 consents in order to build in an adaptability to accommodate a wider spectrum of uses and floorplate flexibility, so they can be split if demand dictates²⁶. Retailers needing fewer stores leave medium sized centres such as Luton town centre particularly susceptible to reduced retail demand.
- 6.3.4 The convenience goods sector which traditionally has been dominated by the 'big four' supermarket operators (Tesco, Asda, Sainsbury's and Morrisons), has more recently experienced a proliferation; that is, high quality operators (Waitrose, Marks & Spencer) and deep discount retailers (Aldi and Lidl) are increasingly growing market share - at the expense of the big four. Both Aldi and Lidl have benefitted from the economic downturn attracting increasingly cost conscious shoppers in ever greater numbers. Both operators have achieved exceptional growth in recent years. However, owing to the particular requirements of the deep discount format, these operators lack flexibility in terms of size, format and car-parking meaning if suitable sites cannot be found the operators look elsewhere.

²⁶ <http://www.planningresource.co.uk/article/1351614/shifting-centre-councils-changing-approach-retail-planning>



- 6.3.5 This trend is anticipated to continue and with the retrenchment of comparison operators many smaller-format convenience retailers have capitalised on the increase in available town centre floorspace. Indeed, the occupation of vacant units by food operators has helped fuel the move away from the larger-format stores towards top-up supermarkets. The aggressive big-four 'space race' over the last decade coupled with the proliferation of operators means foodstores are ever more accessible to shoppers who can now easily shop little and often. With consumer confidence still fragile shoppers remain as cost conscious as ever. It has been suggested this is feeding the trend towards top-up shopping. Time-poor consumers are paradoxically shopping more often but buying less per trip – fewer people want to endure the trauma of a Saturday morning "big shop" at the local Tesco²⁷.
- 6.3.6 The growth of online shopping is widely documented. This is also anticipated to continue unabated, certainly in the medium term. Online shopping is perceived to offer a number of advantages to high street retailing including lower prices, a greater variety of choice, and convenience, particularly for those less physically able who now have a greater number of platforms on which to shop (phones, tablets etc).
- 6.3.7 Longer term Experian anticipate the growth in online shopping will begin to plateau. Indeed, Experian suggest there remains a role for the traditional high street. At the very least the high street increases the visibility of businesses and provides a 'showroom' for online retailers. It should be noted 12 out of the top 20 e-commerce businesses in the UK have a physical presence on the high street²⁸. 'Click & Collect' is still a relatively new method of shopping but is being increasingly adopted – it is anticipated to drive high street footfall in coming years. The click and collect service lends itself to smaller format stores (in smaller centres) where the stocking of a full range of products may not be feasible.
- 6.3.8 With the various changes in the retail sector, it is now widely expected that leisure uses will play an increasingly important role in maintaining the vitality and viability of centres and constitute a growing share of town centre floorspace. The reduction in demand for retail floorspace coupled with post-recession increases in discretionary household leisure expenditure is predicted to lead to an increase in supply and demand for leisure activity in town centres.
- 6.3.9 As highlighted in the Luton Leisure Study 2015 (WYG) in terms of leisure expenditure, food and drink is by far the most popular leisure activity, with spending on restaurants and cafes (i.e. food

²⁷ <http://www.planningresource.co.uk/article/1351614/shifting-centre-councils-changing-approach-retail-planning>

²⁸ IMRG Experian Hitwise Hot Shops List, 2013



and drink) accounting for c.57% of total leisure spending in the Study Area, compared to around 16% on 'cultural services' (e.g. cinema, theatre, galleries etc.) and just 7% on recreation/sport. There is clear scope for Luton town centre to capitalise on this by seeking to diversify the town centre so that it increasingly becomes a leisure destination in its own right.

6.4 Town Centre Enhancement - Strategic Objectives

6.4.1 Paragraph 21 requires local authorities to set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth; and to identify strategic sites for local and inward investment in line with that strategy. In order to deliver town centre enhancement WYG recommend the Council seeks to deliver a vision which:

- Diversifies Luton town centre's offer in order to adapt to changing needs and compete more effectively with regional competitors;
- Delivers new opportunities to enhance the town centre's retail and leisure offer;
- Consider initiatives for better town centre management to attract visits and support economic activity; and
- Creates desirable urban spaces to enhance the visitor experience.

Diversification

6.4.2 For Luton town centre to succeed its role and function must be flexible and adaptable. WYG recommend the Council works together with key stakeholders to provide uses beyond traditional retail in order to ensure the centre remains vital and viable.

6.4.3 The development of a strong leisure offer to complement improved retail provision should prove to be symbiotic. That is, both will help to increase footfall (leisure uses particularly outside of retail hours in the evening economy), increase dwell time and generate linked trips.

6.4.4 The Council should look beyond retailing as a panacea to create a thriving town centre and look also to deliver other uses such as leisure. The Council should also encourage residential or employment development in the town centre, particularly on the upper floors above commercial units. Principally town centre initiatives should seek to increase *footfall* and *activity* through a wide variety of services and facilities. All will help to increase retail spend.



Non retail uses within primary shopping area

- 6.4.5 Policy LP22 of the emerging local plan indicates that proposals which would involve the loss of ground floor Class A1 shops within premier, primary and secondary frontages will generally be resisted unless specific criteria are met.
- 6.4.6 The Council should ensure the draft policy is not overly prescriptive with respect to the primary shopping area. As set out above some variation in use, even in the traditional retail core, may improve the overall attractiveness of the town centre and encourage visitors to stay for longer. It should be noted that most successful retail developments tend to cater a healthy proportion of non-retail uses in order to assist in providing a vital and viable destination.

Permitted development rights

- 6.4.7 The Town and Country Planning (General Permitted Development) (England) Order 2015 consolidates the 1995 Order's 43 parts down to 19 and amends the Use Classes Order²⁹. The recent amendments are intended to encourage growth in the economy through permitted development rights to make it easier for businesses to make the best use of their premises, support high streets and retailers.
- 6.4.8 In line with these ambitions, betting offices and pay day loan shops have been removed from Class A2 and are now *Sui Generis*, albeit they continue to benefit from permitted change of use to Class A1 and A2.
- 6.4.9 New permitted development rights specifically in regard to retailing uses include the:
- Permitted change of use of shops (Class A1) to financial and professional services (Class A2) such as banks, building societies, estate and employment agencies and professional services (Part 3, Class D); and
 - Up to 150sqm permitted change of use **from** shops (Class A1), financial and professional services (Class A2), betting offices, pay day loan shops and casinos **to** restaurants and cafes (Class A3); and for limited building works to allow for extraction/ ventilation units and waste storage/ management (Part 3, Class C);

²⁹ England only



- Up to 200sqm permitted change of use **from** shops (Class A1) and financial professional services (Class A2) **to** assembly and leisure uses (Class D2) subject to prior approval (Part 3, Class J). This also applies to premises that were in Class A1/A2 use on 5th December 2013, however does not apply to premises which have changed use to A1/A2 since that date.
- Allows retailers to a 'erect click and collect' facility (one is permitted per retail premises) limited to 4 metres in height and a gross floorspace of 20 sqm. Prior approval is required in respect of design, siting and external appearance of the new structure (Part 7, Class C);

6.4.10 The above changes are subject to a **prior approval** requiring, *inter alia*, an assessment to be made into the effect of the development on the sustainability of "key shopping centres" i.e. designated centres and the provision of services.

6.4.11 Luton Council should protect valued and successful retail provision in key shopping areas, while adopting flexibility to vacant/ underused units in more marginal areas.

6.4.12 The aspiration of the legislative change is to make it easier for businesses to provide a mix of leisure and entertainment uses on the high street and in town centres. It enables occupation of units by operations such as small scale gyms, dance centres and other indoor and outdoor recreational facilities. The changes should reduce the cost and time burdens of planning applications (with the exception of betting offices or pay day loan shop) and administrative costs and time taken processing planning applications by LPAs.

6.4.13 The widening of scope for permitted change of use should help Luton based businesses adapt more quickly to market changes. The prior approval enables Luton Council to ensure any potentially adverse impacts arising from permitted changes are properly regulated. In regard to the changes away from Class A1, the process allows the Council to consider:

1. whether the proposed development is beneficial to the town centre, accounting for negative impact on the adequate provision of the retail services being lost; and
2. the impact on the sustainability of facilities if the proposed use is located within a 'key shopping area'



- 6.4.14 The definition of 'key shopping area' is largely for Luton Council's determination. However WYG recommend discretion is applied where it is considered the loss of the premises could impact the sustainability of the area. Essentially, this creates the opportunity to impose an Article 4 direction withdrawing these new rights.
- 6.4.15 WYG believe the Council should see these rights as an *opportunity* rather than a threat and seek to utilise them to specifically target regeneration on particular streets/areas within the town centre. The prior approval process allows a safeguarding of key shopping areas based on the ability of the developer to disprove undesirable impacts.
- 6.4.16 WYG recommend retail remains the principal focus of the premier shopping area, however in order to: assist with the diversification of the town centre composition; add to the balance of uses; lessen the potential for less attractive units to be vacant for long periods of time; and help provide a modern shopping/leisure experience, beyond the premier shopping area the Council should deliver policy wording which provides sufficient flexibility for a range of appropriate retail and non-retail uses to co-exist.

Deliver additional floorspace

- 6.4.17 Luton Town Centre risks continuing to lose ground to competing regional centres without substantial improvement in the convenience and comparison shopping provision over the forthcoming plan period. The 2012 Refresh identified the delivery of both the Northern Gateway and Power Court opportunity sites as the strategic priority to accommodating additional retail floorspace.
- 6.4.18 The emerging Local Plan stipulates that identified floorspace need should be directed to Creative Quarter (Northern Gateway) within the Town Centre and to Power Court in line with the sequential approach. WYG consider the delivery of these sites remains the Council's strategic priority to delivering town centre enhancement.
- 6.4.19 We recommend for convenience goods retailing the Council continues to focus on the delivery of a new foodstore at Power Court to help claw back expenditure and decongest existing stores. Moreover we consider that a substantial quantum of comparison floorspace could be supported and be delivered in line with identified need. This provision is required to safeguard Luton's position in the sub-regional hierarchy in the face of increasing competition and pipeline development in the sub-region.



- 6.4.20 We have not identified any new site opportunities for significant retail redevelopment within the town centre, beyond infill developments. There remains little opportunity for significant town centre expansion, with the exception of the Northern Gateway. In light of our findings, we recommend that the Council continues its efforts to bring forward this important regeneration site. The development should encourage activity to the north of the centre and assist in meeting the identified quantitative capacity for additional retail floorspace.
- 6.4.21 Beyond the Northern Gateway, Power Court remains the long established sequentially preferable location to accommodate any residual large-scale retail and wider mixed uses development within Luton. Similarly we recommend that the Council continues its efforts to bring forward this important regeneration opportunity. Power Court has the potential to become an integral part of an extended town centre subject to the provision of necessary works to improve and facilitate pedestrian movement between the site and the established town centre including The Mall. A convenience retail redevelopment, alongside an element of comparison floorspace, is therefore considered to remain appropriate, having regard to the sequential approach.
- 6.4.22 It will be for the market to determine the form of the development that can be supported but comparison goods retail should form a primary element of any scheme(s). In the context of the above, consideration should also be given to delivering complimentary non-retail uses including food and drink and other Class C1 and D2 leisure uses (e.g. gyms/ cinemas etc). These will help secure multi-faceted development which will diversify the town centre economy as well as addressing deficits of provision identified in the Leisure Study 2015 and Hotel Study 2015.
- 6.4.23 Any future proposals should be assessed with appropriate consideration to its potential to have a prejudicial impact on the implementation of the Creative Quarter and Power Court. Proposals for main town uses in out of centre locations must demonstrate compliance with the sequential approach and provide a full assessment of impact of the proposal on the vitality and viability of protected centres in the Study Area.
- 6.4.24 WYG consider any out-of-centre development of a size and scale prejudicial to the delivery of the Northern Gateway and Power Court site and/or the enhancement of retail facilities within the borough's other key centres should be resisted, in accordance with policy set out at paragraphs 26 and 27 of the NPPF.
- 6.4.25 A plan showing the Northern Gateway and Power Court Opportunity sites is provided at **Appendix 5** for reference.



Thresholds

- 6.4.26 In accordance with national planning policy, it is appropriate to identify locally set thresholds for the scale of edge-of-centre and out-of-centre retail development which should be subject to the assessment of the impact criteria set out by paragraph 26 of the NPPF.
- 6.4.27 Taking account of the significant retail capacity in the Borough, we would caution against imposing too low a threshold that would result in an overly onerous requirement, whereby an applicant needs to invest significant time and resource to promote relatively straightforward and uncontentious proposals.
- 6.4.28 Notwithstanding this, the average gross floorspace of Luton's district centres is approximately 8,312sqm gross. The average gross floorspace of Luton's neighbourhood centres is approximately 1,354sqm gross. We consider that an appropriate locally set impact threshold policy would ensure that development proposals providing greater than 1,000sqm gross floorspace for main town centre uses in an edge or out of centre location should be the subject of an impact assessment. This threshold is likely to capture all notable small-medium sized standalone retail proposals, for example those proposed by discount operators. Such operators often generate significant turnovers and it is therefore considered appropriate to consider the trade diversion associated with such proposals, particularly where they are in proximity to smaller district and neighbourhood centres.
- 6.4.29 However, it should be noted that the scope of supplementary documentation accompanying an application addressing impact should be proportionate to the scale of development being proposed. Accordingly, it will be important during pre-application discussions to agree the content of any submission to address the test of retail impact. The setting of a threshold should allow the authority to retain appropriate control to ensure that particular scrutiny can be given to those application proposals which genuinely threaten to have an adverse impact on existing defined centres.

Town Centre Management

- 6.4.30 The management of the town centre is complex and involves a wide variety of departments/ stakeholders delivering a wide spectrum of functions e.g. cleansing, policing, events, property, business rates, planning policy and development management, traffic and highway management and parking management etc. There is limited scope to affect change through the planning system alone. It is clear the Council will need to ensure a cross-departmental approach in partnership with other key organisations to deliver tangible improvements to the town centre environment. WYG



consider it increasingly important that the planning department works alongside other Council departments and key stakeholders such as the Economic Development department, BID team and local businesses and landowners to ensure a coordinated approach. A joined-up approach provides the best opportunity of delivering town centre enhancement.

Parking

- 6.4.31 WYG recognise that car parking charges are for Luton Borough, like most Councils, an important source of revenue. Indeed, LBC parking revenues support the provision of highway maintenance within the budget for the Environment and Regeneration department. Notwithstanding this, WYG recommend the Council explore parking incentives so that, rather than discouraging visitors, provision is more commensurate to out-of-centre facilities which typically offer free, dedicated provision.
- 6.4.32 The Council could look to introduce reduced rates/free usage of public car parks at certain periods of day/times of week in order to encourage activity, particularly during quiet periods e.g. midweek evenings. WYG is aware of similar initiatives being utilised at centres elsewhere in the UK such as Newcastle³⁰.
- 6.4.33 WYG consider the use of upfront pay and display may have a tendency to reduce dwell times, and act as a disincentive to visiting the centre – they can lead to anxiety over parking fines which many perceive as punitive³¹. Pay on exit schemes could help remove time constraints placed on visitors, and facilitate the linking and prolonging of trips to the centre (i.e. shopping and evening leisure activity).

Environmental enhancements and improved public realm

- 6.4.34 Additional investment in the public realm, such as that delivered at St George's Square, should be sought to further enhance the town centre environment.
- 6.4.35 At Guildford Street there has been a recent pedestrianisation, and planned improvements to Bute Street to introduce a one-way system will also create a more pedestrian friendly environment. WYG understand a new Sustainable Travel/Visitor Centre is shortly due to open at this location which will also enhance the public realm. The enhancements are a precursor to planned improvements, and secured investment funds, for an upgrade to the railway station.

³⁰ <http://www.getintonewcastle.co.uk/alive-after-five/>

³¹ £50 or £70 for public car parks depending on the level of contravention



6.4.36 Environmental improvements should help better connect the various components of the town centre, improve dwell time and enhance the evening economy.

Community Infrastructure Levy

6.4.37 WYG understand a Community Infrastructure Levy (CIL) is not currently considered viable in Luton. However the Council intend to review this when development economics improve in the future.

6.4.38 WYG note CIL regulations allow Council's to have discretion to differentiate between the location and scale of floorspace. This could, in due course, be a used to incentivise landowners and developers to focus on delivery of development priorities. Luton Council could consider how any CIL may be administered across the Borough and to differing development. Exemptions within the town centre could be considered and, conversely, development that is out-of-centre charged at a specific rate.

Business rate relief

6.4.39 The (Coalition) Government's 2014 Autumn Statement³² provided business rates discount to help reduce the cost to existing businesses. The previous Government's extension of the small business rate relief scheme until April 2016 allows some of the smallest businesses to pay no rates at all with larger businesses benefitting from tapering relief. The Government also intend to increase a 'high street discount' for shops, pubs, cafes and restaurants with a rateable value of £50,000 or below to £1,500. Both measures intended to address concerns over the vulnerability of the high street as well as encouraging new enterprise.

6.4.40 WYG note Luton Council implement a business rate discount scheme. This could be reviewed to target certain businesses and areas of the centre in order to encourage local investment.

³² <https://www.gov.uk/government/news/autumn-statement-2014-16-things-you-should-know>



7.0 Conclusions

7.1.1 WYG was instructed by Luton Borough Council to carry out an update of the Retail Study Refresh carried out in 2012. Specifically WYG has carried out an updated quantitative assessment of retail capacity for additional convenience and comparison floorspace in the Borough, based on the most up to date population/ household projections and expenditure data. The Update is intended to advise on the need for new retail floorspace to meet the needs of a growing population as part of the evidence base informing the production of the emerging Local Plan (2011-2031).

7.1.2 In addition, WYG has carried out an updated assessment of the Borough's Town, District and Neighbourhood Centres and provide qualitative recommendations for town centre enhancement.

7.1.3 In summary, the Update identifies that:

- Luton town centre's ranking has improved since 2011, but remains lower than the most notable Major Regional Centres in the sub-region i.e. Milton Keynes and Watford. Shopping patterns in the Study Area are likely to continue to be strongly influenced by higher-order centres.
- There has been modest change in the retail environment of Luton town centre and further programmed improvements and investments are needed to secure the competitiveness of the town centre. The centre continues to maintain a healthy mix and representation of units which, in the main, reflect the UK average, albeit the centre remains under represented in convenience terms.
- While the proportion of vacancies remains slightly above the UK average there has been a reduction since 2012. Vacancies are mostly concentrated in secondary investment opportunity areas e.g. Northern Gateway Area. A fall in rental values in Luton has also been arrested in recent years, with modest growth experienced since 2012.
- The town centre will continue to struggle to compete with the higher order centres while there remains limited opportunity for additional multiples to locate to the town centre. This places significant importance and responsibility on a successful delivery of the key town centre allocations for this purpose – Northern Gateway and Power Court.
- An updated assessment of District, Neighbourhood and Local centres has been carried out based on additional site visits and up-to-date information. Recommended designations have been reviewed and healthchecks for each centre are provided as an Appendix to the Update. It is recommended Sundon Park is upgraded to District Centre;



- The Study Area has a resident population of approximately 452,610 in 2015, rising to 476,995 by 2020, to 500,245 by 2025, 519,108 by 2030 and 522,577 by 2031. This represents an increase in population within the Study Area of 15.4% between 2015 and 2031;
- It is estimated that, at 2015, the resident population of the Study Area generates some £833m of convenience goods expenditure. This is forecast to increase to £1.036bn by 2031;
- There is assessed to be an immediate convenience goods expenditure capacity within Luton of £30.1m, which is forecast to increase to £55.0m by 2020, to £51.2m by 2025, £75.5m to 2030 and by £80.5m by 2031. This identifies a capacity to accommodate between 4,446sqm net and 6,279sqm net of new convenience goods floorspace at 2020, and up to between 6,450sqm net and 9,064sqm net by 2031;
- It is estimated that, at 2015, the resident population of the Study Area generates some £1.170bn of comparison goods expenditure. This is forecast to increase to £2.167bn by 2031;
- The surplus expenditure capacity from the survey derived turnover under the constant market share scenario is identified as £14.7m by 2020, which is forecast to decrease to -£3.5m in 2025 (accounting for commitments), and subsequently increase to £62.7 in 2030 and £79.0m by 2031. This identifies a constant market share capacity for between 2,652sqm and 4,420sqm net of additional comparison retail floorspace in 2020, increasing to between 11,246sqm net and 18,744sqm net at 2031;
- Under the increased market share scenario, the surplus expenditure capacity from the survey derived turnover is forecast to increase to £111.3m in 2025, £203.9m in 2030 and £226.3m in 2031. This identifies a increased market share capacity for between 2,652sqm and 4,420sqm net of additional comparison retail floorspace in 2020, increasing to between 32,229sqm net and 53,715sqm net at 2031;
- WYG recommend that the Council continues its efforts to bring forward the development of the Northern Gateway site (Creative Quarter) opportunity site as a priority;
- Beyond the Northern Gateway Power Court site is considered to remain the sequentially preferable location to accommodate additional large-scale retail and leisure development within the Borough, subject to compliance with the sequential approach and a full assessment of impact of the proposal on the vitality and viability of protected centres in the Borough and in neighbouring authority areas;
- it is recommended the Council seek opportunities to: diversify Luton town centre's offer in order to adapt to changing retail/leisure needs and compete more effectively with regional



competitors; deliver opportunity sites in order to enhance the town centre's retail and leisure offer; consider initiatives for coordinated town centre management and create desirable urban spaces through public realm improvements that encourage a vibrant daytime and evening environment.

7.2 Additional Floorspace Provision

7.2.1 Over the plan period to 2031 WYG recommend that priorities for floorspace provision are:

- The provision of up to 6,279sqm net of convenience floorspace to be provided by 2020. A significant proportion of this should be provided at the Power Court site which is considered to be most suitable, available and viable sequentially preferable site;
- The provision of up to 30,096sqm net of comparison goods floorspace by 2025. The delivery should be met primarily at the Northern Gateway and Power Court sites;
- Remaining convenience and comparison floorspace capacity to be met in accordance with the key policy tests relating to the sequential approach to site selection and impact.

7.2.2 WYG recommend assessed capacity and floorspace requirements should be kept subject to review.

7.3 Thresholds

7.3.1 We consider that an appropriate locally set impact threshold policy would ensure proposals providing greater than 1,000sqm gross floorspace for main town centre uses in an edge or out of centre location should be the subject of an impact assessment.

7.3.2 The setting of a threshold should allow the authority to retain appropriate control over application proposals which may threaten to have an adverse impact on existing defined centres.



Glossary of Terms

Capacity Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities.

Comparison Goods Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods. A more detailed breakdown of comparison goods categories is provided below.

Furniture Goods Includes all consumer expenditure on furniture, floor coverings and household textiles such as beds, sofas, tables, cupboards, bed linen, curtains, towels, lamps, mirrors, and so on.

DIY Goods Includes all consumer expenditure on hardware, DIY, decorators' supplies and garden centre type goods. This category includes products such as hammers, saw, screwdrivers, wallpaper, plumbing items, floorboards, ceramic tiles, plants, pots, turf for lawns, and so on.

Electrical Goods All consumer retail expenditure on domestic electrical and gas appliances, such as washing machines, dryers, dishwashers, ironing and press machines, cookers, freezers and fridge-freezers, coffee makers, radios, televisions, DVD players, and so on.

Clothing & Footwear All consumer retail expenditure on shoes and other footwear, garments for men, women, children and infants either ready-to-wear or made-to-measure, underwear, ties, handkerchiefs, scarves, and so on.

Household Goods Includes household textiles and soft furnishings, china, glassware, jewellery and other miscellaneous goods such as greeting cards, notebooks, pens, pencils, and so on.

Recreational Goods All consumer retail expenditure on bicycles and tricycles (excluding toy bicycles), musical instruments, sports equipment, camping equipment, toys of all kinds including dolls, soft toys, and so on.



<i>Chemist Goods</i>	<i>All consumer retail expenditure on prescription and non-prescription drugs, adhesive and non-adhesive bandages, first-aid kits, hot-water bottles, toilet shops, sponges, and so on.</i>
Convenience Goods	Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines.
District Centre	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
Expenditure Per Capita	The average spend of each person within the defined Study Area on a variety of retail goods.
Expenditure	Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.
Expenditure Forecasts	This assessment has been undertaken using the 'goods based' approach as prescribed in the Planning for Town Centres Practice Guidance. Retail expenditure forecasts have been derived from Experian Retail Planner Briefing Note 12.1 (October 2014) and from Experian Retail Planner Briefing Note 12.1 Addendum (October 2014).
Experian (MMG3)	The database used to identify population, expenditure and socio-economic breakdown of the Study Area population.
Gross Floorspace	Represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, and so on).
GOAD Plans	Provide accurate information on the composition of town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Identifies the



fascia name, retail category, floorspace, and exact location of all retail outlets and vacant premises.

GOAD Reports

Provide a snap-shot of the retail status or demographic make-up of Goad surveyed town centres. Provides a comprehensive breakdown of floorspace and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial/Business Services and Vacancy sectors.

Local Centre

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

Net Floorspace

Represents the level of internal area devoted to the sale of goods.

Market Share

Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility.

National Multiple

This is a retail or service operator which is or part of a network of nine or more outlets.

Price Base

The price base for the Study is 2012; all prices are or have been adjusted to 2012 in order to be consistent.

Rates of Productivity

This takes into account the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.).

Sales Density

Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure





identified. This is based on the typical turnover of a store by square metre/foot.

- Special Forms of Trading** Defined by Experian as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls.

- Study Area** This represents the household survey area, which is based on postal sectors.

- Trade Draw** This refers to the level of trade attracted to a particular facility/centre.

- Turnover** The turnover figure relates to the annual turnover generated by existing retail facilities.

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



Appendices



Appendix 1 – Study Area Plan



Luton Borough Council

Luton Retail Study
Study Area



Not to scale Do not scale from this drawing



A076628

November 2012

A076628_Study Area.cdr

5th Floor, Longcross Court, 47 Newport Road, Cardiff CF24 0AD
Tel: +44 (0) 29 2082 9200 Fax: +44 (0) 29 2045 5321
Email: info@wyg.com www.wyg.com

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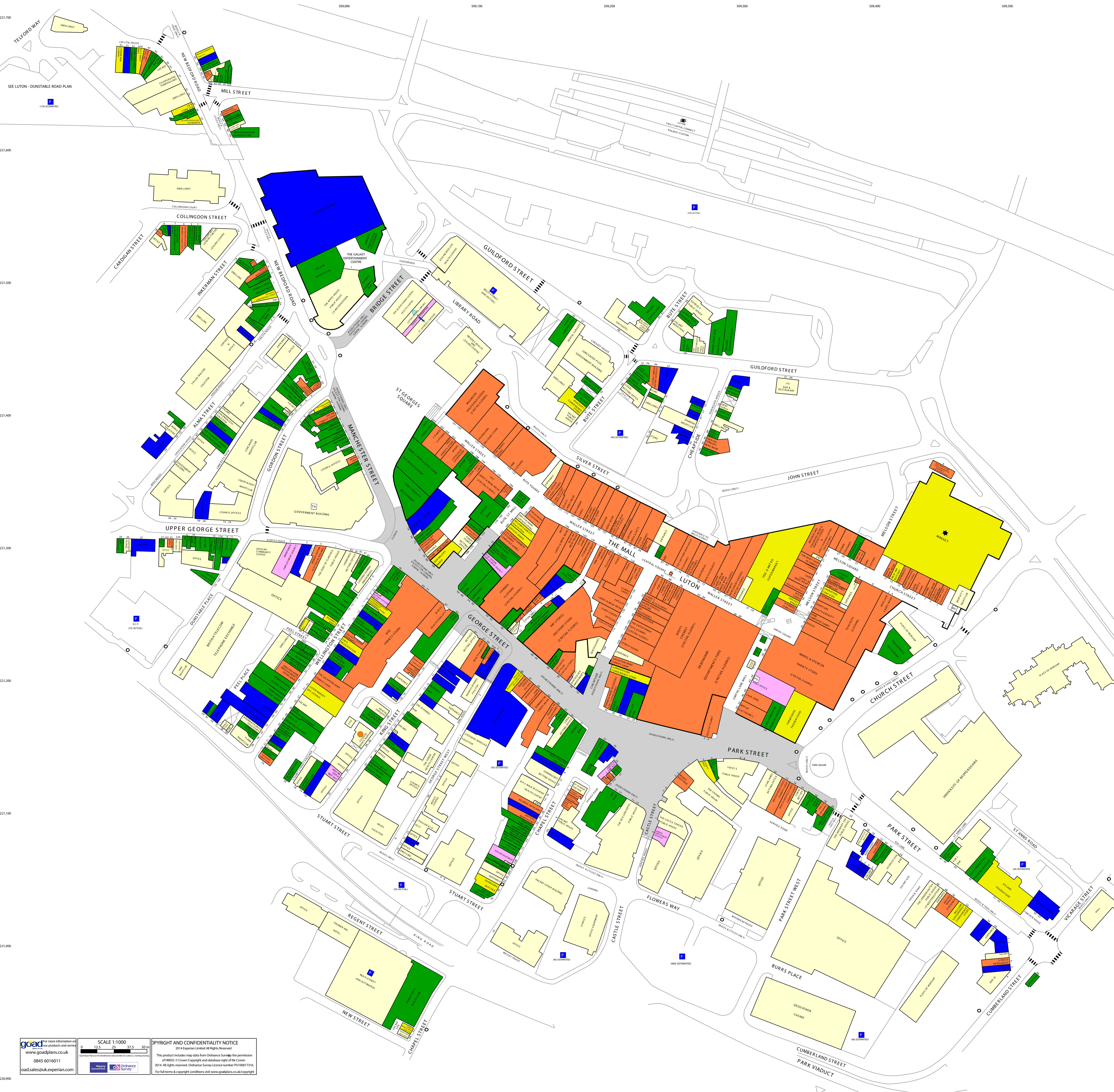
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Appendix 2 – Goad Plan Luton Town Centre

LUTON

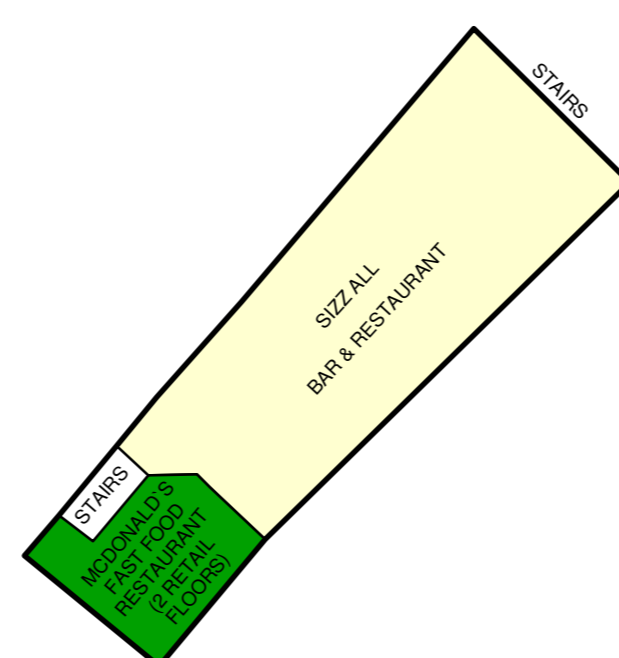
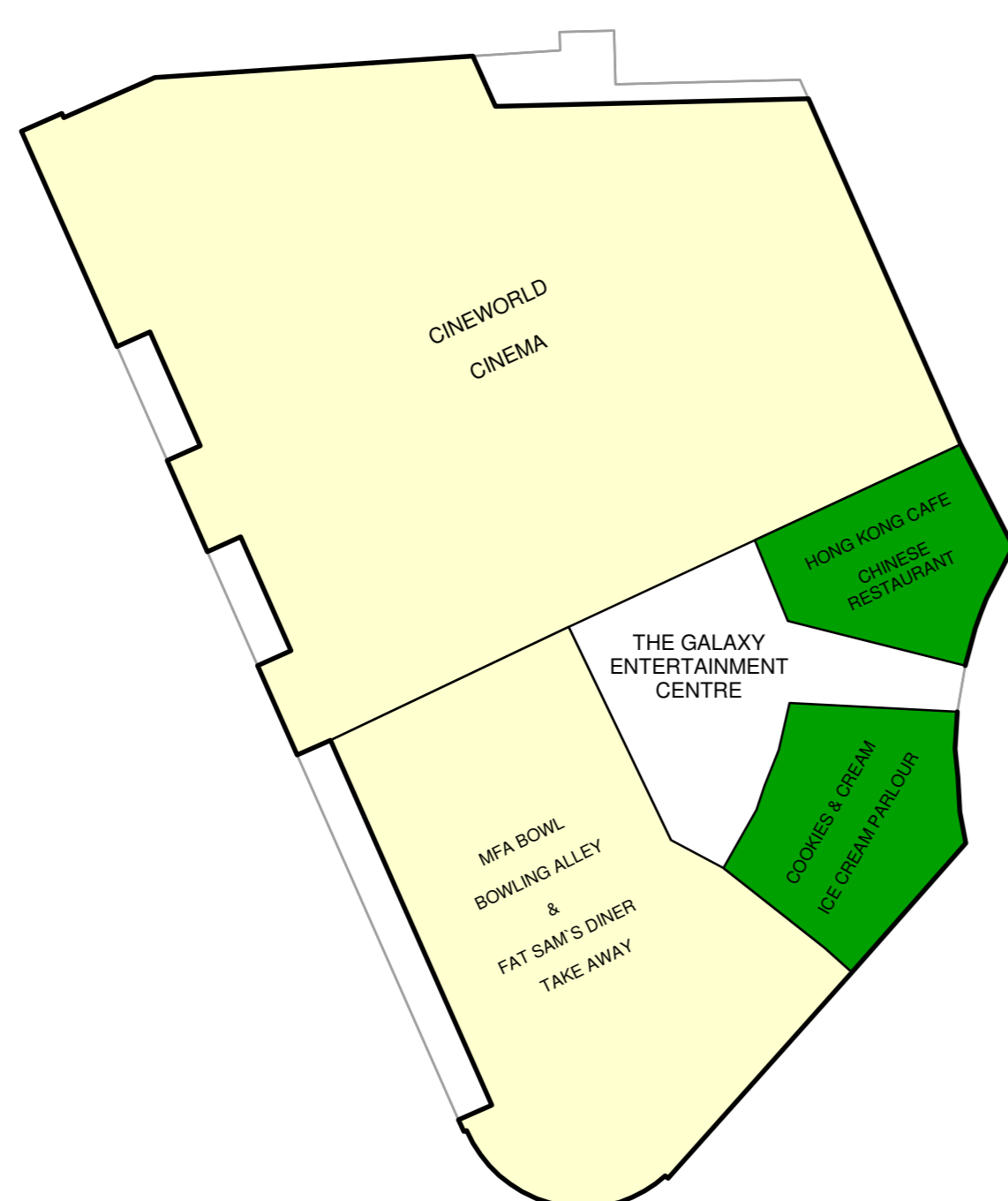
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Appendix 3 – District and Neighbourhood Centre Assessment

Walking Isochrones

Key

Luton Borough Council

Ward boundary

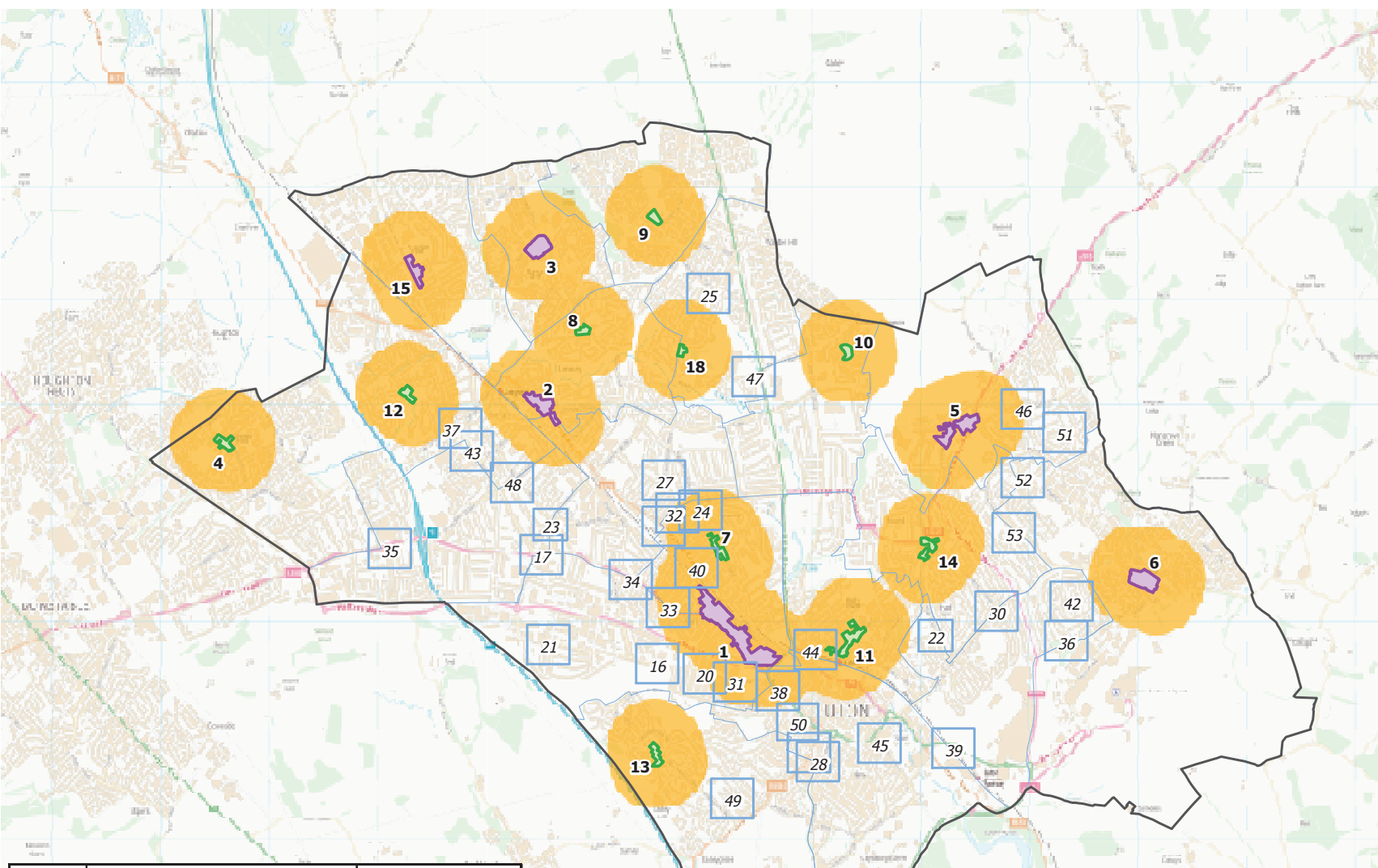
Centre Boundary:

District

Neighbourhood

5 minute walk time from centre (400m isochrone)

Local centre



Ref	Centre Name	Centre Type
1	Bury Park	District
2	Marsh Road	District
3	Purley Centre (Marsh Farm)	District
4	St Dominic's Square	Neighbourhood
5	Stopsley	District
6	Wigmore	District
7	Biscot Road / Blenheim Crescent	Neighbourhood
8	Calverton Road	Neighbourhood
9	Freeman Avenue	Neighbourhood
10	Hancock Drive	Neighbourhood
11	High Town	Neighbourhood
12	Hockwell Ring	Neighbourhood
13	Market Square, Farley	Neighbourhood
14	Round Green	Neighbourhood
15	Sundon Park	District
18	Birdsfoot Lane South	Neighbourhood

Ref	Name
16	Dallow Road Downs
17	Dunstable Road / Waller
20	Dallow Road / Shirely Road
21	Dallow Road / Warren Road
22	Hart Lane
23	Waller Avenue
24	Biscot Road / Ascot Road
25	Birdsfoot Lane North
27	Bishopscote Road
28	Castle Street/Hibbert Street
29	Chapel Street
30	Crawley Green Road
31	Dallow Road/Lyndhurst Road
32	Denbigh Road
33	Dunstable Road/Clairemont Road
34	Dunstable Road/Kingsway
35	Dunstable Road/Stanton Road
36	Eaton Green Road

Ref	Name
37	High Street Leagrave/Grange Avenue
38	Inner Ring Road
39	Kimpton Road
40	Leagrave Road/Saxon Road
41	Leagrave Road/Woodland Road
42	Lynham Road
43	Oakley Road
44	Old Bedford Road
45	Park Street
46	Putteridge Parade
47	Riddy Lane
48	Roman Road
49	The Crossway
50	Wellington Street
51	Westway
52	Wigmore Lane
53	Yeovil Road/Ashcroft Road

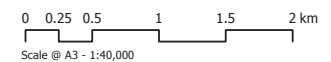




Table 1.0: Facility Checklist Summary – February 2015

Ref No.	Centre	Recommended Designation	Facilities														TOTAL (out of 14)	Other
			Supermarket	Bank	Building society	Restaurant	Library	Post office	Pharmacy	School	Sports centre/ Gym	Place of Worship	Surgery/ Health Centre	Dentist	Community Centre	Nursery/ Day Centre		
5	Stopsley	District	✓	✓	X	✓	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	12	Fire Station
1	Bury Park	District	✓	✓	X	✓	✓	✓	✓	✓	✓	X	✓	✓	✓	X	11	
4	St Dominic's Square	Neighbourhood	✓	X	X	X	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	11	
2	Marsh Road	District	✓	✓	X	✓	✓	✓	✓	X	X	✓	X	✓	✓	✓	10	British Legion.
3	Purley Centre (Marsh Farm)	District	✓	X	X	X	X	✓	✓	✓	✓	✓	✓	✓	✓	✓	10	Police Station, Theatre, Children's Soft Play, Physio
12	Hockwell Ring	Neighbourhood	✓	X	X	X	X	✓	✓	✓	✓	✓	✓	✓	✓	✓	10	
15	Sundon Park	District	✓	X	X	X	X	✓	✓	✓	X	✓	✓	✓	✓	✓	9	E-learning centre neighbouring.
6	Wigmore	District	✓	X	X	✓	X	X	✓	✓	✓	X	✓	✓	✓	X	8	Public House
26	Birdsfoot Lane South	Neighbourhood	✓	X	X	✓	X	✓	✓	✓	X	✓	X	X	✓	X	7	
11	High Town	Neighbourhood	X	X	X	✓	X	X	✓	✓	✓	✓	✓	X	✓	X	7	
9	Freeman Avenue	Neighbourhood	✓	X	X	X	X	X	✓	✓	X	✓	✓	✓	✓	X	7	Public House, Learning Centre
7	Biscot Road/ Blenheim Crescent	Neighbourhood	✓	X	X	X	X	✓	✓	X	X	✓	✓	X	X	✓	6	
13	Market Square, Farley	Neighbourhood	✓	X	X	X	X	✓	✓	✓	X	X	✓	X	✓	X	6	Petrol station.
10	Bushmead (Hancock Drive)	Neighbourhood	✓	X	X	✓	X	X	✓	X	X	✓	X	X	✓	X	5	Public House.
8	Calverton Road	Neighbourhood	✓	X	X	✓	X	✓	✓	✓	X	X	X	X	X	X	5	
14	Round Green	Neighbourhood	X	X	X	✓	X	✓	X	X	X	X	X	X	X	X	2	Vets, Public House.

Table 1.1: Availability of Facilities – Summary

Ref	Centre	Recommended Designation	No of Available facilities
5	Stopsley	District	12
1	Bury Park	District	11
4	St Dominic's Square	Neighbourhood	11
12	Hockwell Ring	Neighbourhood	10
3	Purley Centre (Marsh Farm)	District	10
2	Marsh Road	District	10
15	Sundon Park	District	9
6	Wigmore	District	8
26	Birdsfoot Lane South	Neighbourhood	7
9	Freeman Avenue	Neighbourhood	7
11	High Town	Neighbourhood	7
7	Biscot Road/ Blenheim Crescent	Neighbourhood	6
13	Market Square, Farley	Neighbourhood	6
8	Calverton Road	Neighbourhood	5
10	Bushmead (Hancock Drive)	Neighbourhood	5
14	Round Green	Neighbourhood	2

Source: WYG Site visit January 2015

- 1.1.1 A number of key characteristics influence a centre's designation such as the mix and scale of retail/service uses, geographical location, accessibility, proximity of competing centres etc. Overall, the status of the centres generally reflects the mix of available key facilities/services. Neighbourhood centres with a high number of facilities e.g. St Dominic's Square, Hockwell Ring, and Purley benefit from particularly strong representation of community facilities i.e. their neighbourhood status is more befitting of their retail/service offer.
- 1.1.2 The healthchecks have found most centres are in relatively good health, despite some continued physical shortcomings. Most centres retain the potential to bolster their retail/service and community uses, assuming any centre-specific physical constraints can be resolved. Some smaller neighbourhood centres have a limited mix of some key facilities in spite of their strategically important location e.g. Round Green. Council investment to ensure the future viability of these comparatively 'weaker' centres should be encouraged.
- 1.1.3 In terms of convenience supermarkets, some centres lack what can reasonably be described as an 'anchor' store: High Town and Round Green. Sundon Park now benefits from an anchor foodstore permission¹ and accounting for its anticipated delivery is considered to be more comfortably described as a District centre.

¹ 14/00849/FUL



- 1.1.4 Broadly, the scale of existing supermarket provision is commensurate with the status of the respective centres. Most centres were assessed as having Post Offices albeit the national trend continues to see post office services migrate online.
- 1.1.5 A notable trend across most centres is the relative dearth of restaurants available. Only around half of the assessed centres provide restaurants. Such uses are important to the night time economy and help prevent centres becoming deserted beyond the normal working day.
- 1.1.6 In terms of financial services, no building societies were recorded in any of the assessed district and neighbourhood centres, with bank availability also limited (Bury Park, Purley and Marsh Farm). National service providers are continuing to consolidate their representation in higher order, town centres and other services are migrating onto the internet (online banking).
- 1.1.7 The availability of local pharmacies/chemists remains good across the assessed centres. Some facilities are somewhat inconveniently located beyond the centre boundary (e.g. Marsh Road). Only one of the sixteen assessed centres (Round Green) lacks a pharmacy/chemist. Seven centres currently lack any Surgery/Health centre or Dental practice.
- 1.1.8 The reduction/ consolidation of libraries is a noted national trend as more resources are shared and/or migrate online. In Luton there have been some closures of local library services at a number of assessed centres. Only four of the sixteen assessed centres have library facilities.
- 1.1.9 There is little sports centre representation within the assessed centres. Although, many centres are located near to schools which are equipped with some sports facilities which can be made available to the public. Only Marsh Farm, Wigmore Centre and St Dominic's Square offer formal sports/gym facilities.
- 1.1.10 Places of worship are not currently represented in six centres. In some of the larger centres (e.g. Bury Park) there are a good mix of churches, mosques etc which cater well for a multi-faith local community.



Table 1.2: Total Centre floorspace (2012/2015) - Summary

Ref	Centre	Year	No. of uses	Total floorspace (sqm gross)
1	Bury Park	2012	240	21,309
		2015	263	22,186
2	Marsh Road	2012	62	8,141
		2015	69	8,128
6	Wigmore	2012	6	5,179
		2015	12	5,427
11	High Town	2012	73	3,741
		2015	89	5,244
3	Purley Centre (Marsh Farm)	2012	13	880
		2015	18	1,378
4	St Dominic's Square	2012	14	953
		2015	17	1,307
5	Stopsley	2012	43	2,800
		2015	59	3,215
15	Sundon Park	2012	34	2,388
		2015	40	2,604
7	Biscot Road / Blenheim Crescent	2012	28	1,231
		2015	33	1,593
13	Market Square, Farley	2012	13	1,182
		2015	17	1,267
10	Hancock Drive	2012	10	1,072
		2015	12	1,021
14	Round Green	2012	23	855
		2015	29	855
8	Calverton Road	2012	13	802
		2015	13	802
12	Hockwell Ring	2012	8	654
		2015	11	654
9	Freeman Avenue	2012	5	125
		2015	7	104
26	Birdsfoot Lane South	2012	7	578
		2015	10	673

Source: LBC Survey data updated by WYG 2015. Excludes unclassified and community uses. ²

² 2012 figures may not tally with 2012 Refresh as discrepancies in 2012 data reconciled in 2015 update.



Table 1.3: Diversity of Use - Percentage Floorspace Summary (2012/2015)

Ref	Centre	Year	Convenience (%)	Comparison (%)	Service (%)	Misc (%)	Vacant (%)	Total (%)
1	Bury Park	2012	30.3	43.6	24.0	0.0	2.1	100
		2015	33.2	40.6	22.8	0.0	3.4	100
2	Marsh Road	2012	42.0	31.5	24.4	0.6	1.4	100
		2015	43.4	19.5	25.5	0.6	10.9	100
3	Purley (Marsh Farm)	2012	45.9	6.4	30.8	7.4	9.5	100
		2015	29.3	4.1	10.3	4.7	51.7	100
4	St Dominic's Square	2012	62.7	9.9	15.4	4.9	7.0	100
		2015	45.8	17.3	28.2	3.6	5.1	100
5	Stopsley	2012	27.5	24.1	46.2	0.7	1.5	100
		2015	23.6	25.5	48.3	1.2	1.3	100
6	Wigmore	2012	89.6	0.0	10.4	0.0	0.0	100
		2015	85.5	0.0	9.6	0.0	4.9	100
7	Biscot Road / Blenheim Crescent	2012	46.0	26.0	11.5	8.7	7.9	100
		2015	32.1	28.4	28.5	6.7	4.3	100
8	Calverton Road	2012	39.9	12.7	41.0	6.4	0.0	100
		2015	39.9	12.7	41.0	6.4	0.0	100
9	Freeman Avenue	2012	16.8	29.6	53.6	0.0	0.0	100
		2015	20.2	35.6	44.2	0.0	0.0	100
10	Hancock Drive	2012	34.2	18.8	42.2	0.0	4.8	100
		2015	35.9	33.9	30.2	0.0	0.0	100
11	High Town	2012	25.7	31.8	40.6	0.0	2.0	100
		2015	16.0	20.2	28.6	0.0	35.2	100
12	Hockwell Ring	2012	50.2	12.8	18.5	9.9	8.6	100
		2015	50.2	17.1	14.2	9.9	8.6	100
13	Market Square, Farley	2012	50.9	21.2	27.9	0.0	0.0	100
		2015	50.8	13.1	29.4	6.6	0.0	100
14	Round Green	2012	24.3	18.1	43.7	3.9	9.9	100
		2015	24.3	18.1	50.3	3.9	3.4	100
15	Sundon Park	2012	30.3	27.7	37.7	2.9	1.4	100
		2015	23.5	24.7	40.2	0.0	11.6	100
26	Birdsfoot Lane South	2012	48.8	30.3	20.9	0.0	0.0	100
		2015	41.9	26.0	18.0	0.0	14.1	100

Table 1.4 National Retailers in Centres (2012/2015)

Ref	Centre	Year	Total No. of Units	Total No. of National Operators	% National Operators
1	Bury Park	2012	240	7	2.9
		2015	263	7	2.7
2	Marsh Road	2012	62	15	24.2
		2015	69	13	18.8
3	Purley Centre (Marsh Farm)	2012	6	3	50.0
		2015	12	2	16.7
4	St Dominic's Square	2012	73	3	4.1
		2015	89	3	3.4
5	Stopsley	2012	43	7	16.3
		2015	59	9	15.3
6	Wigmore	2012	6	4	66.7
		2015	12	4	33.3
7	Biscot Road/ Bleinham Cres	2012	28	1	3.6
		2015	33	2	6.1
8	Calverton Road	2012	13	1	7.7
		2015	13	1	7.7
9	Freeman Avenue	2012	5	1	20.0
		2015	7	2	29.0
10	Hancock Drive	2012	10	1	10.0
		2015	12	2	16.6
11	High Town	2012	73	2	2.7
		2015	89	3	3.4
12	Hockwell Ring	2012	8	1	12.5
		2015	11	1	9.1
13	Market Square (Farley)	2012	13	3	23.1
		2015	17	4	23.5
14	Round Green	2012	23	1	4.3
		2015	29	1	3.4
15	Sundon Park	2012	34	3	8.8
		2015	40	6	15.0
26	Birdsfoot Lane South	2012	7	1	14.3
		2015	10	2	20.0

1.1.11 The number of national operators in a centre can provide an important indicator of the confidence in a location. The table above outlines the number of national operators in the assessed centres as a percentage of total units.

1.1.12 Generally larger centres tend to offer more national multiples. The obvious local exception to this is Bury Park centre. Bury Park is one of the largest, strongest performing district centres in the borough but displays the lowest proportion of national operator representation at



around 3%. Notwithstanding this, the centre continues to display very strong representation by niche and independent stores.

BURY PARK

ADDRESS	Dunstable Road, Leagrave Road
DESCRIPTION	<p>Bury Park centre is located to the north west of Luton town centre along Bury Park Road. The centre is a sprawling linear centre that in addition to typical local services also provides numerous and varied mix of multi-cultural uses catering for the local population and visitors.</p> <p>The centre lies a short walk to the town centre to the south and Luton Town football club at Kenilworth Road to the west.</p>
CURRENT STATUS	District Centre



View looking north along Bury Park



Nadeem Plaza at junction of Dunstable and Leagrave Road.

DIVERSITY OF USES	August 2012 No.	January 2015 No.	COMMUNITY FACILITIES	TOTAL: 20
Convenience	40 (17%)	43 (18%)	<ul style="list-style-type: none"> • Islamic Cultural Society Central Mosque • x 2no. Churches - Calvery Church of God & United Reformed • Community Resource Centre • Bury Park Educational Institute • x 2no. Primary Schools • Beech Hill Conservative Club • X2 no. Dental Practices • Restoration Revival Fellowship Memorial Hall 	
Comparison	87 (37%)	91 (39%)		
Service	97 (42%)	93 (40%)		
Miscellaneous	0 (0%)	0 (0%)		
Vacant	9 (4%)	8 (3%)		
Total No. of Uses	233	235	NATIONAL OPERATORS	TOTAL: 6
			<ul style="list-style-type: none"> • Sainsbury's • Lidl • KFC • Barclays • Coral • Let's Move 	

<p>USES</p>	<p>Bury Park is the largest district centre in Luton. The centre has approximately 235 retail/service units in total. The majority of these units are located along Dunstable Road and Leagrave Road. The mix of the units is diverse with convenience, comparison and services all highly represented. This large critical mass of units generates significant visitor attraction which ensures the centre is buoyant throughout most of the day and evening.</p> <p>Independent units are very well represented and dominate the centre. These include many convenience and comparison units such as grocers and fashion shops which also cater for particular multi-cultural requirements. National multiples are less well represented but include: William Hill, Coral, KFC and Chicken Cottage. The centre is also anchored by a Sainsbury's and Lidl supermarket at the south of the centre.</p> <p>The service offer includes a large variety of restaurants and takeaways, many catering for Halal requirements. Similarly the centre is well represented by hairdressers, solicitors and other financial services. Typical high street banks are poorly represented for a centre of its size.</p> <p>In terms of community uses, the centre is well catered for. The only notable absence appears to be a community sports centre. Vacancies are not prominent and have decreased since the centre audit carried out in 2012.</p>
<p>PEDESTRIAN FLOWS</p>	<p>The range and mix of uses at Bury Park centre ensures high levels of footfall, in spite of the heavy volumes of passing traffic along Dunstable Road and Leagrave Road, particularly at peak periods. There is evidence of public realm improvements including footway widening along Dunstable Road. These improvements help increase pedestrian movement, albeit the sprawling nature of the centre may dissuade some visitors from travelling the entire length of the centre e.g. those with sensory and/or physical impairments. Textured surfaces and signage appear to be recent additions to the streetscene which help to reduce speeds of the generally dominant vehicular traffic. Pedestrian crossings assist ease of movement albeit this can still be problematic at the centre's busiest periods due to the sheer mass of traffic. Street benches encourage pedestrian activity.</p> <p>Some areas of the public footways along the centre (e.g. Dunstable Road) have been occupied by vendors and are being used to display extra merchandise. These</p>

	<p>ad hoc stalls/ sales areas encroach pedestrian walkways in places and can inhibit movement to some extent. Advertisement billboards also obstruct flows in places.</p>
<p>ACCESSIBILITY</p>	<p>The centre occupies a location within the Borough where a number of strategic highway routes converge near to the town centre. This means the centre is highly accessible but experiences high volumes of traffic for much of the day/evening. Access to the centre is easy by vehicle via the A505 and A6. Dunstable Road has traffic calming measures although the area still appears to experience some vehicle congestion. Aside from the private Sainsbury's/Lidl car parks to the south of the centre two small Council-owned car parks; Birch Link and Beech Hill also serve the centre. Opportunities for parking overall are somewhat limited. There are some on street parking refuges for passing traffic however these appear insufficient for a centre of this size. Some unlawful parking on pedestrian footways was observed which further inhibits visitor flows on foot.</p> <p>Cycle parking stands are available along Dunstable Road which are well utilised.</p> <p>The centre is highly accessible by public transport with multiple bus stops located along Dunstable Road. Luton Railway Station is a 15 minute walk away.</p>
<p>PERCEPTION OF SAFETY</p>	<p>There are visible public CCTV installations monitoring the centre, is well lit and the perception of safety in the centre is generally high. The activity levels of the centre ensures high natural surveillance. Residential units at higher levels overlook much of the street.</p>
<p>ENVIRONMENTAL QUALITY</p>	<p>Public realm improvements along Dunstable Road including footway resurfacing, widening and the addition of street furniture such as bollards and benches enhance the pedestrian experience. Soft landscaping also enhances the environmental quality of the centre.</p> <p>Nadeem Plaza provides a prominent landmark building at the junction of Dunstable Road and Leagrave Road which is helpful for visitors unfamiliar with the centre.</p> <p>While the benches and bollards are welcome additions to the street, the various CCTV installations, adverts, light-posts, billboards and merchandise found across much of the centre cumulatively create a lot of 'visual clutter' which can detract from the overall visitor experience.</p> <p>Bus shelters include digital displays which inform of services. Numerous ATMS are</p>

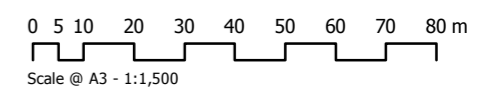
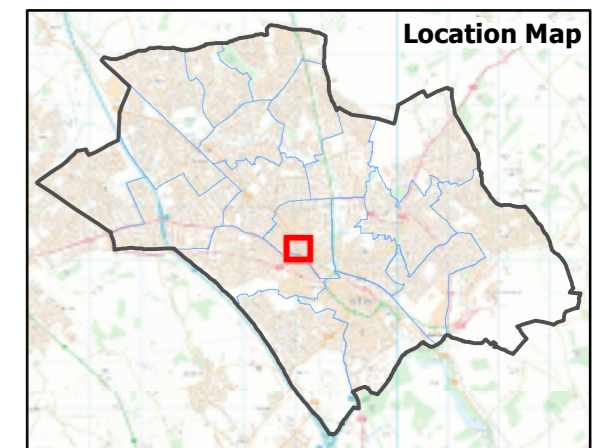
	<p>also located throughout the centre.</p> <p>Leagrave Road is less well maintained compared to Dunstable Road. Further road improvements appear to be underway at this location.</p> <p>Overall, the centre is clean and free from litter with the vast majority of units being well maintained, displaying vibrant signs and are welcoming. The environmental quality of the centre is generally high.</p>
CONCLUSION	<p>There has been little discernible change at the centre since the last audit in 2012. Bury Park remains the largest district centre in Luton, with a broad range of retail, service and community facilities. The centre is very busy and buoyant. The supermarkets located at the south of the centre represent important anchor stores but the very healthy mix of independent traders cater for varied multi-cultural requirements.</p> <p>Pedestrian flows remain high despite the large volumes of traffic experienced along Dunstable Road and Leagrave Road which can detract from the visitor experience, despite traffic calming. Nevertheless, the centre occupies a very central, accessible location and is well served by public transport.</p> <p>Public realm improvements have enhanced the environmental quality of the centre. The centre remains well maintained, tidy and is perceived to be safe. The varied community facilities available at the centre ensure many trips to the centre for reasons other than shopping. The centre is considered a buoyant, vital and viable district centre.</p>
KEY ISSUES	<ul style="list-style-type: none"> • Continued paucity of banking services • Dominant vehicular traffic still appears problematic at peak periods
RECOMMENDED DESIGNATION	District

Key

- District centre boundary
- Neighbourhood centre boundary
- Retail frontage as identified by LPA

Goat Classification

- Convenience
- Comparison
- Service
- Unclassified
- Miscellaneous
- Vacant
- Community Facilities



Luton Retail Study
Refresh

Bury Park (2 of 3)

1b

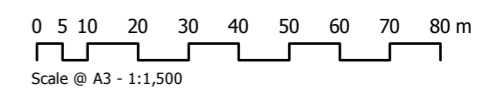
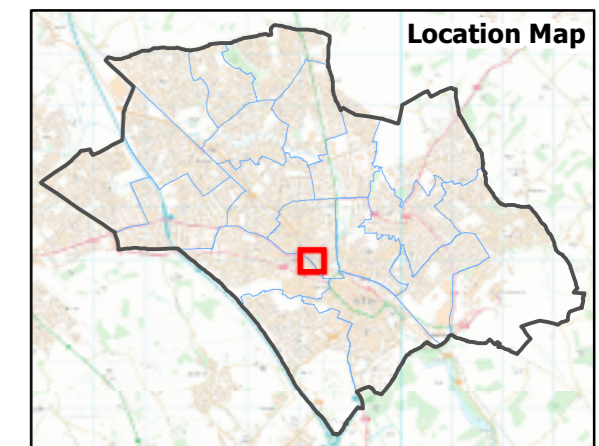


Key

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- Neighbourhood centre boundary
- Retail frontage as identified by LPA

Goad Classification

- Convenience
- Comparison
- Service
- Unclassified
- Miscellaneous
- Vacant
- Community Facilities



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5th Floor, Longcross Court, 47 Newport Road, Cardiff CF24 0AD
 ☎ +44 (0)29 2082 9200 ✉ cardiff@wyg.com 🌐 www.wyg.com

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Luton Retail Study
Refresh

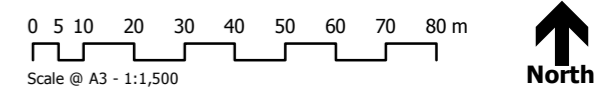
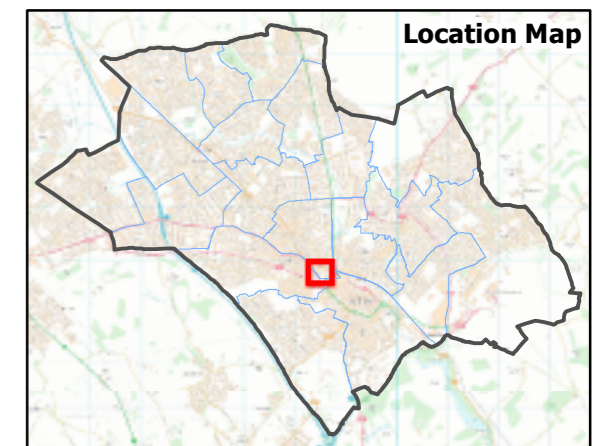
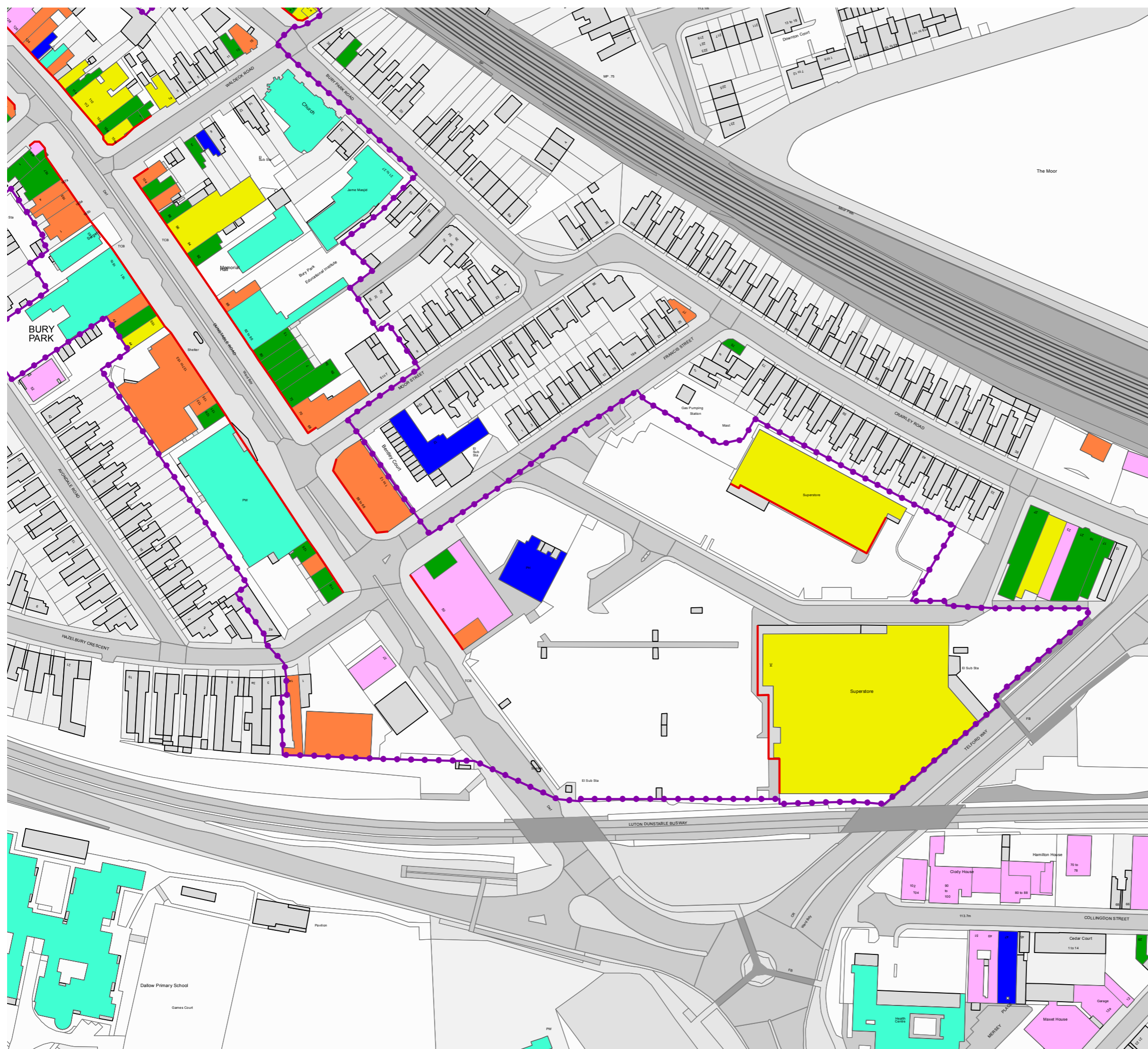
Bury Park (3 of 3) 1c

Key

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MARSH ROAD

ADDRESS	Marsh Road
DESCRIPTION	Marsh Road is a large linear centre to the north-west of the Luton built-up area. The centre is set within a predominantly residential setting and is relatively suburban in character and forms one of the Borough's larger centres. Leagrave train station lies in close proximity to the west. Marsh Road itself provides a direct route south towards the town centre via Leagrave Road and Dunstable Road. Marsh Road It is anchored by a Cooperative, Iceland and Lidl supermarkets.
CURRENT STATUS	District Centre



View north along Marsh Road

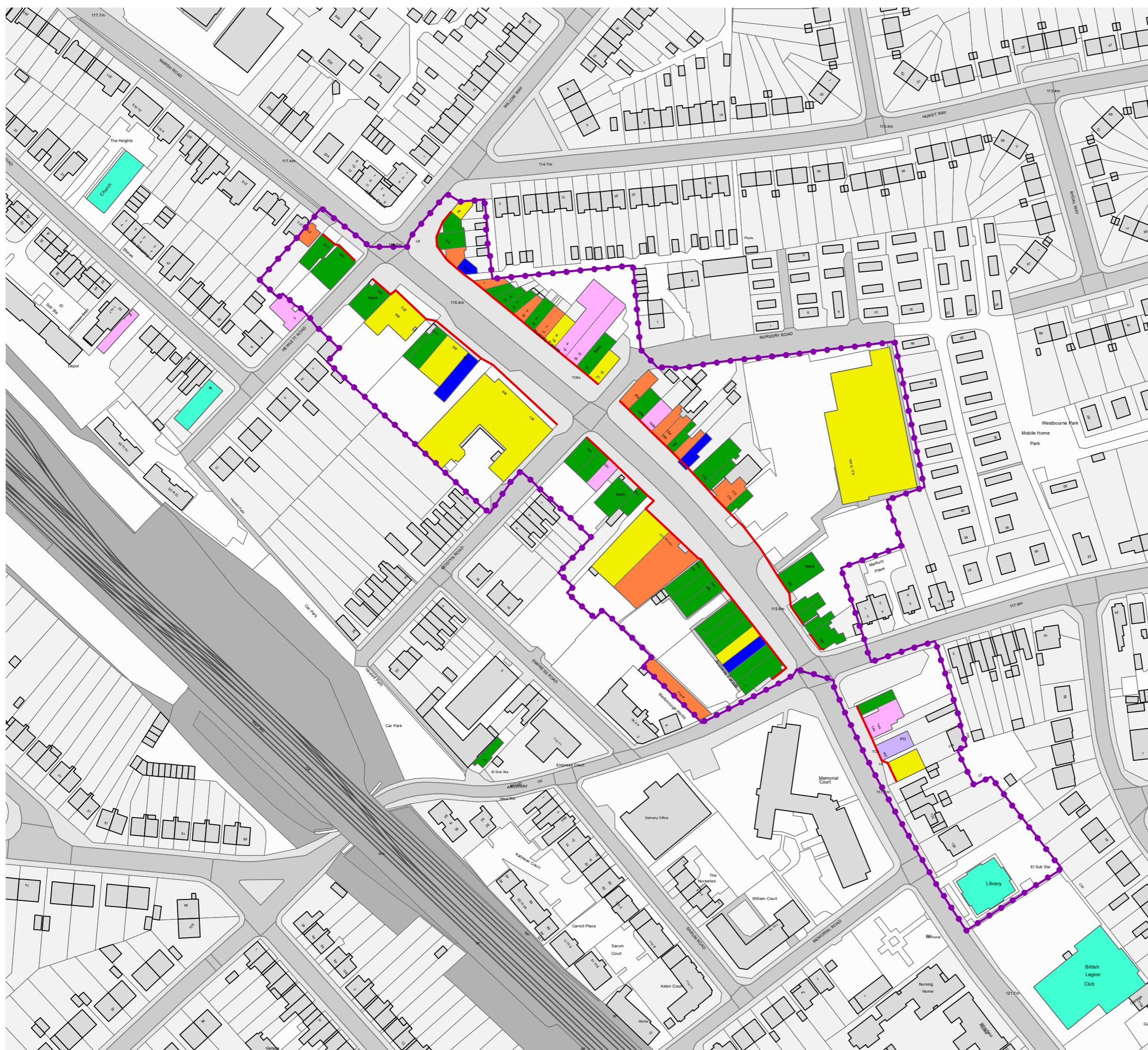


View south along Marsh Road

DIVERSITY OF USES	August 2012 No.	January 2015 No.	COMMUNITY FACILITIES	TOTAL : 6
Convenience	8 (13%)	9 (15%)	<ul style="list-style-type: none"> • Leagrave Library • Mount Pleasant Methodist Church • Marsh Road Dental Practice • Salvation Army Hall • Bizzie Bees Nursery 	
Comparison	16 (26%)	12 (19%)		
Service	34 (55%)	35 (56%)		
Miscellaneous	1 (2%)	1 (2%)		
Vacant	3 (5%)	5 (8%)		
			NATIONAL OPERATORS	TOTAL: 15
Total No. of Units	62	62	<ul style="list-style-type: none"> • The Co-operative • Premier • Iceland • Lidl • Blockbuster • Natwest • HSBC • Barclays 	<ul style="list-style-type: none"> • Lloyds TSB • Papa Johns • Pizza Hut • Greggs • Betfred • Coral • William Hill.

<p>USES</p>	<p>The centre is large and consists of approximately 62 units in total. There is a good mix of different types of units. Convenience, comparison and service uses are all generally well represented.</p> <p>Convenience representation is good and has increased since 2012. It includes Lidl, Iceland, Cooperative and Premier stores which anchor the centre and cater for good passing trade. Since 2012, a Morrison’s Local store replaced the vacant Blockbuster unit on Marsh Road further bolstering the convenience offer for a short period. This store is now understood to have closed, operating for less than 2 years. Comparison representation has reduced since 2012 but remains healthy for a centre of this size. There remains a good offer of national service multiples in the centre; these include many banks i.e. Barclays, Natwest, HSBC and Lloyd TSB but also Pizza Hut, William Hill and Coral. Estate agents, takeaways and hairdressers are all represented. The centre is served by a post office.</p> <p>The centre still benefits from numerous community facilities including a library and community church (including pre-school).</p> <p>The recorded vacancy rate remains low and the trading environment appears buoyant.</p>
<p>PEDESTRIAN FLOWS</p>	<p>The centre benefits from a good mix of uses which ensure high levels of pedestrian activity. The surrounding area is predominantly residential which ensure good potential for walk-in trade. Footways along the centre lining Marsh Road are wide which encourages movement throughout the centre on foot. Pedestrian crossings and dropped kerbs are clearly legible and conveniently located along Marsh Road which assists these movements. Although Marsh Road is relatively busy with passing car-borne traffic, pedestrian movement is considered easy and safe with traffic speeds limited to 20mph in the core-area.</p> <p>Some important uses such as the dental surgery and pharmacy are located beyond the core area (to the south along Marsh Road and Gardenia Avenue). These are somewhat divorced from the rest of the centre. The inconvenient location of these uses is likely to discourage visits on foot.</p>
<p>ACCESSIBILITY</p>	<p>The centre has good accessibility by car and public transport.</p> <p>In terms of public transport, Legrave Station is located within close proximity of the centre, within reasonable walking distance of the retail core. Marsh Road is</p>

	<p>an existing bus route with a number of bus stops dotted along the centre.</p> <p>A number of national retailers at the centre including The Co-operative, Lidl and Iceland have customer car parking facilities, reducing the pressures on on-street parking. On-street parking along Marsh Road is available but limited, however these allow for some opportunistic visits from passing traffic. A number of fixed bicycle stands cater for cyclists.</p>
<p>PERCEPTION OF SAFETY</p>	<p>Natural surveillance from footfall is high throughout daylight hours. Despite the lack of public CCTV installations, the buoyancy of the centre and limited vacancies is considered to reduce the potential for anti-social behaviour. A good mix of community facilities and restaurants/takeaways help the centre maintain a degree of activity during evening hours.</p> <p>Overall the centre is perceived as safe, with low potential for crime or anti-social behaviour.</p>
<p>ENVIRONMENTAL QUALITY</p>	<p>Marsh Road has appeared to benefit from recent investment in the public realm. The quality of the environment is high, and modern street furniture including benches, bins, planting and textured paving is apparent. Footways are wide, clearly legible and well maintained. This public investment contributes to the perception of safety.</p> <p>The centre is clean and free from litter and most shops are vibrant.</p>
<p>CONCLUSION</p>	<p>Marsh Road continues to perform as a healthy, buoyant centre which benefits from its substantial mix of uses. Convenience and service uses are particularly well represented. There has been a reduction of comparison representation since 2012, but this does not give rise to concern. The centre benefits from good public transport links and a complement of community facilities which draw the local population to the centre for reasons other than purely shopping. The surrounding residential population continues to ensure high potential for walk-in trade. Parking provision is available although primarily to patrons of private stores.</p> <p>The centre is perceived to be safe, well maintained and welcoming. Recent public realm improvements have enhanced the visitor experience. The centre is considered to be a vital and viable district centre.</p>
<p>KEY ISSUES</p>	<ul style="list-style-type: none"> • Lack of public parking provision
<p>RECOMMENDED DESIGNATION</p>	<p>District</p>

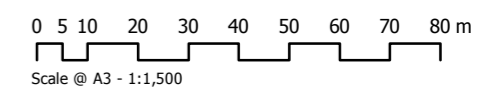
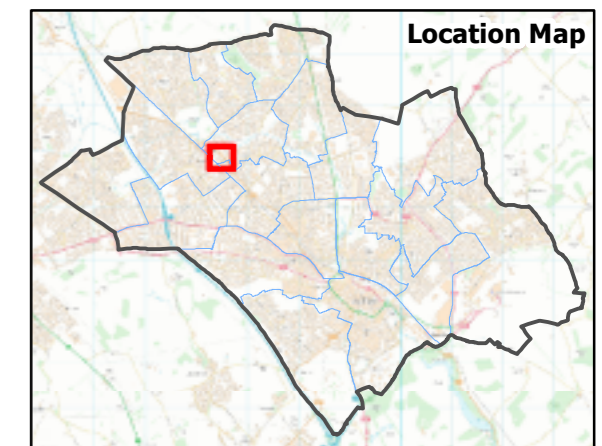


Key

- District centre boundary
- Neighbourhood centre boundary
- Retail frontage as identified by LPA

Goad Classification

- Convenience
- Comparison
- Service
- Unclassified
- Miscellaneous
- Vacant
- Community Facilities



PURLEY CENTRE (MARSH FARM)	
ADDRESS	The Moakes, Purway Close
DESCRIPTION	<p>The centre is primarily made up of a 1960s era enclosed precinct of shops attached to a six storey high rise residential development, together with ancillary units served by a dedicated surface level car park and first floor parking on the precinct's roof. Various community and enterprise/local business uses lie within Marsh Farm Futures House directly north west of the Local Centre.</p> <p>The Purway Close housing area directly adjacent to centre to the east has been demolished and the site lies cleared and secured. WYG understand the centre is now subject to committed mixed use redevelopment proposals.</p>
CURRENT STATUS	Local Centre



Marsh Farm enclosed shopping precinct



Marsh Farm Library and Theatre

DIVERSITY OF USES	August 2012 No.	January 2015 No.	COMMUNITY FACILITIES	TOTAL : 9
Convenience	4 (33%)	4 (29%)	<ul style="list-style-type: none"> Marsh Farm Futures building (mixed use including police station, job centre, physio, daycentre/children's soft play facility) Lea Manor High School Lea Manor Recreation Centre Library Theatre Dentist Health Centre The Holy Cross Church 	
Comparison	1 (8%)	1 (7%)		
Service	4 (33%)	2 (14%)		
Miscellaneous	1 (8%)	1 (7%)		
Vacant	2 (17%)	6 (43%)	NATIONAL OPERATORS	TOTAL: 3
Total No. of Uses	12	14	<ul style="list-style-type: none"> Nisa Local Lloyds Pharmacy Ladbrokes 	

<p>USES</p>	<p>The centre comprises approximately 14 retail/service uses in total set within the shopping precinct. This somewhat limited offer is supplemented by numerous community facilities all within close proximity including a dentist, health centre and church. Since 2012 the Marsh Farm Library has relocated to Lea Manor High School and the Jubilee Community Centre has been demolished with community space provided at Futures House.</p> <p>The centre is served by a post office. The retail/service office of the centre is limited and there is no notable convenience 'anchor' store.</p>
<p>PEDESTRIAN FLOWS</p>	<p>The centre is located within a dense residential setting and should benefit from significant walk-in trade. However, the centre is quite dispersed and the distributed nature is likely to discourage trips on foot, given the local topography, albeit the parade of shops is enclosed and easy to navigate. There appears to be good scope to better integrate the community facilities to the north of the roundabout with the shopping precinct site to the south i.e. through integrative highways improvements to draw together the various facets of the centre. A pedestrian underpass to the north of the shopping precinct allows direct access to/from Marsh Farm housing estate which should encourage local trips on foot.</p>
<p>ACCESSIBILITY</p>	<p>The centre is easily accessed by vehicles via The Moakes. The designated car park is relatively large for a centre of its size and is located directly adjacent to the units.</p> <p>The centre is served by bus stops lying adjacent to the centre's entrance. The centre's small, self-contained nature, good parking provision and bus services ensure good accessibility which should help promote visitor attraction, despite a limited retail offer.</p>
<p>PERCEPTION OF SAFETY</p>	<p>Perceptions of safety are mixed. The dated shopping precinct appears to be particularly vulnerable to crime and anti-social behaviour. The enclosed nature of the precinct reduces footfall and pedestrian activity elsewhere. The high-rise residential properties above the shopping centre provide some limited natural surveillance however the adjacent car park, while convenient, appears particularly vulnerable in the evening/night. The underpass which connects the nearby housing estate is unwelcoming and would appear to discourage trips on foot.</p> <p>There are numerous CCTV installations within the shopping centre which should help reassure visitors, however these also heighten unease. The shopping centre is poorly lit, with limited natural sunlight permeating the brick building.</p>

	<p>Elsewhere perceptions of safety are good. The newly developed Marsh Farm Futures House building and redeveloped sports centre are well maintained and welcoming. Bedfordshire Police has local representation in the Futures building.</p>
<p>ENVIRONMENTAL QUALITY</p>	<p>The environmental quality of the centre is also mixed. The quality of the newly redeveloped community facilities to the north of the centre is high. These areas are tidy, free from litter/graffiti, well maintained, although the quality of the shopping precinct is poor. The precinct’s design does not lend itself to successful refurbishment, resulting in the need of comprehensive mixed use redevelopment.</p>
<p>CONCLUSION</p>	<p>Since the 2012 Retail Study Refresh planning permission has been granted at Purley Centre for its comprehensive redevelopment. The development of nine small retail units (circa 1,500 sqm) with 16 flats above ground floor level, three new residential blocks offering 85 flats and 11 houses with associated landscaping and parking (13/00782/FUL) was granted in 2013. The proposed retail units vary in size from 87sqm to 395sqm with two further retail units provided within the existing Futures House.</p> <p>The permitted redevelopment proposes the complete demolition of the outdated shopping precinct with the re-provision of retail facilities to occupy more commercially viable position adjacent to the Moakes roundabout to the north-east (opposite Lea Manor Recreation Centre).</p> <p>The development is proposed to be delivered in phases: Phase 1 will see the retail area with residential above developed; Phase 2 involves the demolition of Purley Centre; and Phase 3 will involve the erection of three residential blocks of flats and houses in home zone areas. A revised proposal has been submitted to the LPA in relation to Phase 1. The proposals seek to reduce the number of retail units to 7 (circa 1,350 sqm) with 24 flats above ground floor level (15/00785/FUL).</p> <p>The phasing allows existing retailers to trade until the new units are completed. The proposed retail precinct will link to the existing public piazza to create an extended public space suitable for a local market.</p> <p>The new units are considered crucial to attracting local shoppers back to the centre. The composition of the units is small and with the lack of a sizeable anchor unit and in face of nearby competition from other nearby centres a</p>

	<p>redeveloped Purley centre will need to rely on its other uses to attract visitors. Notwithstanding this, the unit benefits from a good complement of non-retail facilities. The significant investment in nearby community facilities provides a substantial draw to the centre for reasons other than shopping. These uses are varied, well maintained and welcoming. Overall the proposed retail provision will provide much needed improved facilities, occupying a prominent position on the road. The centre should benefit from passing trade and act as a driver for visitor attraction.</p> <p>The centre has good community provision with potential to accommodate additional merged public services. The delivery of the committed redevelopment proposals should ensure Purley Centre is able to fulfil a viable district centre role.</p>
<p>KEY ISSUES</p>	<ul style="list-style-type: none"> • Current limited retail function • Lack of anchor convenience store • Under invested shopping precinct • Poor perception of safety • Poor environmental quality
<p>RECOMMENDED DESIGNATION</p>	<p>District</p>

Luton Retail Study
Refresh

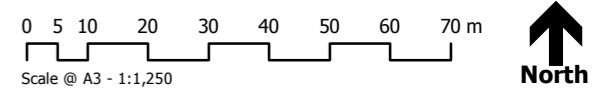
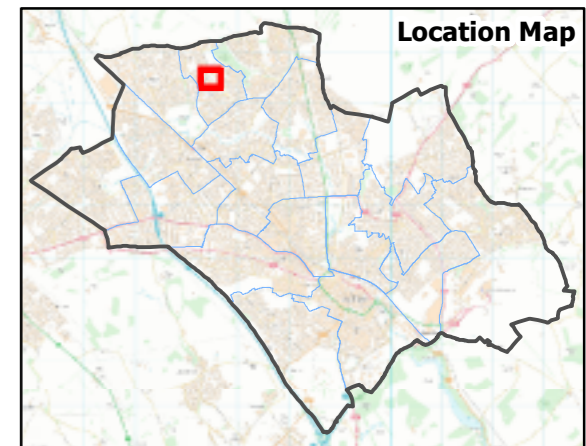
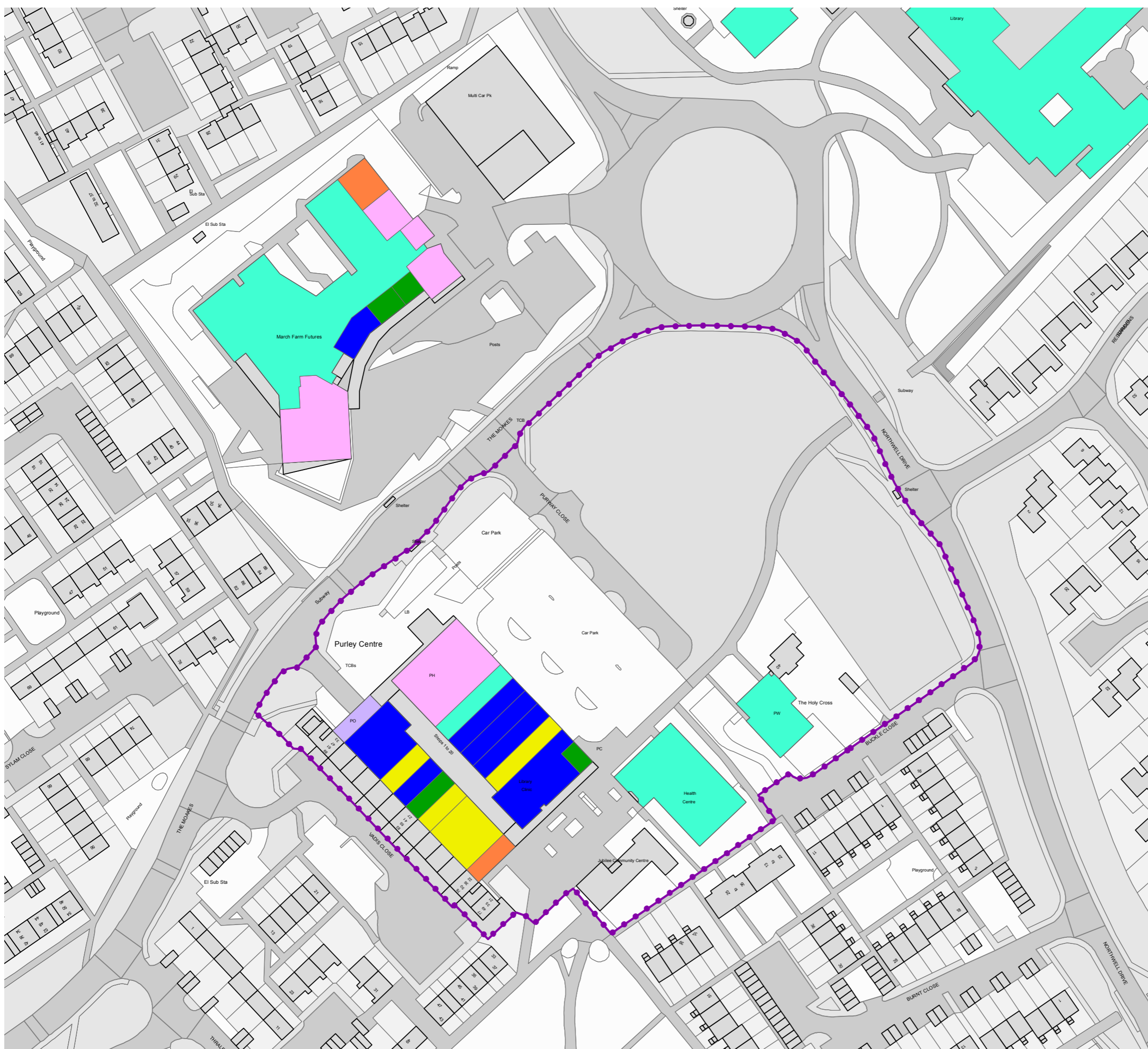
Purley Centre (Marsh Farm) 3

Key

- District centre boundary
- Neighbourhood centre boundary
- Retail frontage as identified by LPA

Goat Classification

- Convenience
- Comparison
- Service
- Unclassified
- Miscellaneous
- Vacant
- Community Facilities



A090023_Luton Centre Plans.mxd February 2015

5th Floor, Longcross Court, 47 Newport Road, Cardiff CF24 0AD
 ☎ +44 (0)29 2082 9200 ✉ cardiff@wyg.com 🌐 www.wyg.com

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SUNDON PARK

ADDRESS	Sundon Park Road/ Hill Rise
DESCRIPTION	The centre is located at the north of the Borough and is focussed around a 3 storey flat roofed parade of shops fronting onto a small car park adjacent to Sundon Park Road. The centre is flanked by further two-three storey pitched roofed terrace properties located to the north and south at the roundabout junction of Sundon Park Road and Hill Rise. A petrol filling station, public convenience and recycling centre occupy a prominent position in front of the main shopping parade. The surrounding area is mixed in character. Closest to the centre residential properties dominate. Commercial units are also located nearby at Scott Road Industrial Estate on Park Avenue to the north.
CURRENT STATUS	District Centre



View of The Parade fronting car park and PFS on Sundon Park Road



Units fronting Hill Rise

DIVERSITY OF USES	August 2012 No.	January 2015 No.	COMMUNITY FACILITIES	TOTAL : 7
Convenience	9 (26%)	7 (21%)	<ul style="list-style-type: none"> Sundon Medical Centre Sundon Dental Practice Lealands High School Sundon Park Baptist Church, E-Learning@Luton 	
Comparison	9 (26%)	9 (26%)		
Service	13 (38%)	15 (44%)		
Miscellaneous	1(3%)	0 (0%)		
Vacant	2 (6%)	3 (9%)		
Total No. of Uses	34	34	NATIONAL OPERATORS	TOTAL : 3
			<ul style="list-style-type: none"> Tesco (Express) Nisa Local Bargain Booze 	

<p>USES</p>	<p>The centre comprises approximately 34 retail/service units. These provide a good mix of convenience, comparison and service uses. Convenience retail provision is mainly provided by the Tesco Express and Nisa, albeit these stores are relatively small for a centre of its size and provide a comparatively limited offer. These are supplemented by other convenience uses at the centre including a newsagents and bakery. Notably, since 2012 the specialist convenience store 'Cake Craft' has closed and been replaced by a hair/beauty salon.</p> <p>WYG note the recent grant of planning permission (Dec 2014) for the erection of an Aldi foodstore (circa 1,535 sqm gross) on land directly adjacent to the centre at Scott Road Industrial Park. If delivered the store will further contribute to activity levels and the surrounding centre is anticipated to benefit through linked trips.</p> <p>Service uses remain reasonably diverse and include a bookmakers, restaurants/ takeaways, café, financial services, opticians, tool hire and laundry services. The centre is also served by a post office. Since 2012 the centre's main post office has closed but postal services now form part of neighbouring Nisa store's offer. The vacant unit has been reoccupied. The centre still lacks bank/building society representation, although Tesco Express has an ATM facility. The centre has 3 vacant unit at the time of survey which does not give rise to concern.</p> <p>The centre is still well served by community uses with many forming part of the core area including a health centre, adult learning centre and church. Since 2012 Sundon Park Public Library has closed and is being marketed. In addition PlayTime Pre-School is currently vacant.</p>
<p>PEDESTRIAN FLOWS</p>	<p>The centre is located within a dense residential setting and should benefit from significant walk-in trade. All areas of the centre are accessible on foot and is reasonably self contained, spread across two adjoining roads with the vast majority of units contiguous. The main parade of shops consists of around 11 units and provides a focus for pedestrian activity, albeit this activity is hampered to some degree by the Sundon Park Road/ Hill Rise roundabout junction and the traffic movements associated with car parking spread throughout the centre. However, pedestrian crossings help slow traffic speeds and enhance pedestrian flows.</p>
<p>ACCESSIBILITY</p>	<p>The centre is primarily accessed by vehicles via Sundon Park Road which is a radial route and provides passing trade. Parking provision is broadly made up of the small car park adjacent to The Parade and designated on-street bays lining</p>

	<p>Sundon Park Road and Hill Rise. Free (time restricted) parking is separated from road traffic by parking refuges which enhances accessibility, making the centre a more convenient top-up destination for car borne visitors. However, the rather dispersed nature of the centre’s parking provision may serve to increase traffic movements throughout the centre. Furthermore, parking space appears to be at a premium, particularly at peak hours.</p> <p>The centre is served by bus stops on Sundon Park Road and Hill Rise. The centre’s self-contained nature, free parking provision and bus services ensure good accessibility which should help promote visitor attraction.</p>
<p>PERCEPTION OF SAFETY</p>	<p>Perceptions of safety are generally good. While there are no obvious sign of public CCTV in operation the centre is set within a residential setting that provides a high degree of natural surveillance. The car parking provision is overlooked by the units themselves and the self contained nature of the centre ensures all areas remain reasonably buoyant. The centre is well lit, well maintained and there are no obvious areas that may be vulnerable to anti-social behaviour.</p>
<p>ENVIRONMENTAL QUALITY</p>	<p>Overall, the environmental quality of the centre remains high. While the shopping parade building is rather tired and would benefit from external maintenance the centre is tidy and litter/graffiti free. Recent public realm improvements, including road/ parking area resurfacing, new paving and bollards to pedestrian areas enhance the appearance of the centre and encourage visitor attraction. Store signs and units are generally well maintained and legible.</p>
<p>CONCLUSION</p>	<p>The centre continues to display a good number and mix of retail and service units. The convenience stores which anchor the centre are relatively small but are supplemented by other facilities which combined are likely to attract good passing trade and benefit from the centre’s location on a radial route.</p> <p>If delivered, the permitted Aldi store will be a welcome addition to the centre. It will attract significant additional passing trade and act as an integral part of the centre. It is recommended the site is included in the centre boundary.</p> <p>The centre has a low vacancy rate, appears buoyant and is enhanced by the various community facilities. The centre is prominently located and is considered accessible.</p> <p>The environmental quality is high. Public realm improvements assist navigation on foot and enhance the streetscene. The centre provides a generally pleasant</p>

	<p>shopping environment.</p> <p>The centre’s main shortcoming is the relatively limited parking provision, which limits visitor attraction to some extent. The delivery of an Aldi foodstore will address the previously noted lack of anchor foodstore and help bolster the centre. In doing so the centre will better meet the profile of a district centre. Accordingly designation as a district centre is now considered appropriate.</p>
<p>KEY ISSUES</p>	<ul style="list-style-type: none"> • Delivery of Aldi foodstore commitment will address lack of anchor convenience provision • Limited parking provision (at peak periods)
<p>RECOMMENDED DESIGNATION</p>	<p>District</p>

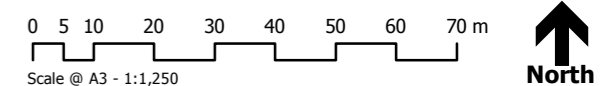
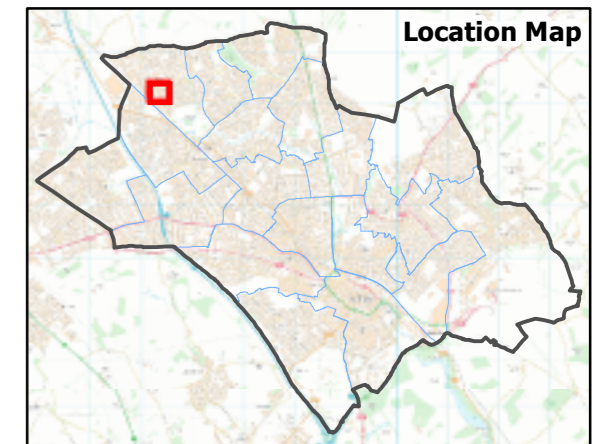


Key

- District centre boundary
- Neighbourhood centre boundary
- Potential expansion area
- Retail frontage as identified by LPA

Goad Classification

- Convenience
- Comparison
- Service
- Unclassified
- Miscellaneous
- Vacant
- Community Facilities



STOPSLEY

ADDRESS	Hitchin Road and Stopsley Green Roundabout
DESCRIPTION	Stopsley is ostensibly a traditional linear centre focussed primarily along Hitchin Road adjacent to Stopsley Green Roundabout. The centre also encompasses Jansel House (c.1960s office block with ground floor retail units) at the opposite side of Stopsley Green Roundabout. Further facilities and shops are located along St. Thomas' Road and Ventia Road. The centre is made up of mostly two storey terraced units (Hitchin Road) and the ground floor units at Jansel House.
CURRENT STATUS	District



View looking north along Hitchin Road



Jansel House

DIVERSITY OF USES	August 2012 No.	January 2015 No.	COMMUNITY FACILITIES	TOTAL : 7
Convenience	6 (14%)	6 (13%)	<ul style="list-style-type: none"> Stopsley Parish Church Stopsley Baptist Church/Tree Top House Youth Centre Stopsley Library Stopsley Village Practice Stopsley Day Centre Community Primary School The Green House Community Centre 	
Comparison	9 (21%)	10 (22%)		
Service	26 (60%)	26 (58%)		
Miscellaneous	1 (2%)	2 (4%)		
Vacant	1 (2%)	1 (2%)		
Total No. of Uses	43	45	NATIONAL OPERATORS	TOTAL : 7
			<ul style="list-style-type: none"> The Cooperative Tesco (Express) Greggs Johnsons the Cleaners Barclays HSBC William Hill 	

<p>USES</p>	<p>The centre is a good size and includes approximately 45 retail/service units. There has been virtually no change in the centre composition since 2012. The centre continues to benefit from a good range and mix of uses. Other community facilities include churches, library, community centre and schools. Stopsley Library remains open in spite of many closures during 2014. In parallel, Stopsley Primary School which forms the community hub of the centre has recently benefitted from a £1.3million expansion. The investment has boosted the number of pupil spaces offered by the school which is likely to contribute positively to the vitality and viability of the centre through increased visits.</p> <p>The centre has a comparatively healthy range of convenience based units. Supermarkets include a Co-operative and a Tesco Express. This is supplemented by Henderson’s Post Office/ Newsagent and Stopsley Wine.</p> <p>Comparison units are mostly independent stores and include antiques specialists, gift shops and charity shops which make up a limited clothing retail offer at the centre. The centre is also served by a pharmacy.</p> <p>Services dominate and consist of a good mix of banks (including ATMs), estate agents, travel agents, bookmakers, hairdressers and café, restaurants and takeaways. The centre’s vacancy rate is very low.</p>
<p>PEDESTRIAN FLOWS</p>	<p>The residential surroundings encourage visits to the centre on foot. The centre’s community facilities boost activity levels within this relatively pedestrian friendly centre. At the core area pavements are wide which helps cater for visitors less physically able, pushchair/ wheelchair users etc.</p> <p>Pedestrian crossings and traffic calming are in place which slow traffic speeds and help allow ease of movement. The centre is dominated by traffic along Hitchin Road and the roundabout to some degree, but vehicle speeds are reduced by speed-humps along Hitchin Road, near to Stopsley Community Primary School. High visibility bollards are also utilised adjacent to the school to improve pedestrian safety at this location.</p> <p>High levels of footfall were apparent during site visits (August 2012 and January 2015), albeit the centre appears prone to congestion near the roundabout at peak times. Pedestrian movement to Jansel House is constrained by the conegstion of</p>

	<p>the Stopsley Green roundabout junction. As such, whilst Jansel House has its own parking, to pedestrians on Hitchin Road this area of the centre feels divorced from the remainder of the centre to some degree. The roundabout dissuades pedestrian movements between areas.</p>
<p>ACCESSIBILITY</p>	<p>The centre displays good access by vehicle via the A505 which appears prone to congestion at peak times. The centre relies predominately on designated on-street parking along Hitchin Road and the dedicated car-park behind the Co-operative and Tesco Express supermarkets. Site visits suggest the centre's existing parking provision presently struggles to cater for demand at peak periods which may increase on-street traffic movements and can exacerbate congestion. Speed is limited to 20mph along Hitchin Road.</p> <p>Accessibility and legibility by car is relatively good. Navigation around the centre is made easy by clear signposting from the A505 which encourages passing trade.</p> <p>Jansel House benefits from its own dedicated car park which is beneficial given it is cut-off from Hitchin Road by Stopsley Green roundabout and relatively self-contained and functions independently to some extent.</p> <p>Stopsley Centre is located on a principal bus route providing links to Luton Town Centre, Luton Airport and infrequent services to London Victoria. Luton Railway Station is located approximately 1.4 miles walk south west of the centre. The centre is considered highly accessible to a variety of modes of transport.</p>
<p>PERCEPTION OF SAFETY</p>	<p>Stopsley is considered to continue to be a safe and pleasant environment. The activity levels both pedestrian and vehicular centred on Hitchin Road encourage a good level of natural surveillance. There is no obvious public CCTV surveillance in operation; however some private properties such as Barclays and HSBC have CCTV surveillance. The public realm is well lit, however the supermarket car park to the rear of Hitchin Road is poorly overlooked which may heighten user anxiety during the evening and leave vehicles vulnerable to crime.</p>
<p>ENVIRONMENTAL QUALITY</p>	<p>The environmental quality of the centre is high. There is evidence of recent public realm improvements including textured surfacing and high visibility bollards. Some of the street furniture including bins and benches appear relatively old and tired and incorporation of street planting or landscaping would break up the expansive pavements which are poorly maintained in places. However, the centre is clean, welcoming and occupied by well maintained units. The centre is</p>

	<p>considered attractive to car borne passing and walk-in trade.</p> <p>The Stopsley War Memorial along Hitchin Road provides an attractive landmark. Solar powered street lighting is in use in certain areas, positively adding to the centre. Overall the centre is relatively tidy and free from litter and graffiti. In terms of built form Jansel House’s imposing, monolithic form is somewhat incongruous with the rest of the centre and detracts from the more traditional character of the Hitchin Road area. However the degree of incongruity is reduced by the segregation of this area of the centre by Stopsley Green roundabout.</p>
<p>CONCLUSION</p>	<p>There has been little discernible change at the centre since 2012. Stopsley continues to be a vital and viable centre with a healthy and varied community function. This complements the well represented retail/service uses, albeit the two main parts of the centre, Hitchin Road and Jansel House still appear to function somewhat independently due to their physical separation by the busy Stopsley Green roundabout. The centre benefits from good public transport links and the vacancy rate remains low. The centre would benefit from improved car parking provision – which remains limited to what appears to be an inadequate car park to the rear of the supermarket and on-street spaces.</p> <p>Notwithstanding this, the centre appears buoyant and displays the vast majority of all of the retail, service and community facilities which are expected at a vibrant district centre.</p>
<p>KEY ISSUES</p>	<ul style="list-style-type: none"> • Dominant vehicular traffic • Inadequate parking provision • Limited scope for physical expansion
<p>RECOMMENDED DESIGNATION</p>	<p>District</p>

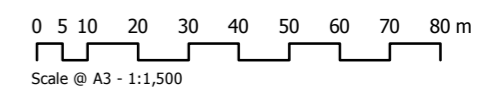
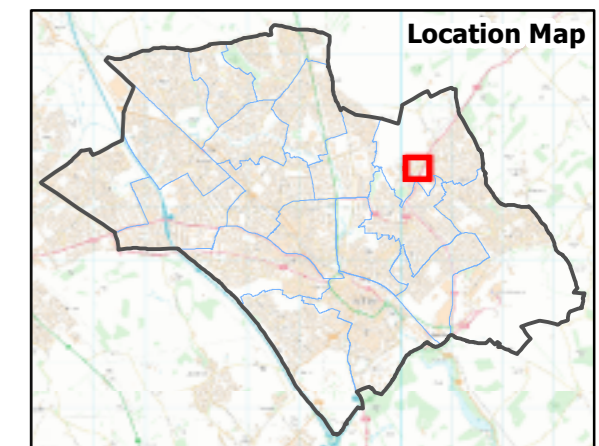


Key

- District centre boundary
- Neighbourhood centre boundary
- Retail frontage as identified by LPA

Goad Classification

- Convenience
- Comparison
- Service
- Unclassified
- Miscellaneous
- Vacant
- Community Facilities



WIGMORE

ADDRESS	Wigmore Lane
DESCRIPTION	Wigmore Park centre is located to the east of the Luton built-up area and consists primarily of a purpose built precinct and car park adjacent to a large Asda supermarket and Petrol Filling Station (PFS), both accessed via Wigmore Lane. The Asda store acts as an anchor store and provides a draw to the rest of the centre. Offices occupy the upper units of the precinct as well as adjacent buildings. Wigmore Primary School is located within close proximity to the centre. The surrounding area is a mix of residential and commercial uses, many associated to Luton Airport which lies nearby to the south.
CURRENT STATUS	District Centre



Asda, Wigmore Lane



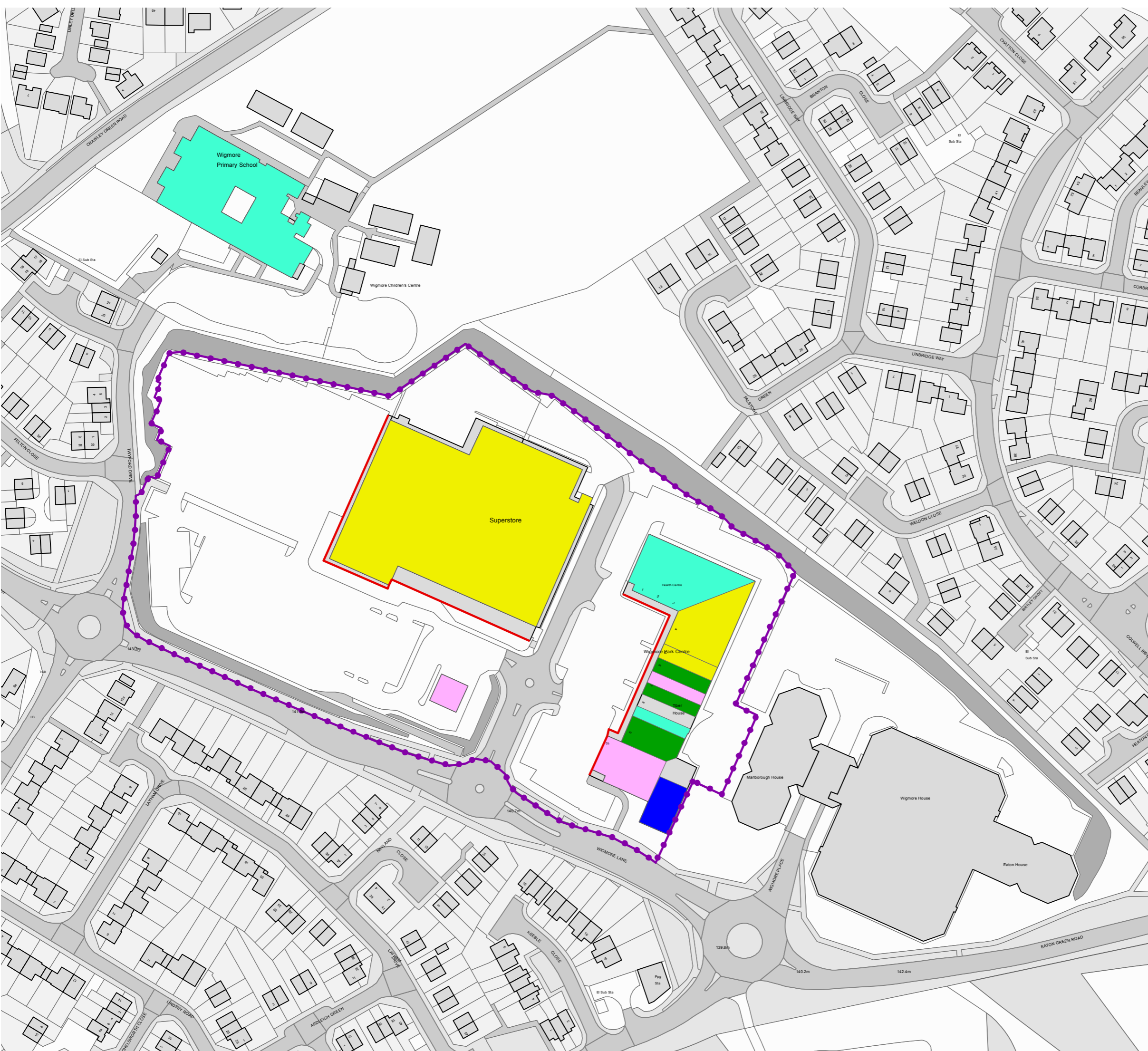
Shopping precinct and car park adjacent Asda

DIVERSITY OF USES	August 2012 No.	January 2015 No.	COMMUNITY FACILITIES	TOTAL : 2
Convenience	3 (50%)	3 (43%)	<ul style="list-style-type: none"> Wigmore Lane Health Clinic Wigmore Dental Clinic 	
Comparison	0 (0%)	0 (0%)		
Service	3 (50%)	3 (43%)		
Miscellaneous	0 (0%)	0 (0%)		
Vacant	0 (0%)	1 (14%)	NATIONAL OPERATORS	TOTAL : 4
Total No. of Uses	6	7	<ul style="list-style-type: none"> ASDA (including petrol filling station) Iceland KFC Coral 	

<p>USES</p>	<p>There has been little change in unit composition at the centre since 2012. While the centre only comprises 7 distinct operators this belies the range and mix available at the centre. The centre is anchored by a large Asda store which includes pharmacy facilities and ATMs. Iceland is also represented with a smaller store within the adjacent shopping parade. These convenience retailers continue to dominate activity at the centre and provide a significant draw with visitors observed linking trips to other units. The centre remains buoyant.</p> <p>Service and community uses are also reasonably well-represented and include takeaway units, fitness centre, surgery and library. Wigmore Primary school also lies adjacent to the centre to the north. However notable absences include a post office, bank/building society and place of worship. The only recorded vacant unit within the centre is the former Wigmore Library which was operational in 2012 but has since closed.</p> <p>The purpose built nature of the parade means it is relatively constrained. Comparison representation continues to be absent from the centre.</p>
<p>PEDESTRIAN FLOWS</p>	<p>The significant draw of the Asda store for carrying out weekly shops results in a high proportion of car-based journeys to the centre. Notwithstanding this, the centre is relatively self-contained and the proximity of the Wigmore primary school and nearby residential area raise levels of footfall throughout the day.</p> <p>A pedestrian crossing at Wigmore Lane facilitates linked trips between the Asda and shopping precinct. Dropped pavements allow for ease of movement for those less physically able. All units are within close proximity of each other which encourages pedestrian movement.</p> <p>Community uses have reduced with the closure of the library but the remainder contribute to activity levels. Community facilities are within easy walking distance of the other centre's uses.</p>
<p>ACCESSIBILITY</p>	<p>The centre is located to the north of London Luton Airport and is primarily accessed by vehicles via Eaton Green Road from the south and Wigmore Lane to the north.</p> <p>The legibility into the centre is good, as signage is located on Wigmore Lane indicating access and encouraging passing trade. Access is mainly by car however the centre is accessible on foot from the residential surroundings.</p>

	<p>The centre continues to benefit from ample parking – the Asda supermarket and the adjacent shopping precinct both have large, dedicated ground level car parks which minimises the potential for on-street parking.</p> <p>Bus stops are located directly adjacent to the centre on Wigmore Lane. Routes provide links to the airport and the town centre. The centre is beyond walking distance of the nearest train station.</p>
<p>PERCEPTION OF SAFETY</p>	<p>As with the August 2012 survey, activity levels and natural surveillance is high. CCTV cameras are apparent over shop entrances and generally throughout the centre the overall perception is safe and pleasant. The Asda store generates high levels of pedestrian activity throughout the centre. In addition, the gym facilities, takeaways, bar and public house ensure that some moderate activity levels are sustained during the evening. While there is little surveillance from surrounding land uses the upper floors of the precinct provide surveillance of the car park. There are no immediately apparent areas of the centre that may be vulnerable to anti-social behaviour.</p>
<p>ENVIRONMENTAL QUALITY</p>	<p>The environmental quality of the centre remains good. The purpose built design of the centre is clearly legible. The visual amenity of the centre could be softened by enhanced landscaping treatments. Notwithstanding this, the centre is clean, free from litter/graffiti and welcoming. All storefronts are generally well maintained and due to its positioning, the vacant library does not detract from the overall shopper environment.</p> <p>Canopied walkways provide protection from adverse weather. Overall, the centre provides a pleasant shopping experience.</p>
<p>CONCLUSION</p>	<p>Wigmore is considered to still be a vital and viable centre with a healthy, varied community function, which supplements a good provision of retail and service uses. A notable change since the 2012 audit is the closure of the local library but remaining community facilities still contribute to activity levels. The Asda store provides a major anchor to the centre and generates significant passing trade. Visitors to the centre make linked trips between the Asda, community and other retail/service uses. Comparison representation is however lacking (notwithstanding Asda’s non-food offer). Car parking provision is ample.</p> <p>Constraints continue to include the lack of some key local services e.g. post office and bank/building societies (Asda does have ATM facilities) which would otherwise enhance the centre’s function. The centre is constrained to some degree by its purpose built nature.</p>

	Overall, the centre remains buoyant and continues to display the majority of the retail/ service and community facilities expected at a healthy district centre.
KEY ISSUES	<ul style="list-style-type: none">• Lacking key service representation e.g. post office and banks/building society.• A replacement community facility in place of the vacant library facility would improve the centre offer.
RECOMMENDED DESIGNATION	District

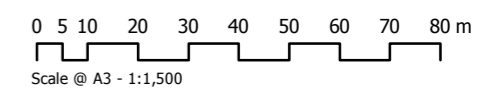
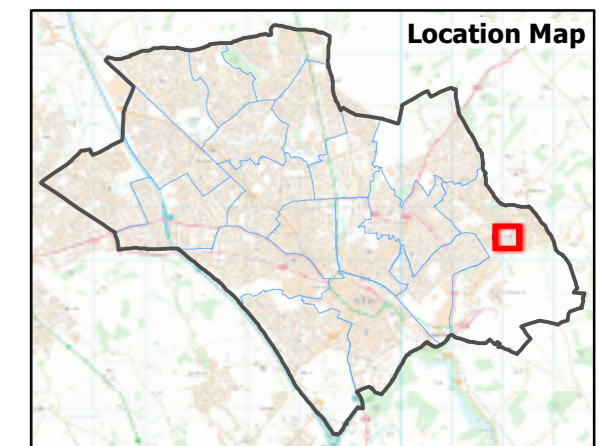


Key

- District centre boundary
- Neighbourhood centre boundary
- Retail frontage as identified by LPA

Goad Classification

- Convenience
- Comparison
- Service
- Unclassified
- Miscellaneous
- Vacant
- Community Facilities



ST DOMINIC'S SQUARE

ADDRESS	Saint Dominic's Square, Tomlinson Avenue
DESCRIPTION	<p>Saint Dominic's Square is a small centre located to the north of the Luton built-up area. The centre is primarily made up of a gated parade of shops consisting of two opposing rows of units fronting a small hard-surfaced courtyard. Ancillary units also include library and Christian Centre which also front Tomlinson Avenue.</p> <p>The main centre is a circa 1960s three storey pitched roof design. The ground floor units are occupied by commercial uses with residential use on the upper floors. The surrounding area is suburban in character and predominantly residential.</p>
CURRENT STATUS	Local



St Dominic's Square shopping courtyard



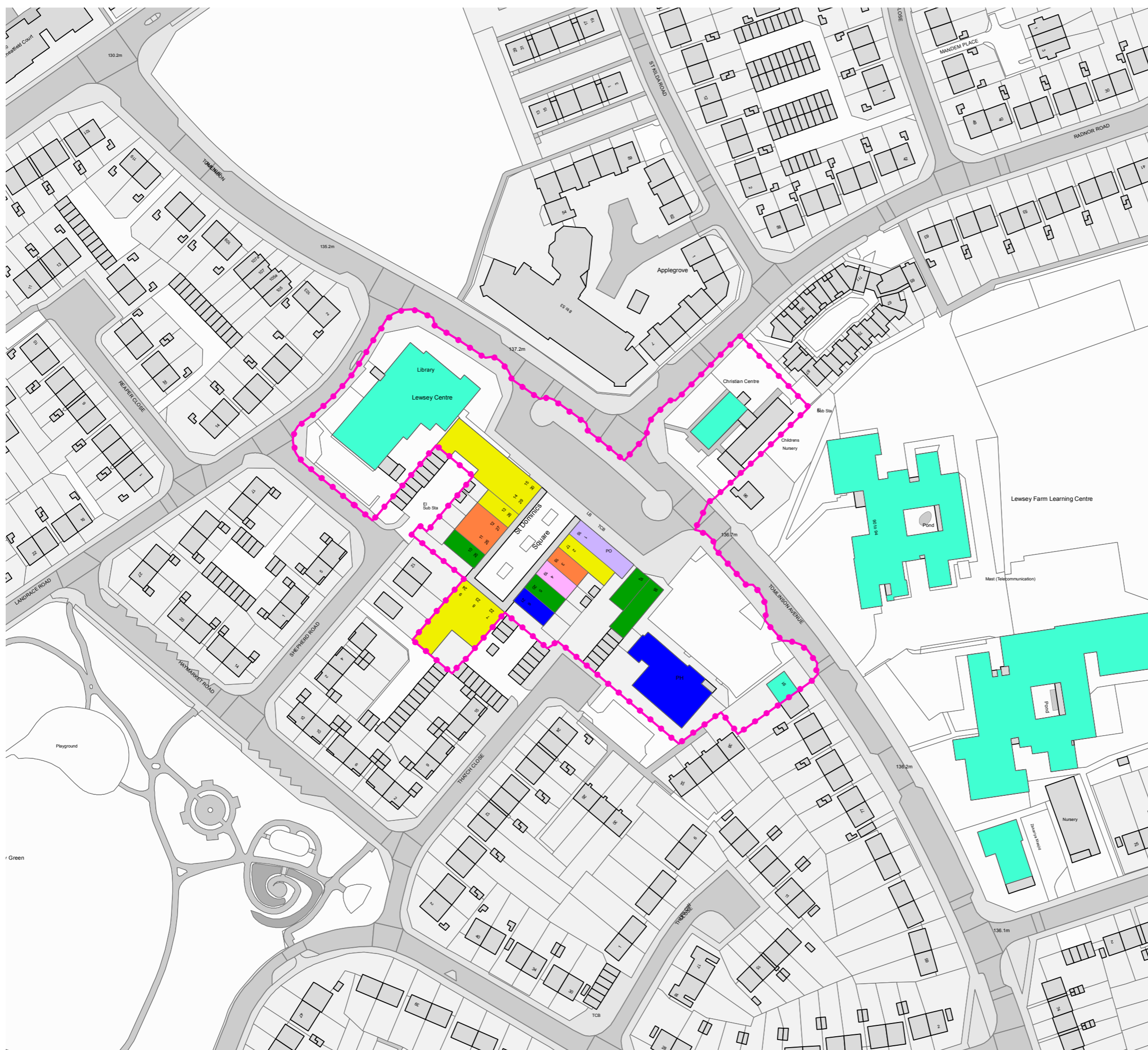
St Dominic's Square Car Park

DIVERSITY OF USES	August 2012 No.	January 2015 No.	COMMUNITY FACILITIES	TOTAL : 6
Convenience	5 (38%)	4(31%)	<ul style="list-style-type: none"> • Lewsey Centre Library • Lewsey Community Centre • Tomlinson Avenue Dentist • Lewsey Christian Centre • Chantry Primary School • Lewsey Farm Learning Centre Trust 	
Comparison	1 (8%)	2 (15%)		
Service	5 (38%)	4(31%)		
Miscellaneous	1 (8%)	1 (8%)	NATIONAL OPERATORS	TOTAL : 3
Vacant	1 (8%)	2 (15%)	<ul style="list-style-type: none"> • Nisa Local • The Cooperative • Ladbrokes 	
Total No. of Uses	13	13		

<p>USES</p>	<p>Saint Dominic’s Square is a small, self-contained centre which consists of approximately 13 units. There has been little change to the composition of uses at the centre since 2012, save for a small increase in the vacancy rate. The centre maintains a good complement of convenience units, and service units. The centre is anchored by a Nisa Local convenience store which is modest but adequately sized for a centre of this limited scale.</p> <p>The centre is supported by community facilities including a library (Lewsey Centre), dentist (The Tomlinson Avenue) and a pharmacy (Smith’s). Recycling facilities located in the car parking area also provide the centre with an added function.</p> <p>In addition Pastures Way Nursery & Children’s’ Centre, Pebbles Pre-School, Martin de Porres Primary School and Lewsey Park swimming pool are also all within reasonable walking distance. Wheatfield Surgery, whilst not forming part of the immediate centre, lies close-by on Wheatfield Road. Lewsey Green, a large open space area with equipped play facilities, lies to the south of the centre within walking distance on Haymarket Road.</p> <p>The Roman Way public house and surrounding car park is vacant and on the market. The boarded-up premises has not been maintained causing a negative impact on the overall environment.</p>
<p>PEDESTRIAN FLOWS</p>	<p>The centre is located within a dense residential setting and benefits from significant walk-in trade. The pedestrian flows both in the pedestrianized courtyard and in the surrounding area are reasonable. The inward-facing parade of shops is sheltered, self-contained and easy to navigate.</p> <p>The small nature of the shopping parade which served by dedicated parking means all parts of the centre are within walking distance. The surrounding community facilities are in very close proximity which encourages further pedestrian activity at the centre.</p>
<p>ACCESSIBILITY</p>	<p>Accessibility on foot is good as the centre benefits from its densely residential surroundings. The centre’s suburban location is set apart from the strategic road network meaning it is unlikely to benefit from significant passing trade and the centre serves a more local function in this respect.</p> <p>Car parking at the centre is ample. The shopping parade has a free car park</p>

	<p>adjacent and the pub adjoining the parade also has a large car park.</p> <p>The centre is distinguishable to passing traffic from its residential surroundings by its three storey nature, dedicated parking and adjoining community uses. Road signage and traffic calming ensure slow speeds (20mph) around the centre. The centre lies on an existing bus route on Tomlinson Avenue with bus stops found directly adjacent to the parade of shops. The centre is considered sufficiently accessible for its relatively limited function.</p>
<p>PERCEPTION OF SAFETY</p>	<p>The perception of safety is mixed. The enclosed nature of centre is somewhat imposing and detracts from the visitor experience. The gated entrance to the parade of shops also imparts a general sense of unease when navigating the centre and previous occurrences of anti-social behaviour at this location. CCTV installations are apparent within the shopping parade. The centre appears buoyant during the day and the upper floors overlook the shopping units and provide natural surveillance of these units and the car park.</p>
<p>ENVIRONMENTAL QUALITY</p>	<p>The environmental quality of the centre is generally poor. The central shopping parade is furnished with benches, bins and planters however the overall quality of the public realm is low and detracts from the visitor experience. The enclosed nature of the centre is unwelcoming and dissuades shoppers enjoying shaded courtyard. The three-storey nature inhibits natural light from furnishing the ground floor units and courtyard. That stated, the centre is reasonably well maintained, albeit there are instances of littering/ graffiti. The uniformity of the c.1960s era parade of shops and adjacent units and the tired looking public realm give the centre a bland and dated appearance. The centre would benefit from public realm improvements such as resurfacing, street furniture installation, soft landscape to soften the centre’s design and a refurbishment of units. This would enhance its visual amenity and encourage visitor attraction.</p>
<p>CONCLUSION</p>	<p>The centre is small in nature and has a modest offer as a result of its constrained nature and limited passing trade potential. The centre is somewhat isolated and there is a lack of opportunity for expansion. There has been a notable increase in the vacancy rate at the shopping parade, which for a centre of this modest scale is somewhat concerning. High vacancy negatively impacts the overall attractiveness, vitality and viability of the centre.</p> <p>The centre continues to be served by public transport and dedicated parking. Perception of safety is mixed and the centre’s gated nature is unwelcoming. The centre’s environmental quality remains poor. Investment in the public realm could provide a more welcoming visitor experience, encourage pedestrian activity and</p>

	<p>help counteract the high vacancy rate.</p> <p>Given the small scale of the centre; its isolated, predominantly residential surrounds (little passing trade); the limited scope for expansion and lack of a critical mass of retail uses (which act as a primary driver of visits) the centre is not a viable district centre.</p> <p>Notwithstanding this, the centre has a reasonable mix of important local uses including community facilities and is considered able to fulfil the role of an neighbourhood centre in part due to its strong complement of community uses. Investment in the centre’s environmental quality may help encourage visits and in turn attract occupants for the centre’s vacant units.</p>
KEY ISSUES	<ul style="list-style-type: none"> • Unwelcoming, gated shopping environment • Poor perception of safety • Lack of investment in public realm
RECOMMENDED DESIGNATION	Neighbourhood

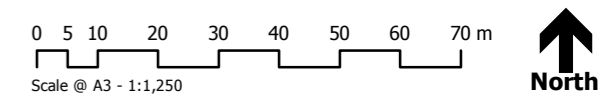
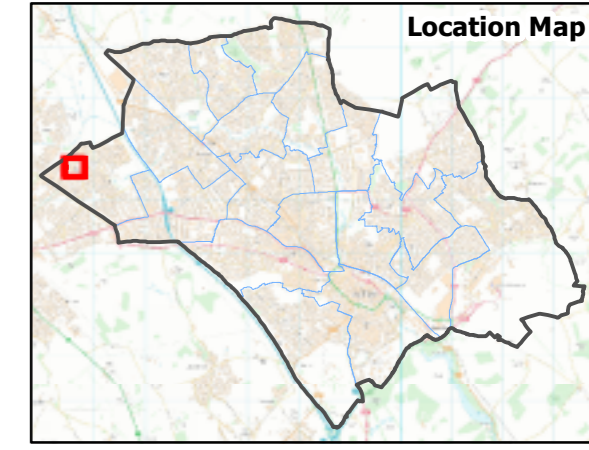


Key

- District centre boundary
- Neighbourhood centre boundary
- Retail frontage as identified by LPA

Goad Classification

- Convenience
- Comparison
- Service
- Unclassified
- Miscellaneous
- Vacant
- Community Facilities



BISCOT ROAD / BLENHAM CRESCENT

ADDRESS	Biscot Road/Bleinham Crescent
DESCRIPTION	The centre is focussed on the Biscot Road /Bleinham Crescent junction to the north-west of Luton Town Centre within the area of Biscot. The centre is a traditional linear centre, consisting primarily of two-storey terraced properties with ground floor commercial uses and residential/storage uses on the first floor. The centre is dispersed across a wide area, with the frontage of commercial units sporadic. Many units are not contiguous and 'interrupted' by residential properties.
CURRENT STATUS	Local



View looking south along Biscot Road



View looking north along Biscot Road

DIVERSITY OF USES	August 2012 No.	January 2015 No.	COMMUNITY FACILITIES	TOTAL: 6
Convenience	8 (28%)	7 (24%)	<ul style="list-style-type: none"> Bleinham Medical Centre Companions Day Nursery Denbigh High Secondary School Saint Andrews Church Saint Andrews Community Hall 	
Comparison	8 (28%)	10 (34%)		
Service	7 (25%)	10 (34%)		
Miscellaneous	1 (4%)	1 (4%)		
Vacant	4 (14%)	1 (4%)		
Total No. of Uses	28	29	NATIONAL OPERATORS	TOTAL:1
			<ul style="list-style-type: none"> Co-operative 	

<p>USES</p>	<p>The centre comprises approximately 29 commercial units in total. These are a good mix of convenience, comparison and service units. The main anchor store is the Cooperative supermarket. Most units are independent and include; Biscot Road Newsagents and Post Office, Emman Foods and Family Choice.</p> <p>Services are well represented in number but mostly consist of hairdressers and takeaways. Banks/ building societies are not represented. Other facilities such as ATMs and a recycling area are present. Vacant units in the centre have reduced by 3 units since 2012, with new traders opening including SuperCutz and Snack Box.</p> <p>Bury Park District Centre to the south is a far larger, more diverse centre and the centre's proximity to Bury Park limits its ability to draw significant levels of trade in the face of this competition within the locality.</p>
<p>PEDESTRIAN FLOWS</p>	<p>Biscot Road is a busy, relatively wide road and the centre falls across a number of street junctions with Biscot Road, which inhibits pedestrian movement. This exacerbates the disjointed and dispersed nature of the commercial frontage and further dissuades pedestrians from visiting the centre's extremities.</p> <p>Pedestrian flows observed at the centre continue to be reasonably buoyant in spite of the difficulties navigating the centre on foot. This may partly be attributed to the associated community uses. Footfall tends to peak around the Cooperative store which acts as an anchor and the adjacent bus stops located on Biscot Road.</p> <p>There are no pedestrian crossing points at the core of the centre and footways are narrow. This continues to make movement on foot less appealing for those less physically able e.g. elderly and parents with pushchairs etc.</p>
<p>ACCESSIBILITY</p>	<p>Biscot Road is a busy route and so the centre has the potential to benefit from significant passing trade, albeit this is likely to be mostly drawn to Bury Park centre to the south. Traffic calming is in place along the road to help reduce traffic speeds, however vehicular traffic still dominates.</p> <p>Parking consists primarily of the Cooperative car park which is sufficient for a store of its size. This is supplemented by on street parking, however there are no designated on-street parking bays. Unlawful parking (on double-yellow lines) was observed during site visits as was the case in 2012 and 2015.</p> <p>Biscot Road is located on a primary bus route into the town centre with a bus stop</p>

	<p>directly adjacent to the Cooperative store. Bus stops at the centre appear to have been recently upgraded with digital time tables providing service information.</p>
<p>PERCEPTION OF SAFETY</p>	<p>The high number and proximity of residential units in the centre means that generally, the centre benefits from good natural surveillance. There is no obvious public CCTV in operation.</p> <p>Overall, while the centre is perceived to be reasonably safe the lack of CCTV and general rundown appearance suggest the centre has high potential for low-level anti-social behaviour such as unlawful parking, littering and graffiti/ vandalism. Telephone boxes located outside the Cooperative have been vandalised.</p> <p>The perception of safety remains mixed.</p>
<p>ENVIRONMENTAL QUALITY</p>	<p>The environmental quality of the centre could be improved. The centre continues to appear from a general lack of investment. While Biscot Road is tree-lined, the pedestrian footways are in need of maintenance and would benefit from resurfacing. Noticeable levels of litter remain as was observed in 2012 and many units are poorly maintained and unwelcoming. The centre has an untidy appearance overall. Footway widening, soft landscaping and the installation of pedestrian crossings and improved street furniture would all be welcome improvements.</p>
<p>CONCLUSION</p>	<p>There has been little change at the centre since 2012, apart from a notable reduction in vacant units which is encouraging, especially given the competition the centre faces from Bury Park to the south. The sporadic nature of the centre remains due to the disparate commercial frontage interspersed with residential properties. Despite being anchored by a good sized convenience store the centre still lacks some key local services including a post office, bank/building society, restaurants and library etc. However there remains a good complement of community facilities to supplement the retail offer.</p> <p>The centre is poorly maintained. Increased investment in the public realm may help improve the shopping environment which in turn should increase pedestrian/ visitor activity and improve the prospects for private investment and a proliferation of uses. However, the centre is relatively physically constrained (for expansion) by the adjacent residential. Infilling of units to make a more coherent centre would be preferential to any extension.</p> <p>The centre's community uses are not overtly legible from the retail facilities despite being within walking distance and the disparate feel of the centre may dissuade</p>

	<p>pedestrian activity. Legibility and navigation could be improved through signposting.</p> <p>There remains the potential to continue to serve day to day retail/ service and community needs at what is a densely populated location within the borough. The vitality and viability of the centre is considered to be improved since 2012, not least helped by a notable reduction of vacancies. Efforts should continue to consolidate and introduce key services at the centre, together with investment in the public realm to improve the retail environment and attract greater visitor numbers. It is considered the centre has improved potential to serve as a neighbourhood centre.</p>
<p>KEY ISSUES</p>	<ul style="list-style-type: none"> • Disjointed nature • Limited scope for expansion – terraced residential setting • Lack of legibility of community uses • Poor public realm • Poor parking facilities • Proximity of Bury Park • Lack of pedestrian crossings
<p>RECOMMENDED DESIGNATION</p>	<p>Neighbourhood</p>

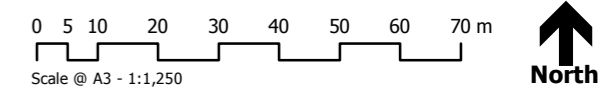
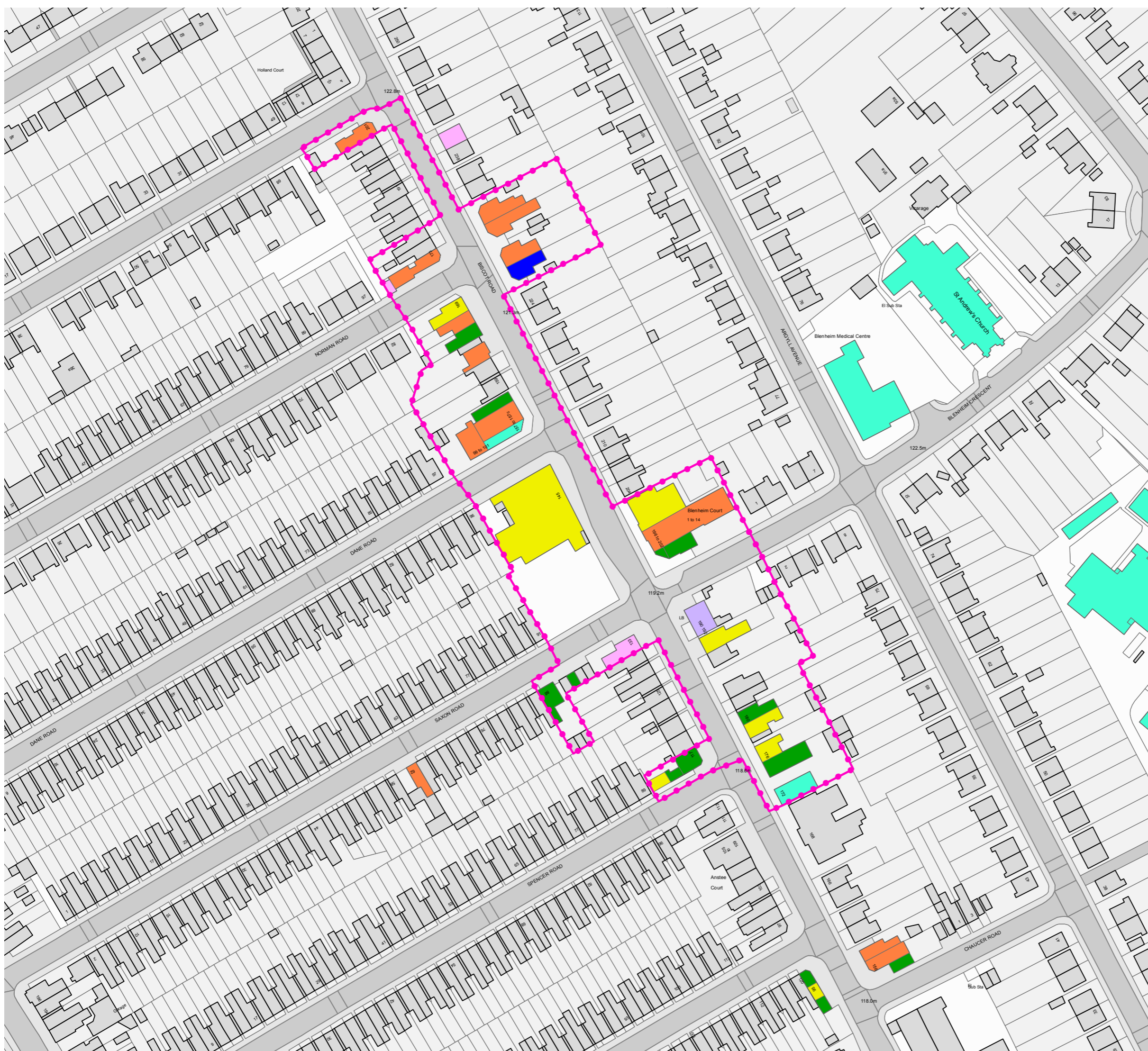
**Biscot Road /
Blenheim Crescent**

Key

- District centre boundary
- Neighbourhood centre boundary
- Retail frontage as identified by LPA

Goat Classification

- Convenience
- Comparison
- Service
- Unclassified
- Miscellaneous
- Vacant
- Community Facilities



CALVERTON ROAD

ADDRESS	Calverton Road
DESCRIPTION	<p>Calverton Road is small centre located at the north of the Borough. The surrounding area is suburban in nature. The centre is focussed around a modest 1960s shopping parade located at the junction of Watermead Road and Calverton Road.</p> <p>The shopping parade is a three-storey flat roofed construction with residences at first and second floor level. Shops front a large car park and recycling facility adjacent.</p> <p>The centre is set within a densely residential setting and abuts The Meads Primary School to the north.</p>
CURRENT STATUS	Local Centre



Freeman Avenue Shopping Parade and car park

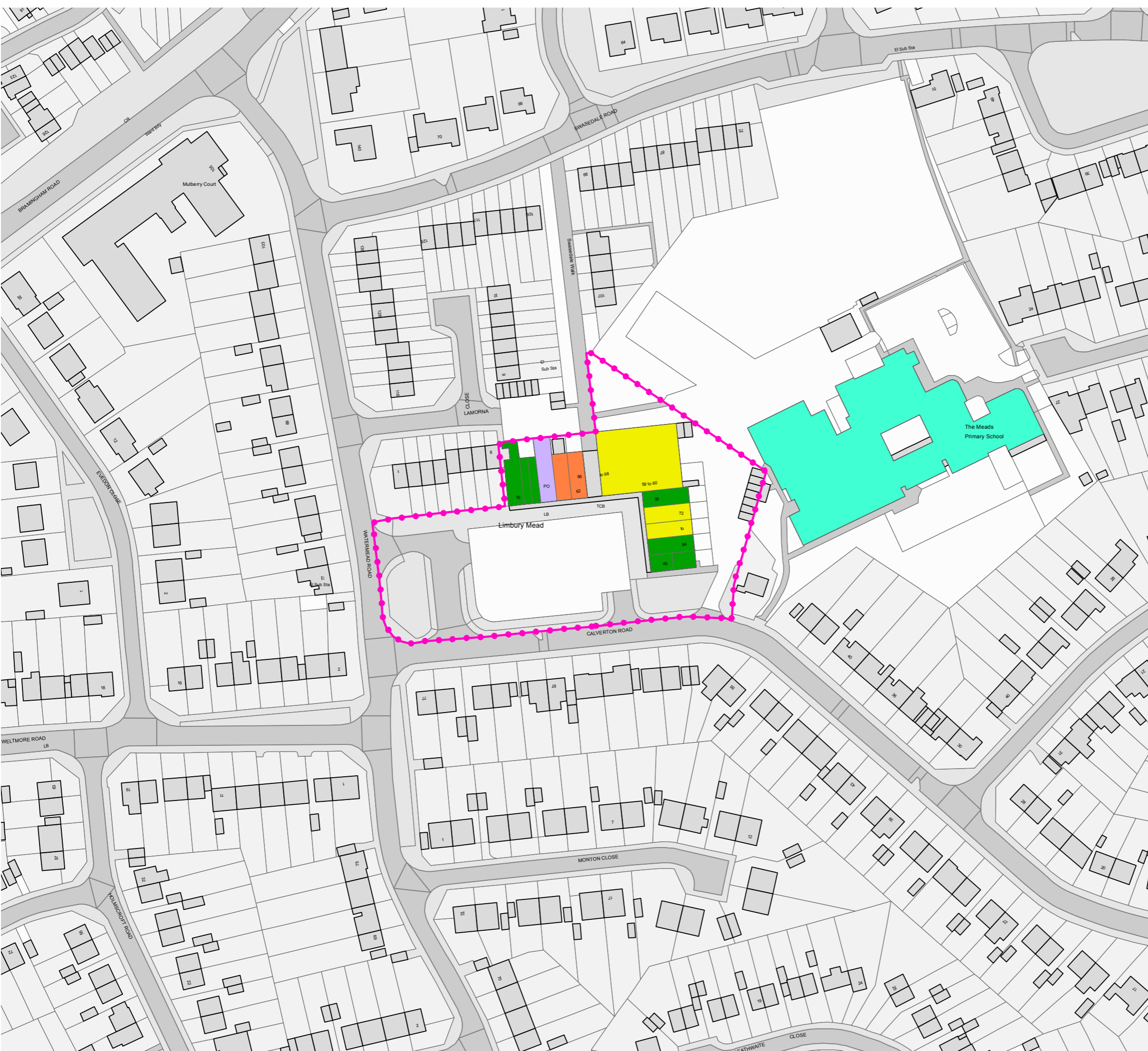


Commercial frontage at shopping parade

DIVERSITY OF USES	August 2012 No.	January 2015 No.	COMMUNITY FACILITIES	TOTAL : 1
Convenience	3 (23%)	3 (23%)	<ul style="list-style-type: none"> The Meads Primary School (backs onto retail parade) 	
Comparison	2 (16%)	2 (16%)		
Service	7 (54%)	7 (54%)		
Miscellaneous	1 (8%)	1 (8%)		
Vacant	0 (0%)	0 (0%)		
Total No. of Uses	13	13	NATIONAL OPERATORS	TOTAL: 1
			<ul style="list-style-type: none"> Tesco Express 	

<p>USES</p>	<p>There has been no change to the retail composition of the centre since the 2012 audit. The centre consists of 13 distinct units. Despite its modest size these include a limited range but good mix of retail and service uses including a supermarket and independent butchers/grocer.</p> <p>Service units are mostly takeaways. The centre continues to lack some key facilities including banks (and ATM machines) and community uses such as a library, place of worship, community centre, surgery etc. However the centre does have a pharmacy and post office. The centre is also served by a recycling facility.</p> <p>The Meads Primary school lies adjacent to the centre to the north. The proximity of the school continues to contribute significant pedestrian footfall during the week and potential passing trade as parents and schoolchildren take advantage of the parade's proximity.</p>
<p>PEDESTRIAN FLOWS</p>	<p>The centre is located within a dense residential setting and benefits from significant walk-in trade. The small, self contained nature of the centre means all units are in close proximity of each other. The inward-facing parade of shops is easy to navigate and front a paved walkway beyond the car park. The centre is small and all areas of the centre are accessible on foot.</p>
<p>ACCESSIBILITY</p>	<p>The centre is easily accessed by vehicles via Calverton Road and Watermead Road. The approach to the centre along Calverton Road is a designated 20mph limit owing to the residential setting and adjacent school, with traffic calming measures also in force e.g. speed bumps and oncoming vehicle priority signs.</p> <p>Car parking is located directly adjacent to the shops and is easily accessible. The car park appears to be sufficiently sized given the modest nature of the centre, albeit the car park has no designated bays.</p> <p>Limbury Meads bus stop is located directly adjacent to the centre's car park. The centre's small, self-contained nature and good parking provision and bus services ensure good accessibility which helps maintain footfall at the centre, despite its limited offer.</p>
<p>PERCEPTION OF SAFETY</p>	<p>Perception of safety at the centre is reasonable but could be improved. The centre does not appear to benefit from public CCTV surveillance and its general tired appearance may contribute to general unease during the evening which could</p>

	<p>discourage activity at certain periods. Swasedale Walk provides an underpass route from the shopping parade to Swasedale Road to the north, however the underpass remains poorly lit with limited surveillance which is likely to discourage pedestrian movements north. This area also appears to continue to be vulnerable to anti-social activity.</p> <p>Generally, the centre is surrounded by residences on all sides and with further residential units on the first and second floor natural surveillance appears to be high.</p>
<p>ENVIRONMENTAL QUALITY</p>	<p>The environmental quality of the centre remains generally poor, rundown in appearance and is not overly welcoming.</p> <p>The centre is well provided for with bins and is free from litter. Some sporadic graffiti detracts from the overall visual amenity. Improved maintenance of shopping units and a re-surfacing of the car park would help freshen the centre’s appearance.</p> <p>Dwarf shrub planting, visible CCTV apparatus, signs and improved external lighting would encourage greater activity throughout the day/evening. Increased private and public investment in the appearance of the centre would likely to enhance visitor attraction.</p>
<p>CONCLUSION</p>	<p>There has been no change in the centre composition since 2012. Despite the mainly physical shortcomings with the centre there are no vacant units. Significant numbers of visitors were observed during the day and the centre appears buoyant.</p> <p>Notwithstanding its apparent activity levels the centre continues to lack some key services and community facilities.</p> <p>The centre’s vitality ensures it is well placed to perform a neighbourhood centre function. This would be significantly enhanced by public realm investment and improved environmental quality.</p>
<p>KEY ISSUES</p>	<ul style="list-style-type: none"> • Limited retail function • Lack of scope for physical expansion • Poor environmental quality • Limited community function
<p>RECOMMENDED DESIGNATION</p>	<p>Neighbourhood</p>

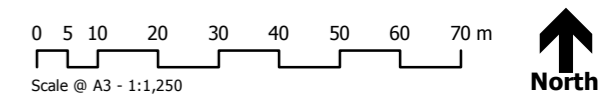
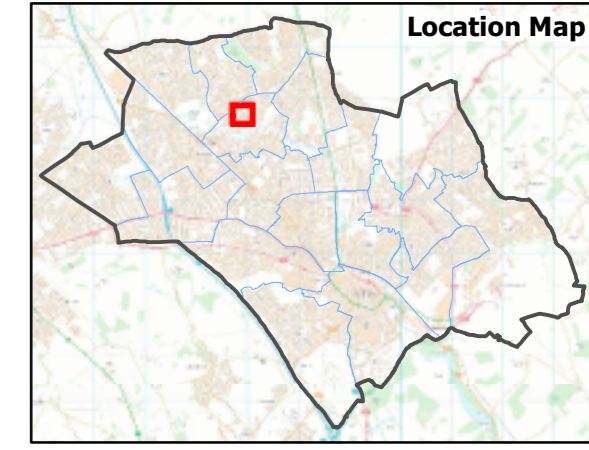


Key

- District centre boundary
- Neighbourhood centre boundary
- Retail frontage as identified by LPA

Goad Classification

- Convenience
- Comparison
- Service
- Unclassified
- Miscellaneous
- Vacant
- Community Facilities



FREEMAN AVENUE, BRAMINGHAM

ADDRESS	Freeman Avenue
DESCRIPTION	<p>A small centre located in the north of the Borough accessed from Freeman Avenue. The centre lies directly adjacent to Bramingham Park Sainsbury's supermarket.</p> <p>The centre is a two storey construction fronting onto a dedicated car park with community units adjacent. The centre lies amongst predominantly residential surroundings.</p>
CURRENT STATUS	Local Centre



Freeman Avenue shopping parade



Freeman Avenue Centre car park

DIVERSITY OF USES	August 2012 No.	January 2015 No.	COMMUNITY FACILITIES	Total : 4
Convenience	1 (25%)	1 (25%)	<ul style="list-style-type: none"> Bramingham Primary School Bramingham Dental Surgery Bramingham Park Church & Community Centre Bramingham Park Medical Centre 	
Comparison	1 (25%)	1 (25%)		
Service	2 (50%)	2 (50%)		
Miscellaneous	0	0		
Vacant	0	0		
Total No. of Uses	4	4	NATIONAL OPERATORS	TOTAL : 1
			<ul style="list-style-type: none"> Lloyds Pharmacy 	

<p>USES</p>	<p>This small centre currently has a very limited retail and service offer and consists of approximately 4 units. There has been no change to the centre composition since the 2012 audit. The centre is well served by a good range of community uses and benefits from its proximity to a Sainsbury's supermarket at Bramingham Park.</p> <p>Uses include a pharmacy, dental practice, fish and chip shop and newsagent and estate agent. There are no vacant units.</p> <p>The centre is not served by a post office.</p>
<p>PEDESTRIAN FLOWS</p>	<p>The centre is located within a dense residential setting and should benefit from significant walk-in trade. The small, self contained nature of the centre means all units are in close proximity of each other. The modest parade of shops is easy to navigate however the large car park mean traffic movements dominate. Despite this all areas of the centre are accessible on foot.</p> <p>A number of pedestrians are observed to link trips to the adjacent Sainsbury's store.</p>
<p>ACCESSIBILITY</p>	<p>The centre is easily accessed by vehicles via Freeman Avenue. The car park is relatively large for a centre of its size and is located directly adjacent to the units.</p> <p>The centre is served by bus stops lying opposite on Whitehorse Vale Road which are within easy reach on foot. The centre's small, self-contained nature, good parking provision and bus services ensure good accessibility which helps maintain footfall at the centre, despite its limited offer.</p>
<p>PERCEPTION OF SAFETY</p>	<p>The centre is generally perceived to be safe. The centre does not benefit from visible CCTV surveillance but it is tidy and welcoming. The centre's limited offer discourages evening activity, albeit the pub is likely to attract evening visitors.</p> <p>Potential natural surveillance is low as the centre is not overlooked by residences to any notable degree. The Sainsbury's PFS is a busy destination which generates activity for much of the day and overlooks the centre to the north to some extent.</p>
<p>ENVIRONMENTAL QUALITY</p>	<p>The environmental quality of the centre is reasonable. The centre is tidy, free from litter/graffiti, well maintained and welcoming. This could be improved by public realm enhancements such as resurfacing to provide greater emphasis to pedestrian movements.</p>

<p>CONCLUSION</p>	<p>There has been no change to the centre’s composition since 2012. The centre continues to have a limited retail/service offer but despite this appears relatively buoyant, owing partly to the good mix of community facilities present. The lack of vacant units suggests a constrained centre with little investment opportunity. The centre represents a good focus for servicing day to day needs but its constrained nature means it addresses only the most local retail/service function. The trade draw provided by the Sainsbury’s supermarket is considered to benefit the centre’s general buoyancy, although as was the case in 2012 limited evidence of linked trips on foot between the facilities were observed.</p> <p>The centre’s main shortcomings remain the limited choice of retail/service units. A neighbourhood designation is considered appropriate as it reflects the importance of the centre’s community function and may encourage investment, albeit the centre is constrained. The large car park may provide a development opportunity in this regard.</p> <p>The centre is considered to remain vital and viable in serving a retail/service and community function.</p>
<p>KEY ISSUES</p>	<ul style="list-style-type: none"> • Constrained centre • Very limited retail/service offer • Over reliance on community function draw and Sainsbury’s at Bramingham Park
<p>RECOMMENDED DESIGNATION</p>	<p>Neighbourhood</p>

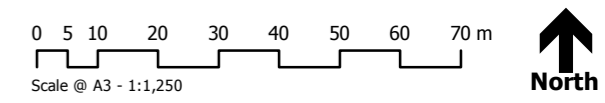
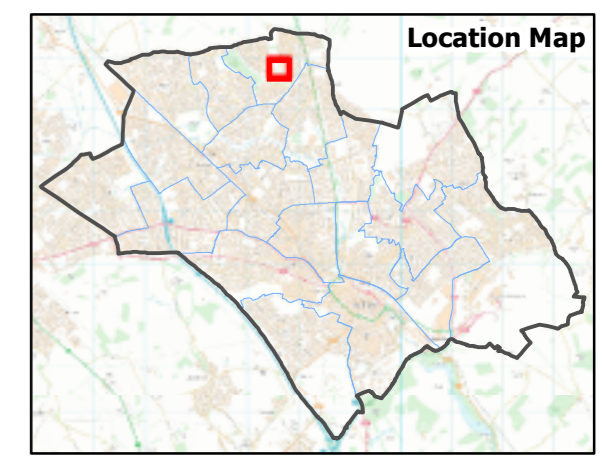


Key

- District centre boundary
- Neighbourhood centre boundary
- Retail frontage as identified by LPA

Goad Classification

- Convenience
- Comparison
- Service
- Unclassified
- Miscellaneous
- Vacant
- Community Facilities



BUSHMEAD (HANCOCK DRIVE)

ADDRESS	Hancock Drive, Bushmead
DESCRIPTION	The centre is a modest purpose-built centre set amongst a large residential estate in the Bushmead area of Luton, at north of the Borough. The centre comprises a predominantly two storey, hipped roof brick shopping parade centred on a dedicated car park in a crescent shaped layout. The centre sits adjacent to Bushmead Court, a two/three-storey residential complex. The surrounding area is distinctly suburban in character.
CURRENT STATUS	Local Centre



Hancock Drive Shopping Parade

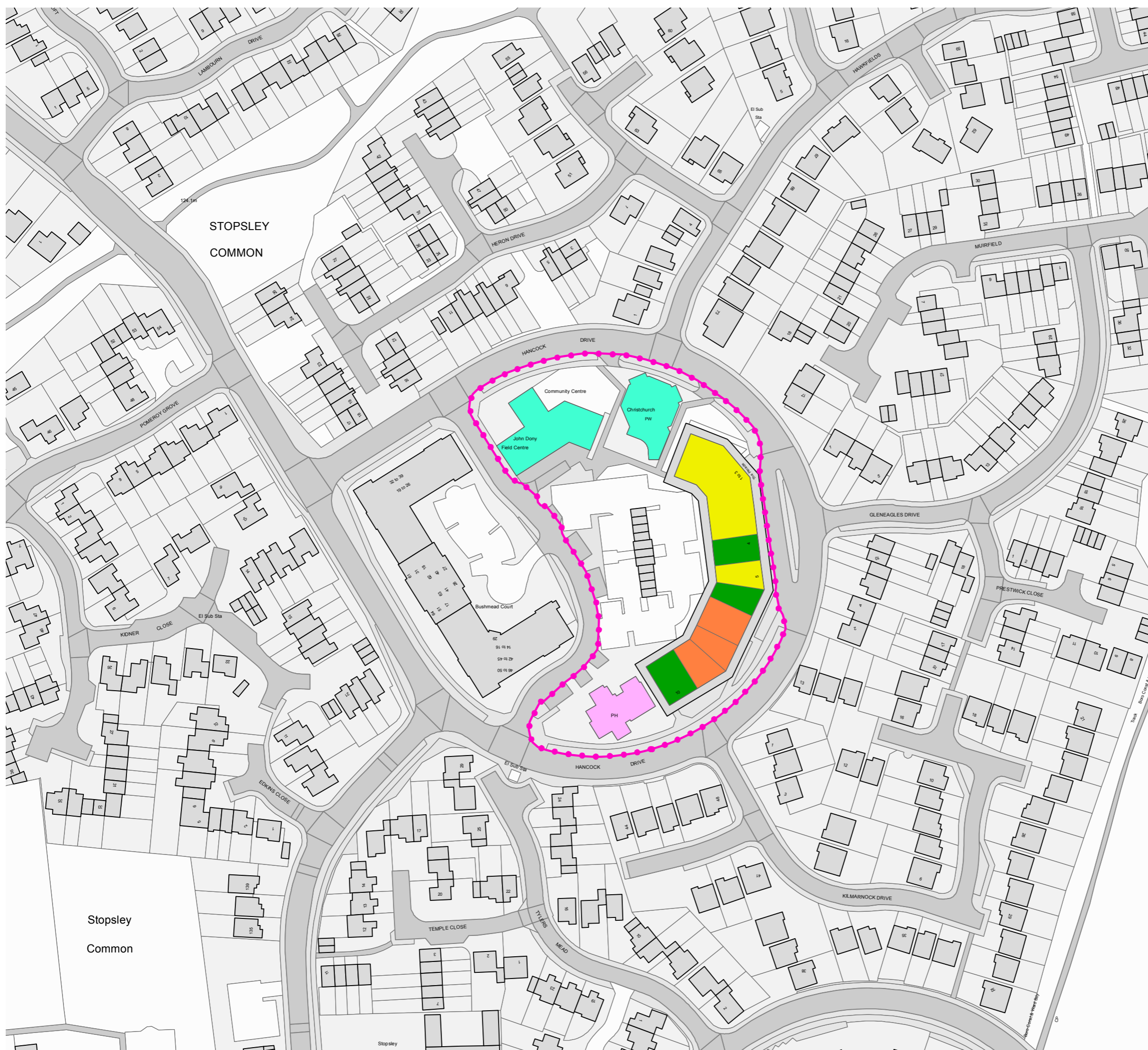


Christchurch Church

DIVERSITY OF USES	August 2012 No.	January 2015 No.	COMMUNITY FACILITIES	TOTAL: 2
Convenience	2 (22%)	2 (22%)	<ul style="list-style-type: none"> John Dony Field Community Centre Christchurch Church 	
Comparison	2 (22%)	3 (33%)		
Service	4 (44%)	4 (44%)		
Miscellaneous	0 (0%)	0 (0%)		
Vacant	1 (11%)	0 (0%)	NATIONAL OPERATORS	TOTAL: 1
Total No. of Uses	9	9	<ul style="list-style-type: none"> The Co-operative 	

<p>USES</p>	<p>The centre has a modest range of units, approximately 9 in total. Despite the limited number of units the centre is anchored by an adequately sized convenience supermarket. Other complementary uses include a chemist and newsagent which also draw notable local trade. Two community uses lie directly adjacent to the shopping parade which gives rise to linked trips between facilities. A former Budgens store is now occupied by a Co-op.</p> <p>Service uses include a hairdressers and pizzeria. The centre is lacking some key services such as a bank and post office which would likely increase footfall. The sole vacant unit identified in 2012 is now reoccupied. Overall activity levels at the centre are good in spite of its limited draw.</p>
<p>PEDESTRIAN FLOWS</p>	<p>The centre is located within a dense residential setting and benefits from significant walk-in trade. The purpose built, self contained nature of the centre means all services/ facilities are in close proximity of each other and accessible on foot. The inward-facing parade of shops is covered and easy to navigate. As with the previous audit in 2012, mid week pedestrian flows were observed to be low but the centre is considered to be buoyed by greater footfall during peak periods (i.e. weekends).</p>
<p>ACCESSIBILITY</p>	<p>The centre is easily accessed by vehicles via Hancock Drive which encircles the centre and is where numerous roads serving the surrounding residential area converge. The centre is relatively inaccessible from the strategic road network which limits its draw. It primarily serves the immediate surrounding area and is unlikely to benefit from passing trade as it is not located on a radial route.</p> <p>Car parking is located directly adjacent to the shops and is highly accessible on foot. The car park appears to be ample for the limited nature of the centre. A row of garages is located at the centre of the car park. Bushmead Court is served by its own residences car park which lies adjacent but separate from the centre's car park.</p> <p>There is potential for additional informal on street parking along the unrestricted Hancock Drive. The centre is served by a bus stop directly on Hancock Drive opposite Gleneagle Drive. The centre's small, self-contained nature and good parking provision and bus service ensure good local accessibility which helps maintain footfall at the centre, despite its relatively limited offer.</p>
<p>PERCEPTION OF SAFETY</p>	<p>The centre is perceived to be a safe environment and benefits from good CCTV coverage which is reassuring for visitors. Natural surveillance is high. Bushmead Court</p>

	directly overlooks the centre, as do many residential properties on Hancock Drive.
ENVIRONMENTAL QUALITY	<p>The quality of the public realm is high. Textured paving is employed throughout the car park to limit emphasis on vehicle movements and slow speeds. The centre is generally tidy, free from litter, welcoming and units are well maintained. The purpose built nature of the centre ensures a uniformity of appearance and street furniture such as refuse bins, dwarf shrub planting and bollards help demarcate pedestrian areas.</p> <p>Ornamental planting would prove a welcome addition to the public realm.</p>
CONCLUSION	<p>There has been little notable change at the centre since 2012, save for a reoccupation of the centre's only vacant unit which is an encouraging indication of buoyancy in spite of the centre's limited modest function. The quality of the public realm is high and the centre remains welcoming. The centre has a good complement of community facilities. The centre is served by public transport and should benefit from significant walk-in trade owing to the residential setting. Its purpose built nature and location within a residential estate, away from the strategic road network means there is little scope to increase its role and function.</p> <p>Overall the centre is still considered sufficiently vital and viable to perform a neighbourhood centre role.</p>
KEY ISSUES	<ul style="list-style-type: none"> • Limited retail/service mix • Limited scope for physical expansion
RECOMMENDED DESIGNATION	Neighbourhood

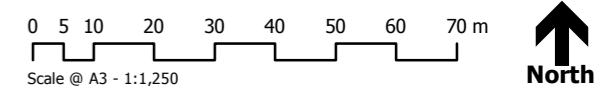
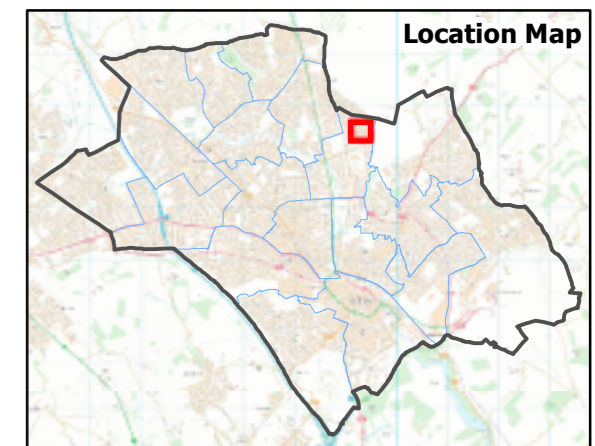


Key

- District centre boundary
- Neighbourhood centre boundary
- Retail frontage as identified by LPA

Goad Classification

- Convenience
- Comparison
- Service
- Unclassified
- Miscellaneous
- Vacant
- Community Facilities



HIGH TOWN

ADDRESS	High Town Road
DESCRIPTION	High Town Centre is located to the north of Luton Town Centre and is primarily set along High Town Road. Other ancillary units and community facilities are located on adjoining roads including Midland Road, York Street and Wenlock Street. The centre is ostensibly made up of two-storey, pitched roof terraced units with commercial uses on the ground floor and residential and/or storage uses on the upper floors. The centre lies immediately to the north of Luton's Central Railway Station.
CURRENT STATUS	District Centre



View north along High Town Road



View south along High Town Road

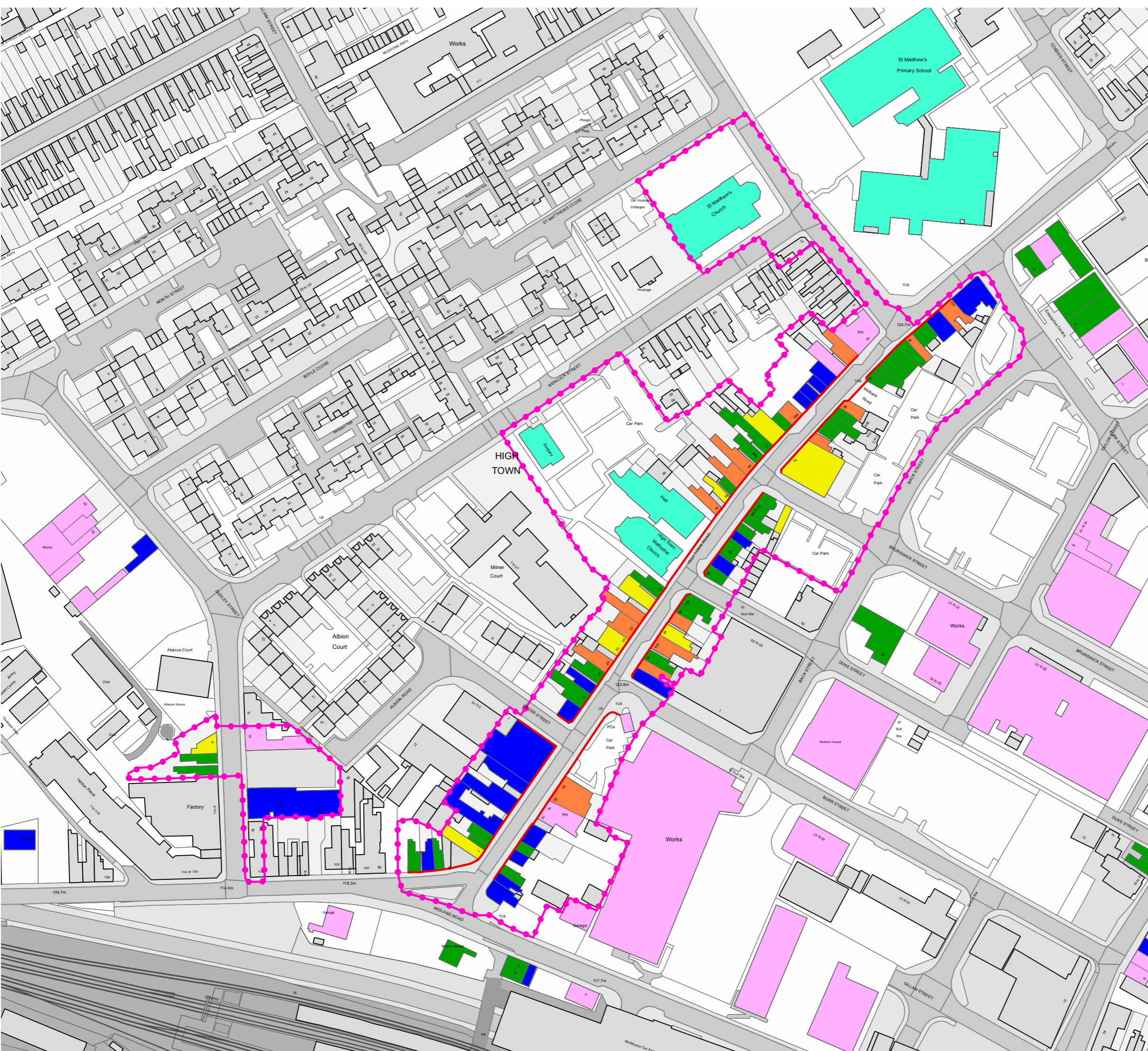
DIVERSITY OF USES	August 2012 No.	January 2015 No.	COMMUNITY FACILITIES	TOTAL : 8
Convenience	12 (16%)	9 (12%)	<ul style="list-style-type: none"> • Saint Matthews Primary School • St Matthews Church • Community Sports and Arts Centre • Welbeck Youth Centre • High Town Surgery • High Town Methodist Church • High Town Hall • Luton Grace Fellowship Church 	
Comparison	19 (26%)	16 (21%)		
Service	41 (56%)	32 (41%)		
Miscellaneous	0 (0%)	0 (0%)		
Vacant	1 (2%)	21 (27%)		
Total No. of Units	73	78	NATIONAL OPERATORS	TOTAL : 2
			<ul style="list-style-type: none"> • Premier (CTN) • Best One • Coral 	

<p>USES</p>	<p>The centre is one of the larger surveyed, currently consisting of approximately 78 units. Convenience, comparison and services are all represented. The centre's current convenience offer is mostly made up of smaller specialist stores including Adam Foods (Butchers), Polskie Delikatesy and SuperSam EU food producers although their combined attraction appears to be limited. A Premier and Best One convenience store are present, but it is considered to lack a notable anchor convenience presence. However, we note since the previous healthcheck (2012) planning permission has been granted for the change of use of 11-15 High Town Road to accommodate a Morrison's Local store (pp ref: 14/01450/COU). If delivered the foodstore will help boost the local convenience offer, generate footfall and may attract further investment into the centre.</p> <p>The centre is predominantly service based including hairdressers, takeaways, bookmakers. While there are many service uses, a high proportion of these are restaurant/take-ways which tend to attract mostly evening based trade and there is a notable absence is the lack of bank/building society representation.</p> <p>WYG note a significant increase in vacancies from the previous health check in 2012, up from 1 to 21 units. WYG also note a large number of units appear to be closed during the day and/or trade at atypical opening hours, which may negatively affect vitality/activity levels at the centre. Clusters of vacant units are located to the north east and south west ends of High Town Road. Notable vacancies include The Freeholder and Railway Tavern pubs.</p> <p>The centre is not served by a post office.</p>
<p>PEDESTRIAN FLOWS</p>	<p>The centre is relatively self-contained; principally set across High Town Road, with some more disparate units found along adjoining roads. On High Town Road the one-way traffic system ensures traffic only approaches from the north making the road easier and safer to navigate on foot.</p> <p>Much of the High Town Road footways are lined with bollards which enhances pedestrian safety, albeit the footways are somewhat narrow which inhibits easy navigation e.g. for those less physically able. No pedestrian crossings are located along High Town Road, although traffic speeds are relatively low. The narrowness of the road and traffic calming measures help keep the speed of the single lane vehicular traffic slow. Further improvements to the pedestrian environment through investment into pavements and pedestrianisation of parts of the centre may help boost activity levels. A pedestrian crossing is located on Midland Road which should encourage</p>

	<p>movement between the centre and the train station to the south.</p> <p>As with the previous healthcheck in 2012, pedestrian flows in the day were observed to be relatively low for a centre of its size. This in part may be explained by the lack of notable convenience and comparison uses at the centre which tend to draw visitors who then characteristically link trips, in addition to the significant and notable amount of vacancies in the centre. The centre may also be more active during the evening owing the dominant service uses at the centre.</p> <p>With respect to pedestrian attraction, despite a substantial surrounding residential population to the north (within walking distance) High Town appears to suffer, at least in part, from the proximity of the town centre to the south. Its town centre's proximity for many makes it a more viable location for shoppers. The railway track forms a physical barrier between centres. Efforts could be made to reduce this perception and encourage to movement to/from the town centre.</p>
<p>ACCESSIBILITY</p>	<p>The narrow one-way traffic system along High Town Road helps prevent traffic congestion.</p> <p>The centre is well catered for in terms of car parking provision with dedicated pay and display parking opportunities within easy walking distance of High Town Road. These include: Brunswick Street, Wentlock Street and Burr Street car parks which offer ample, cheap and convenient parking provision for a centre of its size. Pay and display on-street car parking along High Town Road is available but limited to 30 minutes. A number of designated loading bays service the various retail and service units. Potential exists to utilise excess Council owned public car parks for use as the public open space as a means to improve the overall environmental quality of the centre.</p> <p>A choice of means of public transport is available to access the centre. Luton Station abuts the centre and provides strategic links to London. In addition, a number of bus stops are situated within close proximity of High Town Road.</p> <p>The centre is considered accessible.</p>
<p>PERCEPTION OF SAFETY</p>	<p>The large spike in the vacancy rate since the previous healthcheck has exacerbated poor perceptions of safety at the centre, with clustering of vacant areas and a general lack of street activity. During the day the centre is generally perceived to be safe. The evening environment in particular may be unsettling for visitors and prone to anti social behaviour. No public CCTV installations are apparent along High Town Road</p>

	<p>although shops benefit from some overlooking from the occupied upper floors.</p> <p>Amongst typical retail/service uses the Council should target other uses (such as galleries and arts venues) that will encourage a mix of opening hours throughout the day - spill out activity onto the street may also enhance natural surveillance.</p>
<p>ENVIRONMENTAL QUALITY</p>	<p>Overall the environmental quality is considered to have worsened since the previous healthcheck (2012), mostly as a result of the increased vacancy rate. This has had an adverse effect on street activity and property/street maintenance.</p> <p>There has been notable previous investment in the public realm at the centre, with improvement in shop fronts, street lighting, traffic calming and street furniture aiming to restore the Victorian character of High Town Road. While these improvements have enhanced the streetscene, additional investment is required. Some side streets such as Wellbeck Road are less well maintained. A general untidiness reduces the overall environmental quality of the centre.</p> <p>An opportunity exists to capitalise on the centre’s heritage by incorporating the centre’s key listed buildings such as Methodist Church and The Painters Arms in any refurbishment project.</p> <p>WYG notes production of a High Town Masterplan is underway with a view to deliver new homes, and regenerate the area from its current state of decline by attracting private and public investment. Targeted improvement of the High Street and the public realm, alongside the rationalisation of the shopping frontage is expected to encourage new retailers to the High Town area.</p>
<p>CONCLUSION</p>	<p>High Town centre is considered to represent a key regeneration opportunity.</p> <p>The sharp increase in vacancies at the centre detracts from the centre’s vitality and viability, with large parts of the centre’s periphery now disused. This in turn has a negative effect on the overall environmental quality and perceptions of safety. The poor health of the centre is considered to be at least partly attributable to a lack of anchor stores.</p> <p>In terms of interventions the emerging Master plan intends to look at delivery of housing and regeneration in the area (including the High Street and public realm). This provides an opportunity to rationalise existing retail frontages. It is anticipated that with this intervention greater retail demand will return to the centre which will assist High Town in performing a neighbourhood function.</p>

KEY ISSUES	<ul style="list-style-type: none">• Lack of convenience provision e.g. an anchor supermarket• Lack of daytime activity• Reliance on service uses• Untidy, poorly maintained public realm in some areas• Pedestrian environment
RECOMMENDED DESIGNATION	Neighbourhood

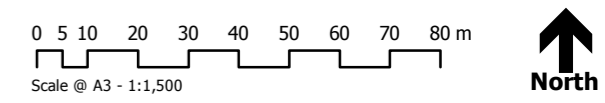
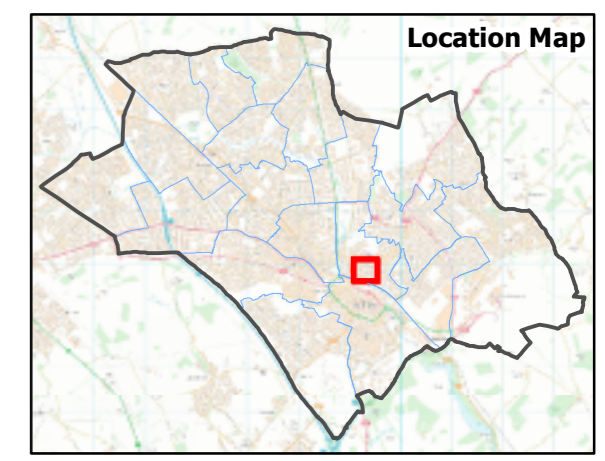


Key

- District centre boundary
- Neighbourhood centre boundary
- Retail frontage as identified by LPA

Goad Classification

- Convenience
- Comparison
- Service
- Unclassified
- Miscellaneous
- Vacant
- Community Facilities



HOCKWELL RING

ADDRESS	Hockwell Ring
DESCRIPTION	Hockwell Ring centre is located to the north-west of Luton Borough near to the M1 motorway (junction 11 located to south). The small centre is focussed around a three-storey pitched roof linear parade of shops fronting onto a small parking/drop-off area, known as The Green Shops. The centre looks out onto public open space, including an equipped play area with other community uses in close proximity including Hockwell Ring Community Centre. The area is predominantly suburban/ residential in character. The centre forms the focus of a 1950/60s council estate planned as part of a post war expansion of Luton.
CURRENT STATUS	Local Centre



Parade of shops at Hockwell Ring Centre

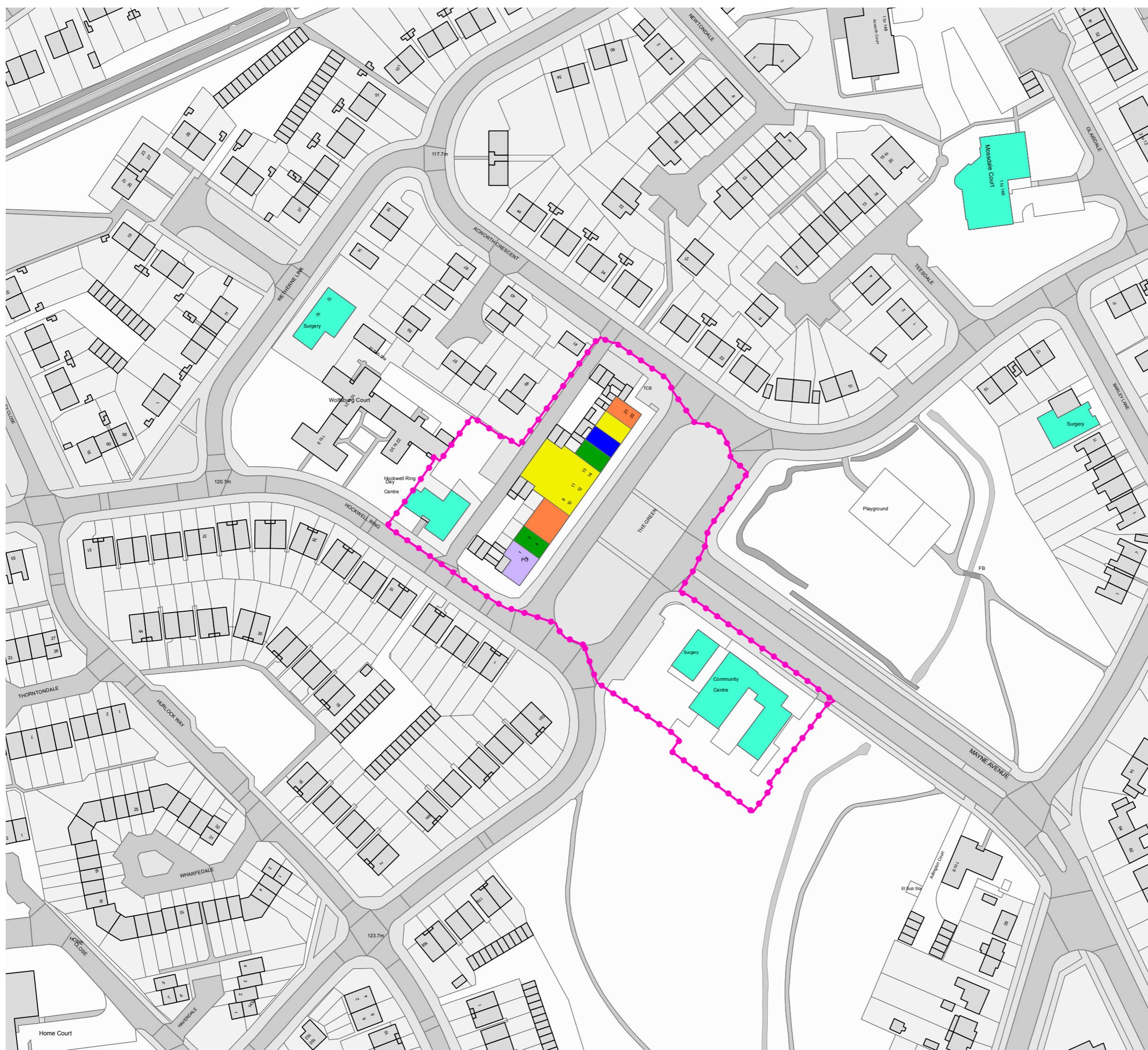


Recycling and Play facilities at Hockwell Ring Centre

DIVERSITY OF USES	August 2012 No.	January 2015 No.	COMMUNITY FACILITIES	Total : 5
Convenience	2 (25%)	2 (25%)	<ul style="list-style-type: none"> Hockwell Ring Day Centre Hockwell Ring Community Centre Hockwell Ring Medical Practice Hockwell Ring Dental Practice The Link Surgery 	
Comparison	1 (12.5%)	2 (25%)		
Service	3 (37.5%)	2 (25%)		
Miscellaneous	1 (12.5%)	1 (12.5%)		
Vacant	1 (12.5%)	1 (12.5%)	NATIONAL OPERATORS	Total : 1
Total No. of Uses	8	8	<ul style="list-style-type: none"> Nisa Local 	

<p>USES</p>	<p>The competition of the centre remains as per 2012. The centre is small and consists of approximately 8 retail/service uses. A number of community facilities lie within close proximity to the shopping parade and enhance the range of facilities. The main convenience unit is a small Nisa Local which serves a distinctly top up function. Units trading at the centre are mostly independents. The parade is also occupied by a butcher, chemist and various takeaways including a fish and chip shop and hot chicken takeaway. A hairdresser is also located at the centre.</p> <p>Community facilities include a community centre, surgery, dentist and day centre. Hockwell Ring Community Centre houses a café, councillors surgery and provides the venue for a number of community groups including adult literacy/ numeracy groups and Ju Jitsu classes. Hockwell Ring Amateur Boxing Club occupies the day centre.</p>
<p>PEDESTRIAN FLOWS</p>	<p>The centre is relatively small and self contained. All retail/service units are contained in the single terraced shopping parade at ground floor level these are easy to navigate on foot. The surrounding community uses are all in relatively close proximity. This means pedestrian flows and activity levels are high and the centre benefits from significant walk in trade. The pedestrian walkway lining the shops is sufficiently wide to allow easy navigation and the distinct paving makes it easily legible from the road/parking area.</p>
<p>ACCESSIBILITY</p>	<p>The centre's distinctly suburban location set away from the wider strategic road network makes the centre accessible to mostly local trade.</p> <p>The three storey nature of the centre distinguishes the parade from its surroundings despite a general uniformity of architecture in the estate. A roundabout/one way system is in place which provides efficient vehicular access to the dedicated parking area. However, this parking area is limited and may be prone to congestion at peak periods.</p> <p>The centre is served by a central bus stop located on Hockwell Ring.</p>
<p>PERCEPTION OF SAFETY</p>	<p>The perception of safety is reasonable. Public CCTV apparatus is apparent and provides reassuring surveillance. There are some indications of minor anti-social activity such as littering/ graffiti however generally the centre is well maintained and there are no obvious areas which appear vulnerable to crime. The upper residential floors at The Green Shops provide good natural surveillance. The</p>

	centre is also overlooked to some extent by residences on the adjoining streets.
ENVIRONMENTAL QUALITY	<p>The centre’s environmental surrounds are spacious in spite of its modest nature, which is typical of the area’s post-war built environment. Despite this, the centre is somewhat dated in design, however it is generally clean, free from litter and welcoming. Improvement to the public realm such as re-surfacing and the provision of street furniture has enhanced the centre’s appearance and visitor attraction.</p> <p>Private units are well generally maintained and vibrant. Overall, the environmental quality is considered to be high.</p>
CONCLUSION	<p>There has been no change to the centre since 2012. It remains buoyant in serving a distinctly day to day top up function. Any centre expansion would require redevelopment of the area surrounding the purpose built precinct which currently provides important open/space landscaped areas.</p> <p>The centre is considered sufficiently accessible with respect to maintaining a local function. The centre is generally perceived as safe, clean and well maintained. Activity levels are observed to be good and helped by the mix of easily accessible community uses. The centre is considered vital and viable in serving a neighbourhood function.</p>
KEY ISSUES	<ul style="list-style-type: none"> • limited retail/service function within the centre. • lack of scope for physical expansion without encroaching onto public open space • limited parking provision
RECOMMENDED DESIGNATION	Neighbourhood

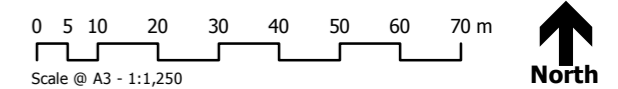
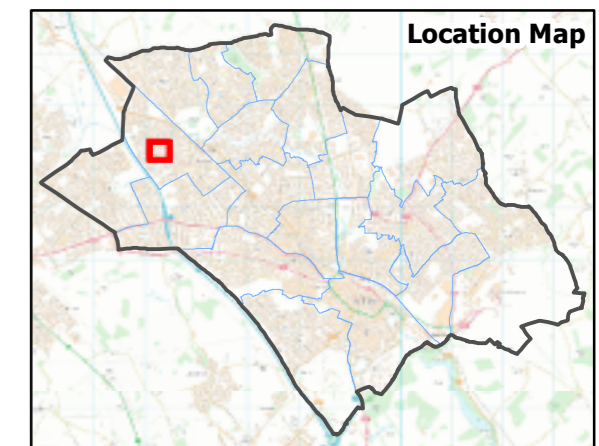


Key

- District centre boundary
- Neighbourhood centre boundary
- Retail frontage as identified by LPA

Goad Classification

- Convenience
- Comparison
- Service
- Unclassified
- Miscellaneous
- Vacant
- Community Facilities



MARKET SQUARE (FARLEY)

ADDRESS	Whipperley Ring
DESCRIPTION	Market Square (Farley) is located to the south-west of the Borough and is set within a suburban 1960s council estate. The purpose built centre is located at the middle of a large roundabout, Whipperley Ring. The centre comprises a shopping precinct with residential units above on two floors, centred around a dedicated car park. Community facilities occupy adjacent units including a community centre and surgery. Whipperley Primary School is situated close to the shopping precinct within the confines of Whipperley Ring.
CURRENT STATUS	Local Centre



View looking north at Farley Centre



View of The Parrot pub and residential units looking east at Farley Centre

DIVERSITY OF USES	August 2012 No.	January 2015 No.	COMMUNITY FACILITIES	TOTAL : 4
Convenience	5 (39%)	5 (39%)	<ul style="list-style-type: none"> Whipperley Infant School Farley Hill Medical Centre Farley Hill Community Centre The Parrot Pub (marketed) 	
Comparison	2 (15%)	2 (15%)		
Service	5 (39%)	5 (39%)		
Miscellaneous	1 (8%)	1 (8%)		
Vacant	0 (0%)	0 (0%)		
Total No. of Units	13	13	NATIONAL OPERATORS	TOTAL : 3
			<ul style="list-style-type: none"> Nisa Local The Cooperative Ladbrokes 	

<p>USES</p>	<p>The small centre continues to offer 13 distinct uses, as observed in the 2012 audit. There has been no change in the centre composition in the intervening period. Uses include convenience, comparison and service units. Two good sized mini-supermarkets continue to occupy abutting units and together anchor the centre. Independent traders include Man’s Newsagents and Farley Food and Wine.</p> <p>Other services represented include a bookmakers (Ladbrokes), cafés/ takeaways, bakery and a pharmacy. The centre is also served by a post office.</p> <p>The centre continues to present no vacant units. Notwithstanding this, the nearby public house is open for business but continues to be actively marketed.</p>
<p>PEDESTRIAN FLOWS</p>	<p>The self contained nature of the centre means it is very easy to navigate on foot. The units all front onto a dedicated car park and a sheltered pedestrian walkway provides access from the car park to the shopfronts. Pedestrian activity was observed to be high during site visits in both 2012 and latterly in recent visits. The conveniently located community facilities nearby draw visitors to the centre for reasons other than purely shopping. The housing estates which provide the centre’s backdrop ensure good potential for walk in trade, alongside the Whipperley Infant Academy.</p> <p>Pedestrian walkways within the centre are wide and this, coupled with textured paving, signage and the dense, high rise surroundings ensure slow vehicular movements. Pedestrians have priority over traffic movements. Bollards help safeguard pedestrian safety are demarcate the parking area.</p>
<p>ACCESSIBILITY</p>	<p>The location of the centre, which forms the focus of a suburban housing estate, means the centre is ‘hidden’ to some extent and does not draw passing trade beyond those living in the locality. Nevertheless, while the centre’s legibility by vehicle is relatively poor i.e. a lack of clear signage, once accessed via Ross Close from Whipperley Ring, it is served by free, legible parking spaces, although these appear to get busy at peak periods e.g. weekends.</p> <p>There are numerous bus stops surrounding the centre on Whipperley Ring, all within easy walking distance.</p> <p>The centre is considered suitably accessible to the locality.</p>
<p>PERCEPTION OF SAFETY</p>	<p>Perception of safety in the centre is reasonable. The central shopping precinct is monitored by CCTV which is reassuring for visitors. Nevertheless, the overbearing</p>

	<p>nature of the high rise precinct building engenders a sense of unease and gives the centre an overall unwelcoming character. However, the centre's built form means there are many blank facades and blind corners which are unappealing to navigate during evening hours. That stated, the centre benefits from high natural surveillance and appears generally well lit.</p> <p>The proximity of the local community centre and public house provides evening activity although these uses may make the centre more vulnerable to anti-social behaviour e.g. vandalism.</p>
<p>ENVIRONMENTAL QUALITY</p>	<p>Overall, the environmental quality in Market Square remains reasonable. Most shops at the shopping precinct are well maintained and inviting however the centre still appears generally untidy and a little rundown in areas. The 1960s built form of the centre, whilst was once modern, is now rather dated and tired looking.</p> <p>Some of the adjacent uses such as the public house are poorly maintained giving the centre a rundown feel. While some public realm features such as soft landscaping areas aim to soften the centre's built form many of these attributes are poorly maintained and lack vibrancy and fail to counteract the overbearing nature of the centre's architecture. The uniformity of the centre gives it a drab appearance. Further public realm enhancements such as brighter planting schemes and improved maintenance of public areas and some private units could help lift the visual amenity of the centre.</p>
<p>CONCLUSION</p>	<p>There has been no change in the centre composition since 2012. The centre is small and located beyond a strategic route, nevertheless still appears well placed to serve a distinctly local day-to-day function. The centre was observed as buoyant. The centre benefits from a good complement of community facilities that draw visitors to the centre for reasons other than purely shopping.</p> <p>Environmental quality remains the centre's main shortcoming. Improved general maintenance and public realm enhancements may soften the imposing nature of the centre help to draw increased numbers and make the visitor experience more pleasant. Despite this, the centre is still well served by community facilities and considered vital and viable in serving a day to day neighbourhood function.</p>
<p>KEY ISSUES</p>	<ul style="list-style-type: none"> • Poor environmental quality • Little scope for physical expansion of retail/services
<p>RECOMMENDED DESIGNATION</p>	<p>Neighbourhood</p>

Luton Retail Study
Refresh

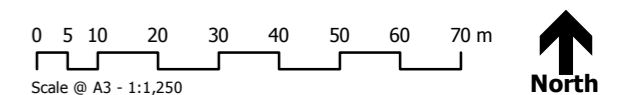
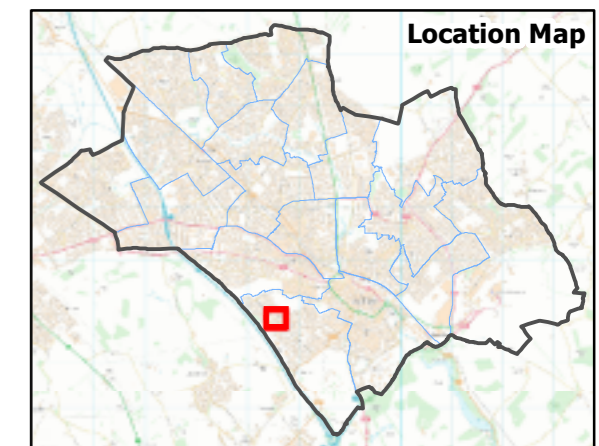
Market Square, Farley 13

Key

- District centre boundary
- Neighbourhood centre boundary
- Retail frontage as identified by LPA

Goat Classification

- Convenience
- Comparison
- Service
- Unclassified
- Miscellaneous
- Vacant
- Community Facilities



A090023_Luton Centre Plans.mxd February 2015

5th Floor, Longcross Court, 47 Newport Road, Cardiff CF24 0AD
 ☎ +44 (0)29 2082 9200 ✉ cardiff@wyg.com 🌐 www.wyg.com

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ROUND GREEN

ADDRESS	Hitchin Road
DESCRIPTION	Round Green centre is a traditional linear centre focussed along Hitchin Road and roundabout situated in the north-east of the Borough. The centre comprises two storey terraced properties with ground floor units fronting Hitchin Road. The surrounding area is distinctly residential in nature. Hitchin Road is a radial route providing access to Stopsley suburban area to the north and the town centre to the south.
CURRENT STATUS	Local Centre



View looking north along Hitchin Road



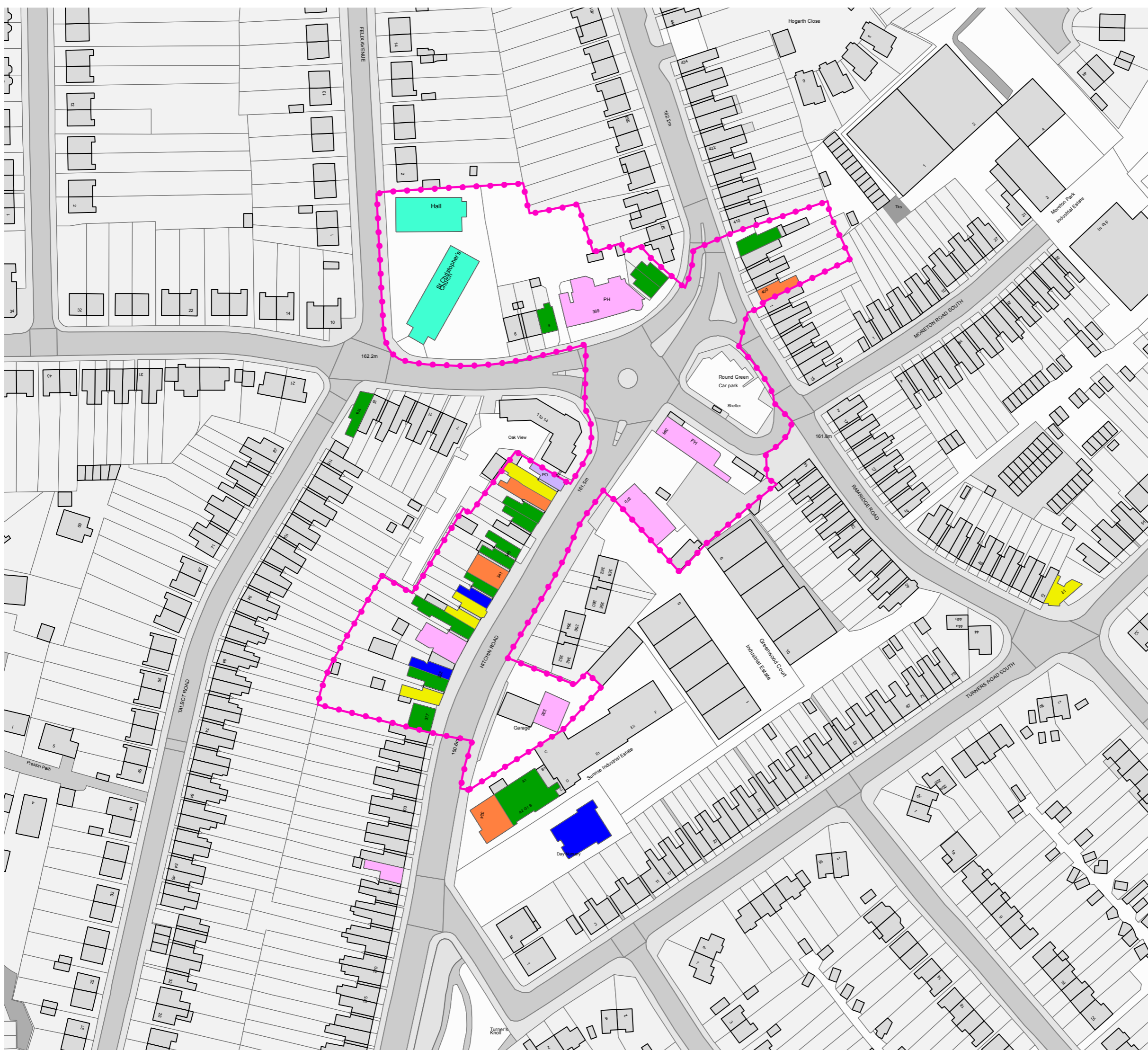
View looking south along Hitchin Road

DIVERSITY OF USES	August 2012 No.	January 2015 No.	COMMUNITY FACILITIES	TOTAL: 3
Convenience	4 (17%)	4 (18%)	<ul style="list-style-type: none"> • Veterinary surgery • St Christopher's Church and Meeting Hall 	
Comparison	3 (13%)	3 (14%)		
Service	11 (48%)	12 (55%)		
Miscellaneous	1 (4%)	1 (5%)	NATIONAL OPERATORS	TOTAL :1
Vacant	4 (17%)	2 (9%)	<ul style="list-style-type: none"> • Ladbrokes 	
Total No. of Uses	23	22		

<p>USES</p>	<p>Round Green centre comprises approximately 22 units which are predominantly independent stores. There has been little change in the unit composition since the 2012 audit although vacancies have reduced. The limited amount and range of units means the centre still primarily caters for top-up retail and service visits. Independent stores include Round Green Fruit and Veg, H Collins Family Butcher and Southern Fried Chicken Takeaway.</p> <p>Service uses dominate and have increased since 2012, occupying over half of the centre's units. These include takeaways, bookmakers and hairdressers. Convenience uses are also comparatively well represented and include a newsagent. The centre is not served by an 'anchor' convenience store e.g. a mini supermarket, however is served by a post office.</p> <p>WYG note the former City Kinder Pre-School lying adjacent to the centre has recently become vacant.</p> <p>Community uses include a church and meeting hall which are located near to the shops.</p>
<p>PEDESTRIAN FLOWS</p>	<p>The centre's relatively limited offer could be a contributing factor to generally low pedestrian flows observed during the day. Similarly to 2012, very modest pedestrian activity levels were observed. Notwithstanding this, the centre is located within a dense residential setting and has the potential to benefit from significant walk-in trade. The small, traditional linear nature of the centre means all units are generally in close proximity of each other making the centre relatively easy to navigate on foot. However the dominance of traffic flows on Hitchin Road and roundabout dissuade from prolonged pedestrian activity at the centre. Hitchin Road and roundabout are busy and cater for a large volume of traffic for most of the day, given its strategic north-south route. Pedestrian crossings help encourage pedestrian flows through the centre.</p> <p>The Jolly Toppers pub and The Round Green Tavern help generate pedestrian activity at the centre during the evening.</p>
<p>ACCESSIBILITY</p>	<p>The centre is located along a radial route and should benefit from passing trade. The centre has good access from the A5228 and is generally congestion free. An MOT garage is found at the heart of the centre on Hitchin Road which also generates traffic movements.</p>

	<p>Car parking facilities are good for a centre of this size. Round Green pay and display car park is located adjacent to Hitchin Road roundabout, next to the centre's main bus stop. A number of on-street short-stay designated parking bays serve the centre allowing for quick-stops to the various units.</p> <p>Given the dominant traffic, further calming measures along Hitchin Road may encourage greater pedestrian movement notwithstanding the existing pedestrian crossings which help slow vehicle speeds.</p> <p>The centre is considered easily accessible by a variety of means of transport.</p>
<p>PERCEPTION OF SAFETY</p>	<p>Visibility and natural surveillance throughout the centre is high. The centre's ground floor commercial units are overlooked and a number of private outdoor seating and spill-out area improve the vitality of the centre adding to the perception of public safety. There are no apparent public CCTV installations in operation. However, there are no obvious areas which may be vulnerable to anti-social activity. Generally the centre is perceived to be safe.</p>
<p>ENVIRONMENTAL QUALITY</p>	<p>The environmental quality of the centre continues to be high. The centre is clean, free from litter/graffiti. Signage is clearly legible and the traditional terraced units which book-end the centre are generally well maintained.</p> <p>No benches or planting are located in the central area which would enhance the visitor experience, however there are bins, a post box and phone boxes.</p>
<p>CONCLUSION</p>	<p>There has been a modest change in the centre composition since 2012. Most notably the number of vacant units has halved which is encouraging. The centre remains well located on a radial route to benefit from passing trade. Although the rather limited retail/service and community offer at the centre means it still does not fully capitalise on its strategic location which is not helped by the continued lack of an anchor retailer. A modest expansion of the retail/service offer may increase its vitality and viability, albeit the centre remains physically constrained in this regard.</p> <p>Public realm improvements such as traffic calming along Hitchin Road may help encourage greater pedestrian activity in the centre and counteract the dominant traffic flows around the busy Hitchin Road roundabout. Nevertheless, the centre has continued potential to serve a neighbourhood centre function.</p>

KEY ISSUES	<ul style="list-style-type: none">• Limited retail function - lack of 'anchor' convenience store• Physically constrained• Dominant vehicular traffic
RECOMMENDED DESIGNATION	Neighbourhood

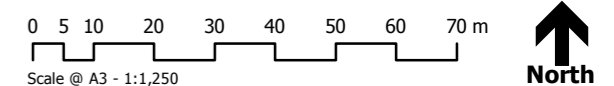
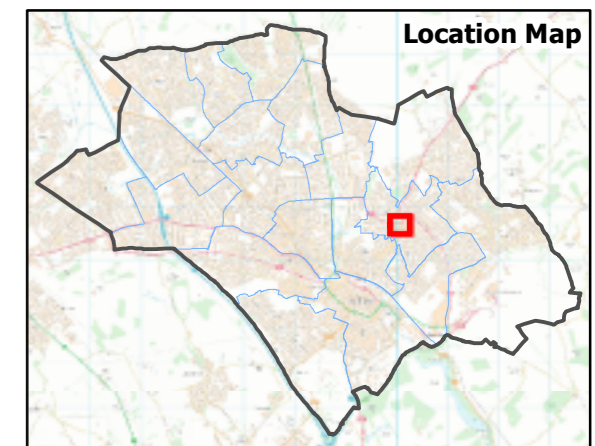


Key

- District centre boundary
- Neighbourhood centre boundary
- Retail frontage as identified by LPA

Goad Classification

- Convenience
- Comparison
- Service
- Unclassified
- Miscellaneous
- Vacant
- Community Facilities



BIRDSFOOT LANE SOUTH

ADDRESS	Birdsfoot Lane
DESCRIPTION	<p>Birdsfoot Road is a small centre located in the north of the borough, comprising a parade of shops served by a parking area located along Birdsfoot Lane. The shopping parade is a three storey, pitched roof brick construction with residential units occupying the first and second floors.</p> <p>The centre is set within a suburban residential setting with community uses nearby including Icknield Primary School; High School and grounds. A County Wildlife Site lies to the east.</p>
CURRENT STATUS	Local



Birdsfoot Lane South parade of shops



Parking adjacent to parade of shops

DIVERSITY OF USES	August 2012 No.	January 2015 No.	COMMUNITY FACILITIES	TOTAL : 4
Convenience	1 (14%)	1 (12.5%)	<ul style="list-style-type: none"> • Gospel Pentecostal Church • Saint Josephs RC Icknield Scouts • Icknield Primary School (outside boundary) • Icknield High School (outside boundary) 	
Comparison	3 (43%)	3 (37.5%)		
Service	3 (43%)	3 (37.5%)		
Miscellaneous	0 (0%)	0 (0%)		
Vacant	0 (0%)	1 (12.5%)		
Total No. of Uses	7	8	NATIONAL OPERATORS	TOTAL: 1
			<ul style="list-style-type: none"> • The Cooperative 	

<p>USES</p>	<p>In terms of scale, the centre is small, comprising 8 commercial units although these are complemented by adjacent community facilities (including a church hall and scouts club). Notwithstanding the modest range of units there is a good mix of convenience, comparison and service uses, albeit some key facilities remain absent e.g. banks and surgery etc. The centre does however benefits from a post office, pharmacy and ATM facilities.</p> <p>The Icknield Primary School and High School lie adjacent to the centre to the south and generate footfall given the centre's proximity.</p>
<p>PEDESTRIAN FLOWS</p>	<p>The dense residential setting ensures the centre benefits from significant walk-in trade potential. The centre's modest scale means it is easy to navigate and wide footways assisting those particularly for those less able.</p>
<p>ACCESSIBILITY</p>	<p>Birdsfoot Lane is a residential route with a 30mph restriction reduced to a 20mph zone adjacent to the Primary school. The numerous schools in the vicinity mean the road is liable to periods of traffic at certain times of the day. Notwithstanding this, the centre is accessible by public transport - a bus stop sits directly adjacent to the parade's Coop store.</p> <p>The centre is served by a dedicated on street parking area fronting the units on Birdsfoot Lane. In addition there is a small informal parking area directly south of the Coop store. Parking appears to be adequate for a centre of its modest size. The centre also benefits from a good provision of cycle parking (Sheffield stands) conveniently located on the footway adjacent to the shops.</p>
<p>PERCEPTION OF SAFETY</p>	<p>The perception of public safety is considered good. There is no public CCTV surveillance apparent, however private CCTV monitors the rear entrance to the Coop store. The centre directly faces residential units on the opposite side of Birdsfoot Lane and Dewsbury Road. This provides high natural surveillance. Furthermore, the adjacent community uses ensure good pedestrian activity and there are no obvious areas of the centre which appear particularly prone to anti social behaviour.</p>
<p>ENVIRONMENTAL QUALITY</p>	<p>The environmental quality is considered good. The centre is generally tidy, free from litter and well maintained. The design of the parade is stark, typical of its era and somewhat tired.</p> <p>The sheltered pedestrian walkway along the front of the parade benefits pedestrians. The centre is furnished with bins and appears well lit. Bollards help demarcate the pedestrian footway from the road/parking area.</p>

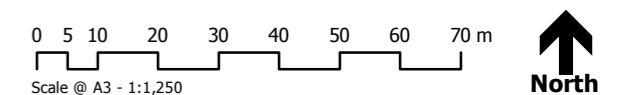
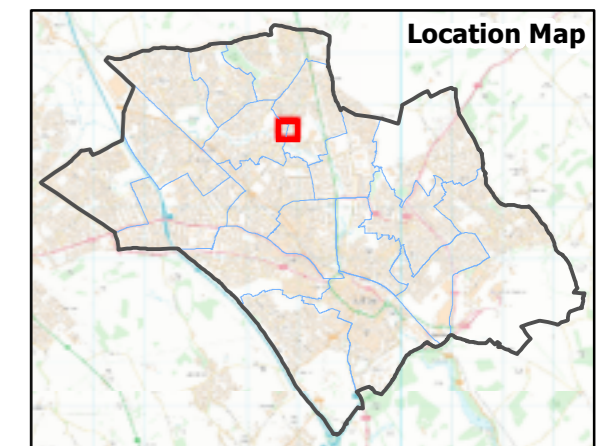
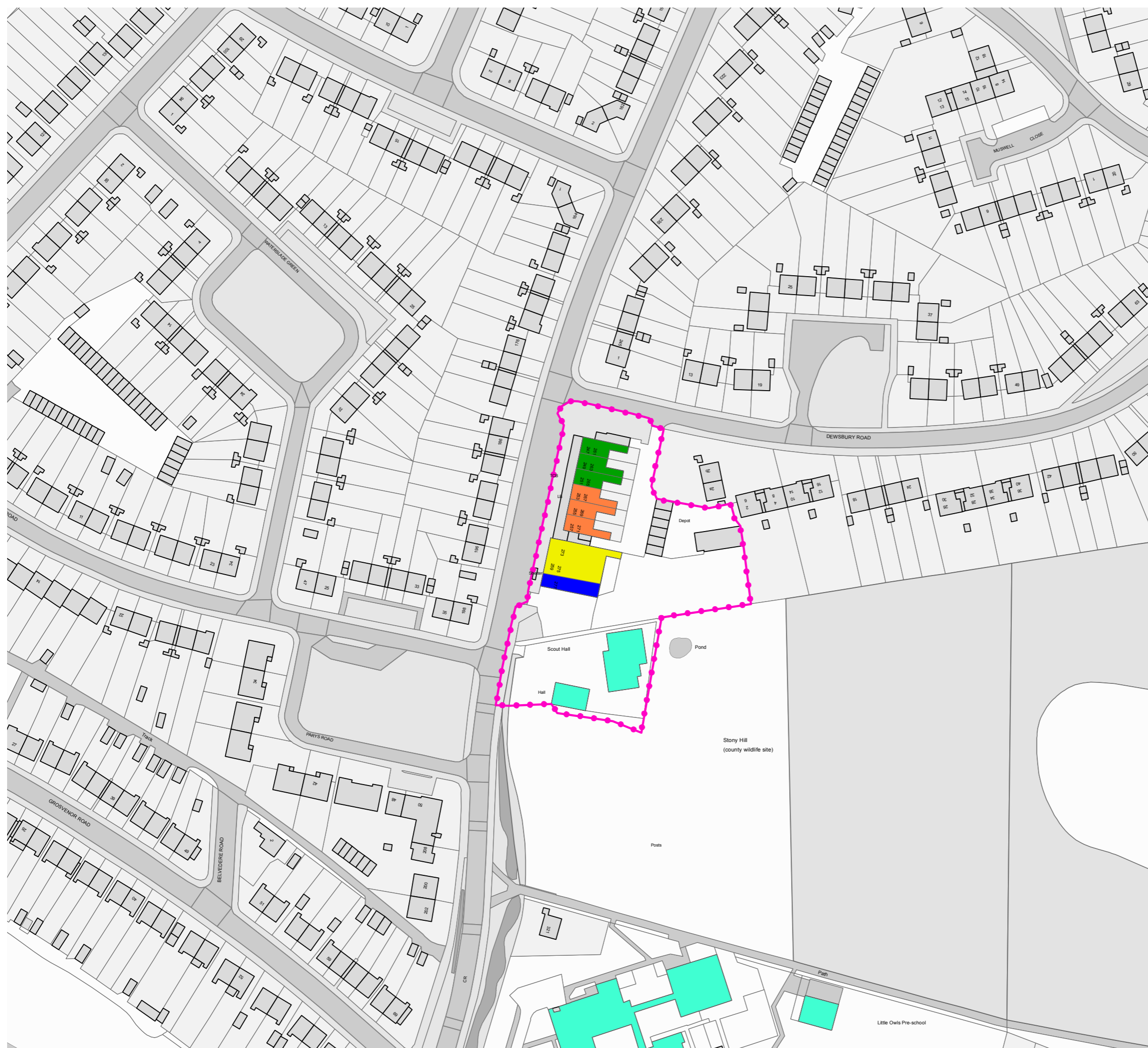
	<p>The appearance of the centre would be improved through the introduction of soft landscaping to soften the parade and street furniture to encourage pedestrian activity.</p>
<p>CONCLUSION</p>	<p>There has been little change at the centre since the 2012 audit. Although small the centre currently continues to perform a local centre function well at what is considered an important location to the north of the borough. The centre has a limited range but good mix of key retail/service uses which are well supplemented by a variety of community uses directly adjacent.</p> <p>The centre is considered to be a good candidate for future expansion and a focussing of public services in order to perform a function more akin to a neighbourhood centre function. Achieving a neighbourhood centre function at this location would meet a 'gap' in centre provision at this area of the borough.</p> <p>The existing parade is too constrained to cater for an increase in the choice and availability of units. However, it is understood land adjacent to the centre is in LBC ownership/control. As such, in this case WYG consider the potential exists to physically increase the size of the centre to accommodate additional uses. The lack of site prominence may limit the centre's retail attraction notwithstanding the nearby school and densely residential surrounds, but other uses (including community uses) could be provided at what is an already established location, served by public transport. Helpful additions to existing services would include bank representation and a commensurate increase in parking provision.</p> <p>Investment in the public realm such as the introduction of soft and hard landscaping improvements would enhance the environmental quality of the centre and encourage visitor attraction in greater numbers.</p> <p>Going forward it is recommended Birdsfoot Lane South centre becomes a focus for modest retail/community investment to enable the centre to perform a neighbourhood function.</p>
<p>KEY ISSUES</p>	<ul style="list-style-type: none"> • Current limited retail function • Potential for physical expansion
<p>RECOMMENDED DESIGNATION</p>	<p>Neighbourhood</p>

Key

- District centre boundary
- Neighbourhood centre boundary
- Retail frontage as identified by LPA

Goal Classification

- Convenience
- Comparison
- Service
- Unclassified
- Miscellaneous
- Vacant
- Community Facilities





Appendix 4 – Statistical Tables

WYG Planning & Environment
Luton Retail Study Refresh - Update 2015

Table 1: Population by zone based on SHMA Update 2015 OAN

Zone	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Zone 1A	60,435	61,250	62,039	62,809	63,516	64,208	64,870	65,531	66,182	66,810	67,450	68,086	68,716	69,322	69,881	70,391	70,900	71,409	71,893	72,371
Zone 1B	80,593	81,676	82,714	83,714	84,634	85,543	86,410	87,268	88,100	88,894	89,708	90,517	91,320	92,087	92,798	93,456	94,112	94,768	95,389	96,007
Zone 1C	75,916	76,937	77,917	78,857	79,724	80,577	81,389	82,197	82,972	83,717	84,480	85,235	85,990	86,709	87,381	88,004	88,625	89,245	89,820	90,396
Zone 2	75,502	76,280	77,089	77,909	78,749	79,597	80,448	81,316	82,183	83,052	83,923	84,781	85,608	86,393	87,127	87,832	88,538	89,190	89,842	90,474
Zone 3	46,560	46,873	47,215	47,593	47,967	48,364	48,760	49,184	49,608	50,043	50,484	50,914	51,337	51,744	52,099	52,422	52,747	53,073	53,400	53,705
Zone 4	45,266	45,831	46,404	46,981	47,551	48,124	48,696	49,267	49,842	50,413	50,987	51,548	52,079	52,601	53,068	53,504	53,940	54,364	54,789	55,177
Zone 5	25,220	25,513	25,811	26,114	26,409	26,712	27,013	27,318	27,623	27,928	28,233	28,534	28,818	29,098	29,350	29,582	29,814	30,039	30,265	30,474
Zone 6	27,515	27,887	28,262	28,634	29,007	29,378	29,748	30,119	30,486	30,853	31,222	31,586	31,939	32,291	32,592	32,876	33,160	33,436	33,711	33,973
Total	437,007	442,247	447,451	452,611	457,557	462,503	467,334	472,200	476,996	481,710	486,487	491,201	495,807	500,245	504,296	508,067	511,836	515,524	519,109	522,577

Notes

Zone 1A: LU11, LU15, LU14, LU13

Zone 1B: LU29, LU20, LU28, LU27

Zone 1C: LU32, LU34, LU40, LU49, LU33

Zone 2: SG17 5, SG16 6, SG53, SG51, SG40, SG49, SG52, SG48

Zone 3: AL48, AL51, AL52, AL54, AL55, AL37, AL53, AL38

Zone 4: LU62, LU61, LU63

Zone 5: LU55, LU56

Zone 6: MK45 1, MK45 5, MK45 4

Population projections provided ORS - Population by zone based on SHMA Update 2015 OAN

Table 2a: Convenience Expenditure Per Capita (£m)

Zone	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Zone 1A	1,548.4	1,551.5	1,556.1	1,557.7	1,563.9	1,570.2	1,573.3	1,582.8	1,593.8	1,603.4	1,613.0	1,621.1	1,629.2	1,640.6	1,648.8	1,657.1	1,667.0
Zone 1B	1,688.4	1,691.7	1,696.8	1,698.5	1,705.3	1,712.1	1,715.6	1,725.8	1,737.9	1,748.4	1,758.8	1,767.6	1,776.5	1,788.9	1,797.9	1,806.8	1,817.7
Zone 1C	1,646.6	1,649.9	1,654.8	1,656.5	1,663.1	1,669.7	1,673.1	1,683.1	1,694.9	1,705.1	1,715.3	1,723.9	1,732.5	1,744.6	1,753.4	1,762.1	1,772.7
Zone 2	2,033.4	2,037.5	2,043.6	2,045.6	2,053.8	2,062.0	2,066.2	2,078.6	2,093.1	2,105.7	2,118.3	2,128.9	2,139.5	2,154.5	2,165.3	2,176.1	2,189.2
Zone 3	2,171.4	2,175.8	2,182.3	2,184.5	2,193.2	2,202.0	2,206.4	2,219.7	2,235.2	2,248.6	2,262.1	2,273.4	2,284.8	2,300.8	2,312.3	2,323.8	2,337.8
Zone 4	2,000.4	2,004.4	2,010.4	2,012.4	2,020.4	2,028.5	2,032.6	2,044.8	2,059.1	2,071.5	2,083.9	2,094.3	2,104.8	2,119.5	2,130.1	2,140.8	2,153.6
Zone 5	1,832.2	1,835.9	1,841.4	1,843.2	1,850.6	1,858.0	1,861.7	1,872.9	1,886.0	1,897.3	1,908.7	1,918.2	1,927.8	1,941.3	1,951.0	1,960.8	1,972.6
Zone 6	2,140.3	2,144.6	2,151.1	2,153.2	2,161.8	2,170.5	2,174.8	2,187.9	2,203.2	2,216.4	2,229.7	2,240.8	2,252.0	2,267.8	2,279.1	2,290.5	2,304.3

Notes

Per Capita expenditure derived from Experian MMG3 Micromarketer (2012 data)
Projected forward using growth rates derived from Experian Retail Planner Briefing Note 12.1 (October 2014)
Excludes special forms of trading on the basis of Appendix 3 of Experian Retail Planner Briefing Note 12.1 (October 2014)

2012 Prices

Table 2b: Total Available Convenience Expenditure (£m)

Zone	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Growth in Available Convenience Expenditure							
																		2015-2020		2015-2025		2015-2030		2015-2031	
																		£m	%	£m	%	£m	%	£m	%
Zone 1A	97.3	98.5	99.9	101.0	102.5	103.9	105.1	106.8	108.5	110.2	111.8	113.3	114.7	116.3	117.7	119.1	120.6	6.7	6.9	14.6	15.0	21.9	22.5	23.4	24.0
Zone 1B	141.3	143.2	145.2	146.8	148.8	150.8	152.5	154.8	157.3	159.7	162.0	164.0	166.0	168.4	170.4	172.4	174.5	9.5	6.7	20.6	14.6	31.0	21.9	33.2	23.5
Zone 1C	129.8	131.5	133.3	134.8	136.7	138.5	140.1	142.2	144.5	146.6	148.7	150.6	152.5	154.6	156.5	158.3	160.2	8.7	6.7	18.9	14.5	28.4	21.9	30.4	23.4
Zone 2	158.4	160.5	162.7	164.6	167.0	169.5	171.6	174.4	177.5	180.3	183.0	185.5	187.9	190.8	193.1	195.5	198.1	11.0	7.0	24.6	15.5	37.1	23.4	39.6	25.0
Zone 3	103.3	104.4	105.5	106.5	107.9	109.2	110.4	112.1	113.8	115.4	117.0	118.4	119.8	121.4	122.7	124.1	125.6	5.9	5.7	13.7	13.3	20.7	20.1	22.2	21.5
Zone 4	94.0	95.3	96.7	98.0	99.5	101.1	102.5	104.3	106.1	107.9	109.6	111.1	112.6	114.3	115.8	117.3	118.8	7.1	7.6	15.6	16.6	23.3	24.8	24.8	26.4
Zone 5	47.8	48.5	49.2	49.8	50.6	51.3	52.0	52.9	53.8	54.7	55.5	56.3	57.0	57.9	58.6	59.3	60.1	3.5	7.3	7.7	16.1	11.5	24.0	12.3	25.6
Zone 6	61.3	62.2	63.2	64.1	65.1	66.2	67.1	68.3	69.6	70.8	72.0	73.0	74.0	75.2	76.2	77.2	78.3	4.9	8.0	10.7	17.5	15.9	26.0	17.0	27.7
Total	833.3	844.1	855.7	865.6	878.1	890.6	901.3	915.7	931.1	945.5	959.7	972.4	984.5	998.8	1011.1	1023.2	1036.2	57.3	6.9	126.4	15.2	189.9	22.8	202.9	24.4

Notes

Total available expenditure = population x expenditure per capita

2012 Prices

Table 2c: Total Available Main Food Shopping Expenditure (£m)

Zone	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Zone 1A	79.1	80.1	81.3	82.2	83.3	84.5	85.5	86.8	88.2	89.6	90.9	92.1	93.3	94.6	95.7	96.9	98.1
Zone 1B	115.0	116.5	118.1	119.5	121.1	122.8	124.1	126.0	128.0	129.9	131.8	133.5	135.1	137.0	138.7	140.3	142.0
Zone 1C	107.4	108.8	110.2	111.5	113.0	114.5	115.8	117.6	119.4	121.2	123.0	124.5	126.1	127.8	129.4	130.9	132.5
Zone 2	122.9	124.5	126.2	127.7	129.6	131.5	133.2	135.4	137.7	139.9	142.0	143.9	145.8	148.0	149.9	151.7	153.7
Zone 3	82.8	83.7	84.6	85.4	86.5	87.6	88.5	89.8	91.2	92.5	93.8	95.0	96.0	97.3	98.4	99.5	100.6
Zone 4	77.2	78.3	79.5	80.5	81.8	83.0	84.2	85.6	87.2	88.6	90.0	91.3	92.5	93.9	95.1	96.3	97.6
Zone 5	39.2	39.7	40.3	40.8	41.4	42.1	42.6	43.3	44.1	44.8	45.5	46.1	46.7	47.4	48.0	48.6	49.3
Zone 6	51.1	51.9	52.7	53.4	54.3	55.2	55.9	56.9	58.0	59.0	60.0	60.9	61.7	62.7	63.5	64.4	65.3
Total	674.8	683.5	692.9	700.9	711.0	721.2	729.8	741.5	754.0	765.6	777.2	787.4	797.2	808.8	818.7	828.6	839.1

Notes

Main food split derived from Question 7 of the NEMS Household Survey (2012), based on mean spend.

2012 Prices

Table 2d: Total Available Top-Up Food Shopping Expenditure (£m)

Zone	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Zone 1A	18.2	18.4	18.7	18.9	19.1	19.4	19.6	19.9	20.3	20.6	20.9	21.2	21.4	21.7	22.0	22.3	22.5
Zone 1B	26.3	26.6	27.0	27.3	27.7	28.1	28.4	28.8	29.3	29.7	30.1	30.5	30.9	31.3	31.7	32.1	32.5
Zone 1C	22.5	22.8	23.1	23.4	23.7	24.0	24.3	24.6	25.0	25.4	25.8	26.1	26.4	26.8	27.1	27.4	27.8
Zone 2	35.5	35.9	36.4	36.9	37.4	38.0	38.4	39.1	39.7	40.4	41.0	41.5	42.1	42.7	43.3	43.8	44.4
Zone 3	20.5	20.7	20.9	21.1	21.4	21.7	21.9	22.2	22.6	22.9	23.2	23.5	23.8	24.1	24.3	24.6	24.9
Zone 4	16.8	17.0	17.3	17.5	17.8	18.1	18.3	18.6	19.0	19.3	19.6	19.8	20.1	20.4	20.7	20.9	21.2
Zone 5	8.6	8.7	8.9	9.0	9.1	9.3	9.4	9.5	9.7	9.9	10.0	10.2	10.3	10.4	10.6	10.7	10.8
Zone 6	10.2	10.4	10.5	10.7	10.8	11.0	11.2	11.4	11.6	11.8	12.0	12.2	12.3	12.5	12.7	12.9	13.0
Total	158.6	160.6	162.8	164.7	167.1	169.4	171.5	174.2	177.1	179.9	182.6	185.0	187.3	190.0	192.3	194.7	197.1

Notes

Top-up food split derived from Question 7 of the NEMS Household Survey (2012), based on mean spend.

2012 Prices

WYG Planning & Environment
Luton Retail Study Refresh - Update 2015

Table 3a: Comparison Expenditure Per Capita (£m)

Zone	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Zone 1A	1,898.2	1,939.9	1,980.7	2,022.3	2,072.8	2,126.7	2,188.4	2,256.2	2,330.7	2,409.9	2,491.8	2,574.1	2,659.0	2,749.4	2,842.9	2,939.6	3,042.5
Zone 1B	2,256.3	2,306.0	2,354.4	2,403.8	2,463.9	2,528.0	2,601.3	2,681.9	2,770.4	2,864.6	2,962.0	3,059.8	3,160.8	3,268.2	3,379.3	3,494.2	3,616.5
Zone 1C	2,138.4	2,185.4	2,231.3	2,278.2	2,335.2	2,395.9	2,465.3	2,541.8	2,625.7	2,714.9	2,807.2	2,899.9	2,995.6	3,097.4	3,202.7	3,311.6	3,427.5
Zone 2	3,022.8	3,089.3	3,154.2	3,220.4	3,300.9	3,386.7	3,485.0	3,593.0	3,711.6	3,837.8	3,968.2	4,099.2	4,234.5	4,378.4	4,527.3	4,681.2	4,845.1
Zone 3	3,474.2	3,550.7	3,625.2	3,701.4	3,793.9	3,892.5	4,005.4	4,129.6	4,265.9	4,410.9	4,560.9	4,711.4	4,866.9	5,032.3	5,203.4	5,380.4	5,568.7
Zone 4	2,848.6	2,911.2	2,972.4	3,034.8	3,110.7	3,191.5	3,284.1	3,385.9	3,497.6	3,616.5	3,739.5	3,862.9	3,990.4	4,126.1	4,266.3	4,411.4	4,565.8
Zone 5	2,495.7	2,550.6	2,604.1	2,658.8	2,725.3	2,796.2	2,877.3	2,966.4	3,064.3	3,168.5	3,276.3	3,384.4	3,496.1	3,614.9	3,737.8	3,864.9	4,000.2
Zone 6	3,287.7	3,360.0	3,430.6	3,502.6	3,590.2	3,683.5	3,790.3	3,907.8	4,036.8	4,174.1	4,316.0	4,458.4	4,605.5	4,762.1	4,924.0	5,091.4	5,269.6

Notes

Per Capita expenditure derived from Experian MMG3 Micromarketer (2012 data)
Projected forward using growth rates derived from Experian Retail Planner Briefing Note 12.1 (October 2014)
Excludes special forms of trading on the basis of Appendix 3 of Experian Retail Planner Briefing Note 12.1 (October 2014)

2012 Prices

Table 3b: Total Available Comparison Expenditure (£m)

Zone	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Growth in available Comparison Expenditure							
																		2015-2020		2015-2025		2015-2030		2015-2031	
																		£m	%	£m	%	£m	%	£m	%
Zone 1A	119.2	123.2	127.2	131.2	135.8	140.7	146.2	152.2	158.7	165.6	172.7	179.9	187.2	194.9	203.0	211.3	220.2	21.5	18.1	53.5	44.9	92.1	77.3	101.0	84.7
Zone 1B	188.9	195.2	201.4	207.7	215.0	222.7	231.2	240.6	250.8	261.6	272.8	283.9	295.4	307.6	320.3	333.3	347.2	33.8	17.9	83.9	44.4	144.4	76.5	158.3	83.8
Zone 1C	168.6	174.2	179.8	185.4	191.9	198.8	206.4	214.7	223.8	233.5	243.4	253.4	263.6	274.5	285.8	297.4	309.8	30.2	17.9	74.8	44.3	128.8	76.4	141.2	83.7
Zone 2	235.5	243.3	251.1	259.1	268.4	278.3	289.4	301.5	314.7	328.5	342.8	357.2	371.9	387.7	403.8	420.6	438.4	42.8	18.2	107.3	45.6	185.1	78.6	202.9	86.1
Zone 3	165.3	170.3	175.3	180.5	186.6	193.1	200.4	208.5	217.2	226.4	236.0	245.5	255.1	265.4	276.2	287.3	299.1	27.8	16.8	70.6	42.7	122.0	73.8	133.7	80.9
Zone 4	133.8	138.4	143.0	147.8	153.3	159.1	165.6	172.6	180.3	188.3	196.7	205.0	213.5	222.6	231.9	241.7	251.9	25.2	18.9	62.9	47.0	107.9	80.6	118.1	88.2
Zone 5	65.2	67.4	69.6	71.8	74.4	77.2	80.4	83.8	87.4	91.3	95.3	99.3	103.4	107.8	112.3	117.0	121.9	12.1	18.5	30.2	46.3	51.8	79.5	56.7	87.0
Zone 6	94.1	97.5	100.8	104.2	108.1	112.3	116.9	122.0	127.5	133.3	139.4	145.3	151.4	157.9	164.6	171.6	179.0	18.2	19.3	45.2	48.0	77.5	82.3	84.9	90.2
Total	1170.7	1209.5	1248.2	1287.7	1333.6	1382.3	1436.6	1495.9	1560.4	1628.6	1699.1	1769.5	1841.6	1918.4	1997.9	2080.3	2167.5	211.6	18.1	528.4	45.1	909.6	77.7	996.8	85.1

Notes

Total available expenditure = population x expenditure per capita

2012 Prices

Table 3c: Comparison Expenditure Per Capita, 2015 (£m)

	2015							Total
	Clothes	Furniture	DIY	Dom App	TV, Radio	Personal	Recreation	
Zone 1A	36.0	14.5	6.9	4.7	11.8	26.6	19.1	119.5
Zone 1b	51.9	22.5	11.0	8.4	21.5	40.9	33.2	189.3
Zone 1C	45.7	19.0	9.8	7.6	19.5	36.0	31.3	169.0
Zone 2	60.4	28.5	15.0	11.2	27.5	50.7	42.8	236.1
Zone 3	43.0	19.8	10.7	8.6	19.3	34.9	29.4	165.7
Zone 4	34.4	15.3	8.4	6.0	16.5	28.7	24.9	134.2
Zone 5	17.0	7.5	3.8	3.0	7.6	13.7	12.6	65.3
Zone 6	23.7	11.3	6.1	4.3	11.6	20.2	17.1	94.4
Total	312.0	138.3	71.9	54.0	135.3	251.8	210.4	1173.5

Notes

Total available expenditure = population x expenditure per capita per comparison sector.

2012 Prices

Table 3d: Comparison Expenditure Per Sector, 2020 (£m)

	2020							Total
	Clothes	Furniture	DIY	Dom App	TV, Radio	Personal	Recreation	
Zone 1A	42.4	17.1	8.1	5.6	13.9	31.4	22.6	141.1
Zone 1b	61.2	26.5	13.0	9.9	25.3	48.2	39.1	223.3
Zone 1C	53.9	22.4	11.6	9.0	23.0	42.4	36.9	199.2
Zone 2	71.3	33.7	17.7	13.3	32.5	59.9	50.6	279.0
Zone 3	50.2	23.1	12.5	10.0	22.6	40.8	34.3	193.6
Zone 4	40.8	18.2	10.0	7.1	19.6	34.1	29.6	159.5
Zone 5	20.2	8.9	4.5	3.6	9.0	16.3	14.9	77.4
Zone 6	28.2	13.5	7.3	5.2	13.9	24.1	20.4	112.6
Total	368.3	163.3	84.9	63.7	159.7	297.3	248.4	1385.6

Notes

Total available expenditure = population x expenditure per capita per comparison sector.

2012 Prices

Table 3e: Comparison Expenditure Per Sector, 2025 (£m)

	2025							Total
	Clothes	Furniture	DIY	Dom App	TV, Radio	Personal	Recreation	
Zone 1A	52.1	20.9	10.0	6.9	17.0	38.6	27.7	173.1
Zone 1b	75.0	32.4	15.9	12.1	31.0	59.1	47.9	273.4
Zone 1C	66.0	27.5	14.2	11.0	28.1	51.9	45.2	244.0
Zone 2	87.9	41.5	21.9	16.3	40.0	73.8	62.3	343.7
Zone 3	61.3	28.3	15.3	12.3	27.6	49.9	41.9	236.5
Zone 4	50.5	22.5	12.4	8.8	24.3	42.1	36.6	197.2
Zone 5	24.9	11.0	5.6	4.4	11.1	20.1	18.4	95.5
Zone 6	35.0	16.7	9.1	6.4	17.2	29.9	25.3	139.7
Total	452.7	200.8	104.3	78.3	196.4	365.4	305.4	1703.2

Notes

Total available expenditure = population x expenditure per capita per comparison sector.

2012 Prices

Table 3f: Comparison Expenditure Per Sector, 2030 (£m)

	2030							Total
	Clothes	Furniture	DIY	Dom App	TV, Radio	Personal	Recreation	
Zone 1A	63.7	25.6	12.2	8.4	20.8	47.2	33.9	211.8
Zone 1b	91.6	39.6	19.5	14.8	37.9	72.2	58.5	334.1
Zone 1C	80.6	33.6	17.4	13.5	34.4	63.5	55.3	298.1
Zone 2	107.8	50.9	26.8	20.0	49.1	90.5	76.4	421.6
Zone 3	74.7	34.4	18.6	14.9	33.6	60.7	51.0	288.0
Zone 4	62.0	27.6	15.2	10.8	29.8	51.8	45.0	242.3
Zone 5	30.6	13.5	6.9	5.4	13.6	24.7	22.6	117.2
Zone 6	43.1	20.6	11.2	7.9	21.2	36.9	31.2	172.1
Total	554.2	245.8	127.7	95.9	240.4	447.4	373.9	2085.3

Notes

Total available expenditure = population x expenditure per capita per comparioson sector.

2012 Prices

Table 3g: Comparison Expenditure Per Sector, 2031 (£m)

	2031							Total
	Clothes	Furniture	DIY	Dom App	TV, Radio	Personal	Recreation	
Zone 1A	66.4	26.7	12.7	8.8	21.7	49.1	35.3	220.7
Zone 1b	95.4	41.3	20.3	15.4	39.5	75.2	60.9	348.1
Zone 1C	84.0	35.0	18.1	14.0	35.8	66.1	57.6	310.5
Zone 2	112.4	53.0	28.0	20.9	51.2	94.3	79.7	439.4
Zone 3	77.7	35.8	19.4	15.6	34.9	63.2	53.1	299.8
Zone 4	64.7	28.8	15.9	11.3	31.1	54.0	46.9	252.6
Zone 5	31.9	14.1	7.2	5.7	14.2	25.7	23.5	122.2
Zone 6	45.0	21.5	11.7	8.3	22.1	38.4	32.5	179.5
Total	577.4	256.1	133.1	99.9	250.5	466.1	389.6	2172.7

Notes

Total available expenditure = population x expenditure per capita per comparioson sector.

2012 Prices

Table 4: Convenience Shopping Patterns

Destination	Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6	
	Main (%)	Top-Up (%)	Main (%)	Top-Up (%)	Main (%)	Top-Up (%)	Main (%)	Top-Up (%)	Main (%)	Top-Up (%)	Main (%)	Top-Up (%)	Main (%)	Top-Up (%)	Main (%)	Top-Up (%)
Zone 1A																
Marks and Spencer, Arndale Centre, Luton	1	4	1	3	1									1		
Iceland, Park Street, Luton	1															
Tesco Metro, Arndale Centre, Luton	10	9	3	3	4	2			1	1						1
Local Stores, Luton Town Centre	1	11		11	1	6		1	4			3		3		1
Sainsburys, 34 Dunstable Road, Luton	13	3	7	2	1	1							1			
Local Stores, Bury Park District Centre	1	4		1							3					
Aldi, Francis Street, Luton			1								1				1	
Londis, Dallow Road, Luton																
Iceland, Marsh Road, Luton	1				2	2				1						
Lidl, Marsh Road, Luton					2	2										
Local Stores, Marsh Road District Centre, Luton				2		5										
Nisa Local, Leagrave, Luton	1	1			1	2										
Co-Op, 178-189, Marsh Road, Leagrave, Luton					1	5										
Co-Op (formerly Somerfield), 13-15 Market Square, Luton	1	7				1				1						
Nisa Local, Farley Hill, Luton		1														
Costcutter, Dunstable Road, Luton	7	4	2	1	9	2									1	
Tesco Express, Dunstable Road, Luton											2	3	3	3		
Aldi, Laporte Retail Park, Luton	6	3	1	1	4	2										1
Costcutter, Castle Street, Luton																
Londis, Leagrave, Luton																
Zone 1A Sub-Total	41	47	14	25	25	31		1	2	7	6	5	4	8	1	4
Zone 1B																
Co-Op (formerly Somerfield), Stopsley	1	1	3	9			1	1								
Tesco Express, Hitchin Road, Luton				2												
Local Stores, Stopsley District Centre, Luton		1	1	4												
Asda, Wigmore Hall, Wigmore Lane, Luton	16	3	54	21	4			1	1				2		1	
Iceland, Wigmore Park Centre, Luton		1		5												
Budgens, Hancock Drive, Luton				3												
Co-Op, Biscot Road, Luton				3	1	1				1						
Local Stores, High Town District Centre, Luton		8		7	1	6		1								
Costcutter, Alder Crescent, Luton																
Nisa Local, Ashcroft Road, Luton				1		1										
Tesco Express, Bishopscoote, Luton				2												
Zone 1B Sub-Total	17	14	58	58	5	9	1	3	1	1	1		2		1	
Zone 1C																
Nisa Local, Sundon Park Road, Luton						1										
Tesco Express, Sundon Park, Luton		1		1	1	4										
Nisa, Purley Centre, Luton					1	1										
Nisa Local, Purley Centre, Marsh Farm, Luton					1	6										
Tesco Express, Limbury Mead, Luton			1		2	15										
Londis, Addington Way, Luton																
Nisa Local, Ravenshill Way, Luton																
Nisa Local, Axe Close, Luton						1										
Sainsburys, Bramingham Park, Luton	4	3	16	2	42	15	2		2				2	3	16	1
Nisa Local, Lewsey Farm, Luton					2											
Zone 1C Sub-Total	4	4	17	3	45	44	1		2				2	3	16	1
Luton BC Sub-Total	62	65	88	85	74	83	2	4	5	9	8	5	8	11	18	5
Zone 2																
Iceland, Churchgate, Hitchin								19								
Local Stores, Hitchin																
Netto, Hitchin																
Sainsburys, Whinbush Road, Hitchin			1				24	22								
Waitrose, The Lairage, Hitchin			2	1	1		14	6								
Nisa Local, Wallsworth Way, Hitchin								1								
Asda, Queen Street, Hitchin																1
Morrisons, High Street, Shefford								11	9						4	5
Co-Op (formerly Somerfield), High Street, Shefford																
Zone 2 Sub-Total			3	1	1		48	60							4	7
Zone 3																
Nisa Weyman, Redbourn																
Co-Op (formerly Somerfield), Southdown Road, Harpenden		1							2	11						
Tesco Express, High Street, Wheathampstead									1	3						
Zone 3 Sub-Total		1							3	14						
Zone 4																
Local Stores, Dunstable		6		1		2				1			19	1	7	
Co-Op (formerly Somerfield), The Broadwalk, Dunstable													5			1
Iceland, High Street North, Dunstable									1	1			3	1		
Sainsburys, Luton Road, Dunstable	6				4	1		5	1	35	15	24	4	4	1	
Tesco, Luton Road, Dunstable	16	1	3	2	12	5			11			9				
Tesco Express, Langdale Road, Dunstable	1				1					1		8				
Tesco Express, High Street North, Dunstable	4	1	1		1	1				3	4	3	4			
Nisa Express, High Street, Dunstable																
Londis, Mayfield Road, Dunstable										1						
Nisa Local, Neptune Square, Dunstable																3
Aldi, Church Street, Dunstable		1								5	5	3	1			
Asda, Court Drive, Dunstable	4	1			5					30	16	22	3	2		
Co-Op, Manor Road, Caddington	1	14														
Zone 4 Sub-Total	33	24	4	3	22	9			6	6	85	75	63	22	3	1
Zone 5																
Co-Op, High Street, Houghton Regis (under re-construction)																3
Netto, Cemetery Road, Houghton Regis																
Netto, High Street, Houghton Regis																
Nisa Local, Dunstable Road, Dunstable														2	5	
Nisa Local, Hillsborough Crescent, Houghton Regis																4
Local Stores, Houghton Regis												1	1	11	3	
Tesco Express, Bedford Sq, Houghton Regis														1	3	
Morrisons, High Street, Houghton Regis					1					1	1	4	11			
Zone 5 Sub-Total					1					1	3	8	36			
Zone 6																
Co-Op, Bedford Road, Barton-Le-Clay, Bedford															1	26
Nisa Local, High Street, Westoning																
Tesco, Coniston Road, Flitwick							1						14	5	58	36
Local Stores, Flitwick													1	1		10
Zone 6 Sub-Total							1						15	7	59	71
Outside Study Area	5	11	5	11	2	8	48	36	85	71	6	18	5	24	16	15
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

Notes

Market share derived from Luton Household Survey (2012), Questions 10.
Excludes internet/delivery and don't do main food shopping responses.
Figures may not add due to rounding.

Table 5a: Convenience Shopping Patterns (€m), 2015

Destination	Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Total Survey Derived Turnover (€m)
	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	
Zone 1A																	
Luton Town Centre	10.0	4.3	3.9	4.7	5.7	2.0		0.5	0.9	1.0		0.4		0.3		0.3	33.9
Marks and Spencer, Arndale Centre, Luton	1.2	0.7	0.7	0.7	0.6									0.1			4.0
Iceland, Park Street, Luton	0.6			0.2	0.2												0.8
Tesco Metro, Arndale Centre, Luton	7.6	1.6	3.3	0.9	3.8	0.5			0.9	0.3						0.1	19.0
Local Stores, Luton Town Centre	0.6	2.0		2.9	1.3	1.5		0.5	0.8		0.4			0.2		0.1	10.2
Sainsbury's, 34 Dunstable Road, Luton	10.0	0.5	7.9	0.5	1.3	0.2			0.9		2.5		0.4				24.1
Local Stores, Bury Park District Centre	0.6	0.7		0.4							0.8						2.5
Lidl, Francis Street, Luton		0.2	0.7												0.5		1.4
Londis, Dallow Road, Luton																	
Iceland, Marsh Road, Luton	0.6				2.5	0.4			0.3								3.7
Lidl, Marsh Road, Luton					1.9	0.5											2.4
Local Stores, Marsh Road District Centre, Luton				0.5	1.1	1.1											1.6
Nisa Local, Leagrave, Luton	0.6	0.2			0.6	0.5											1.9
Co-Op, 178-189, Marsh Road, Leagrave, Luton					0.6	1.1											1.7
Co-Op (formerly Somerfield), 13-15 Market Square, Luton	0.6	1.2				0.2			0.3								2.3
Nisa Local, Farley Hill, Luton		0.2															0.2
Costcutter, Dunstable Road, Luton											1.7	0.4	1.2	0.1			0.1
Tesco Express, Dunstable Road, Luton	5.9	0.7	2.0	0.2	10.0	0.5								0.2		0.1	22.8
Aldi, Laporte Retail Park, Luton	4.7	0.5	1.3	0.2	3.8	0.4											11.0
Costcutter, Castle Street, Luton																	
Londis, Leagrave, Luton																	
Zone 1A Sub-Total	32.8	8.6	15.8	6.5	26.4	6.9		0.5	1.7	1.5	5.0	0.8	1.6	0.7	0.5	0.4	109.7
Zone 1B																	
Co-Op (formerly Somerfield), Stoppley			3.3	2.3				1.3									5.6
Tesco Express, Hitchin Road, Luton	0.6	0.2		0.5													2.8
Local Stores, Stoppley District Centre, Luton		0.2	0.7	1.1													1.9
Asda, Wigmore Hall, Wigmore Lane, Luton	12.9	0.5	62.4	5.4	3.8			0.5	0.9		0.8		0.8		0.5		88.5
Iceland, Wigmore Park Centre, Luton		0.2		1.3													1.4
Budgens, Hancock Drive, Luton					0.9												0.9
Co-Op, Biscot Road, Luton				0.9	0.6	0.2			0.3								2.0
Local Stores, High Town District Centre, Luton		1.4		1.8	0.6	1.5		0.5									5.8
Costcutter, Alder Crescent, Luton																	
Nisa Local, Asherill Road, Luton				0.4		0.2											0.5
Tesco Express, Bishopscote, Luton				0.5													0.5
Zone 1B Sub-Total	13.5	2.5	66.4	15.1	5.0	2.0	1.3	0.9	0.9	0.3	0.8	0.8	0.8	0.5	0.5	0.1	110.0
Zone 1C																	
Nisa Local, Sundon Park Road, Luton		0.2		0.2	0.6	0.2											0.2
Tesco Express, Sundon Park, Luton					0.9	0.9											1.9
Nisa, Purley Centre, Luton					0.6	0.2											0.8
Nisa Local, Purley Centre, Marsh Farm, Luton					0.6	1.3											1.9
Tesco Express, Limbury Mead, Luton			0.7		1.9	3.4											6.0
Londis, Adlington Way, Luton																	
Nisa Local, Ravenhill Way, Luton																	
Nisa Local, Axe Close, Luton						0.2											0.2
Sainsbury's, Birmingham Park, Luton	2.9	0.5	18.4	0.5	44.6	3.3	1.3		1.7				0.8	0.2	8.0	0.1	82.5
Nisa Local, Lewsey Farm, Luton						0.4											0.4
Zone 1C Sub-Total	2.9	0.7	19.1	0.7	48.3	9.8	1.3	1.7	1.7	0.3	0.8	0.8	0.8	0.2	8.0	0.1	93.8
Zone 1C Sub-Total	49.2	11.8	101.2	22.3	79.7	18.7	2.6	1.4	4.4	1.8	5.8	0.8	3.2	0.9	9.0	0.6	313.5
Zone 2																	
Iceland, Churchgate, Hitchin									6.9								6.9
Local Stores, Hitchin																	
Netto, Hitchin																	
Sainsbury's, Whinbush Road, Hitchin			1.3		29.8	7.8											38.9
Waitrose, The Lairs, Hitchin			2.0	0.4	16.8	2.3											22.1
Nisa Local, Watworth Road, Hitchin						0.5											0.5
Asda, Queen Street, Hitchin																0.1	0.6
Morrisons, High Street, Shefford							12.9	3.2							2.1	0.6	18.9
Co-Op (formerly Somerfield), High Street, Shefford																	
Zone 2 Sub-Total			3.3	0.4	0.6	59.5	21.2								2.1	0.7	87.8
Zone 3																	
Nisa Weyman, Redbourn		0.2							1.7	2.3							4.2
Co-Op (formerly Somerfield), Southdown Road, Harpenden									0.9	0.5							1.4
Tesco Express, High Street, Wheathampstead																	
Zone 3 Sub-Total		0.2							2.6	2.8							5.6
Zone 4																	
Local Stores, Dunstable		1.1		0.2		0.5				0.3		3.2	0.4	0.6			6.2
Co-Op (formerly Somerfield), The Broadwalk, Dunstable									0.9	0.3		0.4	0.4		0.1		1.0
Iceland, High Street North, Dunstable	4.7				3.8	0.2			4.4	0.3	27.4	2.5	9.3	0.3	0.5		2.0
Sainsbury's, Luton Road, Dunstable	12.9	0.2	3.9	0.5	12.6	1.1					8.3	3.6	3.6				53.4
Tesco, Luton Road, Dunstable	1.2				0.6												43.1
Tesco Express, Langdale Road, Dunstable	2.9	0.2	0.7		1.3	0.2					1.3	1.3	1.2	0.3			3.3
Tesco Express, High Street North, Dunstable									2.5	0.6							9.9
Nisa Express, High Street, Dunstable																	
Londis, Mayfield Road, Dunstable									0.3								0.3
Nisa Local, Neptune Square, Dunstable		0.2									4.2	0.8	1.2	0.1		0.2	0.2
Aldi, Church Street, Dunstable	2.9	0.2			5.7						23.2	2.8	8.5	0.2	1.1		6.5
Asda, Court Drive, Dunstable																	44.5
Co-Op, Manor Road, Caddington	1.2	2.5															3.7
Zone 4 Sub-Total	25.8	4.3	4.6	0.7	23.9	2.0			5.2	1.3	65.6	12.5	24.7	1.9	1.6	0.1	174.1
Zone 5																	
Co-Op, High Street, Houghton Regis (under re-construction)														0.2			0.2
Netto, Cemetery Road, Houghton Regis																	
Netto, High Street, Houghton Regis																	
Nisa Local, Dunstable Road, Dunstable													0.8	0.5			1.3
Nisa Local, Hillsborough Crescent, Houghton Regis														0.3			0.3
Local Stores, Houghton Regis											0.2	0.4	0.9				1.5
Tesco Express, Bedford Sq, Houghton Regis												0.4	0.2				0.6
Morrisons, High Street, Houghton Regis					1.3						0.8	0.2	1.6	0.9			4.8
Zone 5 Sub-Total					1.3						0.8	0.4	3.2	3.1			8.9
Zone 6																	
Co-Op, Bedford Road, Barton-Le-Clay, Bedford															0.5	2.7	3.2
Nisa Local, High Street, Westoning																	
Tesco, Coniston Road, Fitwick							1.3					5.7	0.5	29.8	3.6		40.9
Local Stores, Fitwick												0.4	0.1		1.0		1.5
Zone 6 Sub-Total							1.3					6.1	0.6	30.3	7.3		45.6
Survey Area Sub-Total	75.0	16.2	109.1	23.4	105.5	20.7	63.4	22.6	12.2	5.0	72.2	13.8	37.2	6.5			

Table 5b: Convenience Shopping Patterns (€m), 2020

Destination	Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Total Survey Derived Turnover (€m)
	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	
Zone 1A																	
Marks and Spencer, Arndale Centre, Luton	1.3	0.8	0.7	0.8	0.7								0.1				4.3
Iceland, Park Street, Luton	0.6		0.2														0.8
Tesco Metro, Arndale Centre, Luton	8.1	1.7	3.5	1.0	4.0	0.6			0.9	0.3					0.2		20.3
Local Stores, Luton Town Centre	0.6	2.1	3.1	1.3	1.5	1.5		0.5	0.8			0.5	0.3		0.2		10.8
Sainsbury's, 34 Dunstable Road, Luton	10.6	0.6	8.4	0.6	1.3	0.2			0.9			2.7					25.8
Local Stores, Bury Park District Centre	0.6	0.8	0.7	0.4								0.9			0.6		2.7
Lidl, Francis Street, Luton		0.2															1.5
Londis, Dallow Road, Luton																	
Iceland, Marsh Road, Luton	0.6				2.7	0.4											4.0
Lidl, Marsh Road, Luton					2.0	0.6				0.3							2.6
Local Stores, Marsh Road District Centre, Luton			0.6		1.2												1.7
Nisa Local, Leagrave, Luton	0.6	0.2			0.7	0.6											2.1
Co-Op, 178-189, Marsh Road, Leagrave, Luton					0.7	1.2											1.8
Co-Op (formerly Somerfield), 13-15 Market Square, Luton	0.6	1.3			0.2					0.3							2.4
Nisa Local, Farley Hill, Luton	0.2																0.2
Costcutter, Dunstable Road, Luton													0.1				0.1
Tesco Express, Dunstable Road, Luton	6.3	0.8	2.1	0.2	10.7	0.6					1.8	0.5	1.3	0.3			24.4
Aldi, Laporte Retail Park, Luton	5.0	0.6	1.4	0.2	4.0	0.4									0.2		11.7
Costcutter, Castle Street, Luton																	
Londis, Leagrave, Luton																	
Zone 1A Sub-Total	35.1	9.1	16.8	6.9	28.1	7.4	0.5	1.8	1.6	5.4	0.9	1.7	0.8	0.6	0.5		117.2
Zone 1B																	
Co-Op (formerly Somerfield), Stopsley			3.5	2.5		0.2	1.4										6.0
Tesco Express, Hitchin Road, Luton	0.6	0.2	0.7	1.2													3.0
Local Stores, Stopsley District Centre, Luton		0.2															2.0
Asda, Wigmore Hall, Wigmore Lane, Luton	13.8	0.6	66.6	5.8	4.0		0.5	0.9			0.9				0.6		94.5
Iceland, Wigmore Park Centre, Luton		0.2		1.3													1.5
Budgens, Hancock Drive, Luton				1.0													1.0
Co-Op, Biscot Road, Luton				1.0	0.7	0.2			0.3								2.1
Local Stores, High Town District Centre, Luton		1.5		1.9	0.7	1.5		0.5									6.2
Costcutter, Alder Crescent, Luton																	
Nisa Local, Ashcroft Road, Luton				0.4	0.2												0.6
Tesco Express, Bishopscoate, Luton				0.6													0.6
Zone 1B Sub-Total	14.4	2.7	70.9	16.2	5.4	2.1	1.4	1.0	0.9	0.3	0.9	0.9	0.6	0.6			117.5
Zone 1C																	
Nisa Local, Sundon Park Road, Luton						0.2											0.2
Tesco Express, Sundon Park, Luton		0.2		0.2	0.7	1.0											2.0
Nisa, Purley Centre, Luton					0.7	0.2											0.9
Nisa Local, Purley Centre, Marsh Farm, Luton					0.7	1.4											2.0
Tesco Express, Limbury Mead, Luton			0.7		2.0	3.7											6.4
Londis, Addington Way, Luton																	
Nisa Local, Ravenhill Way, Luton																	
Nisa Local, Axe Close, Luton						0.2											0.2
Sainsbury's, Bramingham Park, Luton	3.1	0.6	19.6	0.6	47.6	3.5	1.4		1.8			0.9	0.3	8.6	0.2		88.1
Nisa Local, Lewsey Farm, Luton					0.4												0.4
Zone 1C Sub-Total	3.1	0.8	20.3	0.8	51.6	10.4	1.4	1.8				0.9	0.3	8.6	0.2		100.1
Luton BC Sub-Total	52.6	12.6	108.0	23.8	85.1	19.9	2.8	1.5	4.6	1.9	6.3	0.9	3.5	1.0	9.8	0.6	334.8
Zone 2																	
Iceland, Churchgate, Hitchin								7.4									7.4
Local Stores, Hitchin																	
Netto, Hitchin																	
Sainsbury's, Winibush Road, Hitchin			1.4				31.8	8.4									41.6
Waitrose, The Lairage, Hitchin			2.1	0.4	0.7		18.0	2.5									23.6
Nisa Local, Wallsworth Road, Hitchin								0.5									0.5
Asda, Queen Street, Hitchin								0.5								0.2	0.6
Morrisons, High Street, Shefford							13.8	3.5							2.3	0.6	20.2
Co-Op (formerly Somerfield), High Street, Shefford																	
Zone 2 Sub-Total			3.5	0.4	0.7		63.7	22.7							2.3	0.8	94.0
Zone 3																	
Nisa Weyman, Redbourn								1.8	2.4								4.5
Co-Op (formerly Somerfield), Southdown Road, Harpenden		0.2							0.9	0.5							1.5
Tesco Express, High Street, Wheathampstead																	
Zone 3 Sub-Total		0.2							2.8	3.0							5.9
Zone 4																	
Local Stores, Dunstable		1.1		0.2		0.6				0.3		3.4	0.4	0.6			6.7
Co-Op (formerly Somerfield), The Broadwalk, Dunstable												0.9			0.2		1.1
Iceland, High Street North, Dunstable									0.9	0.3		0.5	0.4				2.1
Sainsbury's, Luton Road, Dunstable	5.0				4.0	0.2			4.6	0.3	29.5	2.7	10.0	0.4	0.6		57.2
Tesco, Luton Road, Dunstable	13.8	0.2	4.2	0.6	13.4	1.2					8.9	3.9					46.1
Tesco Express, Langfale Road, Dunstable	1.3				0.7							1.4					3.6
Tesco Express, High Street North, Dunstable	3.1	0.2	0.7		1.3	0.2				0.3	2.7	0.7	1.3	0.4			10.6
Nisa Express, High Street, Dunstable																	
Londis, Mayfield Road, Dunstable									0.3								0.3
Nisa Local, Neptune Square, Dunstable											4.5	0.9	1.3	0.1		0.3	0.3
Aldi, Church Street, Dunstable		0.2									25.0	3.0	9.1	0.3	1.1		7.0
Asda, Court Drive, Dunstable	3.1	0.2			6.0												47.8
Co-Op, Manor Road, Caddington	1.3	2.7															3.9
Zone 4 Sub-Total	27.5	4.6	4.9	0.8	25.5	2.1			5.5	1.4	70.5	13.5	26.5	2.0	1.7	0.2	186.6
Zone 5																	
Co-Op, High Street, Houghton Regis (under re-construction)														0.3			0.3
Netto, Cemetery Road, Houghton Regis																	
Netto, High Street, Houghton Regis													0.9	0.5			1.4
Nisa Local, Dunstable Road, Dunstable														0.4			0.4
Nisa Local, Hillsborough Crescent, Houghton Regis													0.2	1.0			1.7
Local Stores, Houghton Regis													0.4	0.3			0.7
Tesco Express, Bedford Sq, Houghton Regis					1.3						0.9	0.2	1.7	1.0			5.2
Morrisons, High Street, Houghton Regis																	
Zone 5 Sub-Total					1.3						0.9	0.5	3.5	3.4			9.5
Zone 6																	
Co-Op, Bedford Road, Barton-Le-Clay, Bedford															0.6	2.9	3.4
Nisa Local, High Street, Westoning																	
Tesco, Coniston Road, Filtwick							1.4						6.1	0.5	32.2	3.9	44.1
Local Stores, Filtwick													0.4	0.1		1.1	1.6
Zone 6 Sub-Total							1.4						6.5	0.6	32.7	7.8	49.1
Survey Area Sub-Total	80.1	17.3	116.4	25.0	112.5	22.1	67.8	24.2	12.9	6.2	77.7	14.9	39.9	7.0	46.5	9.4	679.9
Outside Study Area	4.4	2.1	6.3	3.1	2.0	1.9	63.7	13.8	74.7	15.4	5.4	3.2	2.2	2.3	8.6		

Table 5c: Convenience Shopping Patterns (€m), 2025

Destination	Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Total Survey Derived Turnover (€m)
	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	
Zone 1A																	
Marks and Spencer, Arndale Centre, Luton	1.3	0.8	0.8	0.8	0.7									0.1			4.6
Iceland, Park Street, Luton	0.7			0.2													0.9
Tesco Metro, Arndale Centre, Luton	8.8	1.8	3.8	1.0	4.3	0.6			1.0	0.3						0.2	21.8
Local Stores, Luton Town Centre	0.7	2.3	3.3	1.4	1.7		0.5		0.9		0.5		0.3		0.2		11.7
Sainsbury's, 34 Dunstable Road, Luton	11.5	0.6	9.0	0.6	1.4	0.2			1.0		2.9						27.7
Local Stores, Bury Park District Centre	0.7	0.8		0.4							1.0				0.6		2.9
Lidl, Francis Street, Luton		0.2	0.8														1.6
Londis, Dallow Road, Luton																	
Iceland, Marsh Road, Luton	0.7				2.9	0.4											4.3
Lidl, Marsh Road, Luton					2.2	0.6				0.3							2.8
Local Stores, Marsh Road District Centre, Luton				0.6		1.2											1.9
Nisa Local, Leagrave, Luton	0.7	0.2			0.7	0.6											2.2
Co-Op, 178-189, Marsh Road, Leagrave, Luton					0.7	1.2											2.0
Co-Op (formerly Somerfield), 13-15 Market Square, Luton	0.7	1.4			0.2					0.3							2.6
Nisa Local, Farley Hill, Luton		0.2															0.2
Costcutter, Dunstable Road, Luton														0.1			0.1
Tesco Express, Dunstable Road, Luton	6.7	0.8	2.3	0.2	11.5	0.6					1.9	0.5	1.4	0.3			26.3
Aldi, Laporte Retail Park, Luton	5.4	0.6	1.5	0.2	4.3	0.4									0.2		12.6
Costcutter, Castle Street, Luton																	
Londis, Leagrave, Luton																	
Zone 1A Sub-Total	37.7	9.8	18.1	7.4	30.2	7.9	0.5	2.0	1.7	5.8	1.0	1.9	0.8	0.6	0.5		126.0
Zone 1B																	
Co-Op (formerly Somerfield), Stopsley			3.8	2.7				1.5									6.5
Tesco Express, Hitchin Road, Luton	0.7	0.2		0.6		0.2											3.2
Local Stores, Stopsley District Centre, Luton		0.2	0.8	1.2													2.2
Asda, Wigmore Hall, Wigmore Lane, Luton	14.8	0.6	71.6	6.2	4.3		0.5	1.0			1.0		0.9		0.6		101.6
Iceland, Wigmore Park Centre, Luton		0.2		1.4													1.7
Budgens, Hancock Drive, Luton					1.0												1.0
Co-Op, Biscot Road, Luton					1.0	0.7	0.2			0.3							2.2
Local Stores, High Town District Centre, Luton		1.6		2.1	0.7	1.7		0.5									6.6
Costcutter, Alder Crescent, Luton																	
Nisa Local, Ashcroft Road, Luton				0.4		0.2											0.6
Tesco Express, Bishopscoate, Luton				0.6													0.6
Zone 1B Sub-Total	15.5	2.9	76.1	17.3	5.6	2.3	1.5	1.1	1.0	0.3	1.0	0.9	0.6	0.6			126.2
Zone 1C																	
Nisa Local, Sundon Park Road, Luton						0.2											0.2
Tesco Express, Sundon Park, Luton		0.2		0.2	0.7	1.0											2.2
Nisa, Purley Centre, Luton					0.7	0.2											0.9
Nisa Local, Purley Centre, Marsh Farm, Luton					0.7	1.5											2.2
Tesco Express, Limbury Mead, Luton			0.8		2.2	3.9											6.9
Londis, Addington Way, Luton																	
Nisa Local, Rowethill Way, Luton																	
Nisa Local, Axe Close, Luton						0.2											0.2
Sainsbury's, Birmingham Park, Luton	3.4	0.6	21.1	0.6	51.1	3.7	1.5	2.0				0.9	0.3	9.4	0.2		94.7
Nisa Local, Lewsey Farm, Luton						0.4											0.4
Zone 1C Sub-Total	3.4	0.8	21.8	0.8	55.4	11.2	1.5	2.0				0.9	0.3	9.4	0.2		107.7
Luton BC Sub-Total	56.6	13.5	116.0	25.6	91.3	21.4	3.0	1.6	4.9	2.0	6.8	1.0	3.8	1.1	10.6	0.7	359.9
Zone 2																	
Iceland, Churchgate, Hitchin								8.0									8.0
Local Stores, Hitchin																	
Netto, Hitchin																	
Sainsbury's, Winibush Road, Hitchin			1.5			34.4	9.0										44.9
Waitrose, The Lairage, Hitchin			2.3	0.4	0.7	19.4	2.7										25.5
Nisa Local, Wallsworth Road, Hitchin							0.5										0.5
Asda, Queen Street, Hitchin							0.5									0.2	0.7
Morrisons, High Street, Shefford						14.9	3.7							2.5	0.7		21.8
Co-Op (formerly Somerfield), High Street, Shefford																	
Zone 2 Sub-Total			3.8	0.4	0.7	68.8	24.5							2.5	0.8		101.5
Zone 3																	
Nisa Weyman, Redbourn									2.0	2.6							4.8
Co-Op (formerly Somerfield), Southdown Road, Harpenden		0.2							1.0	0.6							1.6
Tesco Express, High Street, Wheathampstead																	
Zone 3 Sub-Total		0.2							3.0	3.2							6.4
Zone 4																	
Local Stores, Dunstable		1.2		0.2		0.6				0.3		3.7	0.5	0.7		0.2	7.2
Co-Op (formerly Somerfield), The Broadwalk, Dunstable									1.0	0.3		1.0	0.5				1.2
Iceland, High Street North, Dunstable									4.9	0.3	31.9	3.0	10.8	0.4	0.6		61.9
Sainsbury's, Luton Road, Dunstable	5.4				4.3	0.2					9.7	4.2					49.7
Tesco, Luton Road, Dunstable	14.8	0.2	4.5	0.6	14.4	1.2						1.5					3.8
Tesco Express, Langiate Road, Dunstable	1.3				0.7					0.3							1.4
Tesco Express, High Street North, Dunstable	3.4	0.2	0.8		1.4	0.2					2.9	0.7	1.4	0.4			11.4
Nisa Express, High Street, Dunstable										0.3							0.3
Londis, Mayfield Road, Dunstable																	0.3
Nisa Local, Neptune Square, Dunstable		0.2							4.8	1.0	1.4	0.1		0.3			7.6
Aldi, Church Street, Dunstable		0.2							27.1	3.2	9.9	0.3	1.3				51.8
Asda, Court Drive, Dunstable	3.4	0.2			6.5												
Co-Op, Manor Road, Caddington	1.3	2.9															4.2
Zone 4 Sub-Total	29.6	4.9	5.3	0.8	27.3	2.3			5.9	1.5	76.5	14.6	28.6	2.2	1.9	0.2	201.6
Zone 5																	
Co-Op, High Street, Houghton Regis (under re-construction)														0.3			0.3
Netto, Cemetery Road, Houghton Regis																	
Netto, High Street, Houghton Regis														0.9	0.5		1.5
Nisa Local, Dunstable Road, Dunstable														0.4			0.4
Nisa Local, Hillsborough Crescent, Houghton Regis														0.5	1.1		1.8
Local Stores, Houghton Regis												0.2		0.5	0.3		0.7
Tesco Express, Bedford Sq, Houghton Regis					1.4						1.0	0.2	1.9	1.1			5.6
Morrisons, High Street, Houghton Regis																	
Zone 5 Sub-Total					1.4						1.0	0.5	3.8	3.7			10.3
Zone 6																	
Co-Op, Bedford Road, Barton-Le-Clay, Bedford															0.6	3.1	3.7
Nisa Local, High Street, Westoning																	
Tesco, Coniston Road, Filtwick							1.5						6.6	0.5	35.0	4.3	47.9
Local Stores, Filtwick													0.5	0.1	1.1		1.8
Zone 6 Sub-Total							1.5						7.0	0.7	35.6	8.5	53.4
Survey Area Sub-Total	86.2	18.6	125.0	26.8	120.8	23.7	73.3	26.1	13.8	6.7	84.2	16.1	43.2	7.6	50.6	10.2	733.0
Outside Study Area	4.7	2.3	6.8	3.3	2.2	2.1	68.8	14.9	80.0	16.5	5.8	3.5					

Table Sd: Convenience Shopping Patterns (€m), 2030

Destination	Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Total Survey	Derived Turnover (€m)
	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)		
Zone 1A																		
Marks and Spencer, Arndale Centre, Luton	1.4	0.9	0.8	0.9	0.8									0.1			4.9	
Iceland, Park Street, Luton	0.7			0.2													0.9	
Tesco Metro, Arndale Centre, Luton	9.3	2.0	4.0	1.1	4.6	0.7			1.0	0.3						0.2	23.2	
Local Stores, Luton Town Centre	0.7	2.4	3.5	1.5	1.8		0.6		0.9		0.5			0.3		0.2	12.4	
Sainsbury's, 34 Dunstable Road, Luton	12.2	0.7	9.6	0.7	1.5	0.2			1.0			3.1	0.5				29.5	
Local Stores, Bury Park District Centre	0.7	0.9	0.8	0.4								1.0			0.7		3.1	
Lidl, Francis Street, Luton		0.2															1.7	
Londis, Dallow Road, Luton																		
Iceland, Marsh Road, Luton	0.7				3.1	0.4											4.5	
Lidl, Marsh Road, Luton					2.3	0.7				0.3							3.0	
Local Stores, Marsh Road District Centre, Luton				0.7		1.3											2.0	
Nisa Local, Leagrave, Luton	0.7	0.2			0.8	0.7											2.4	
Co-Op, 178-189, Marsh Road, Leagrave, Luton					0.8	1.3											2.1	
Co-Op (formerly Somerfield), 13-15 Market Square, Luton	0.7	1.5				0.2				0.3							2.8	
Nisa Local, Farley Hill, Luton		0.2															0.2	
Costcutter, Dunstable Road, Luton																0.1	0.1	
Tesco Express, Dunstable Road, Luton	7.2	0.9	2.4	0.2	12.2	0.7					2.1	0.5	1.5	0.3			28.0	
Aldi, Laporte Retail Park, Luton	5.7	0.7	1.6	0.2	4.6	0.4										0.2	13.4	
Costcutter, Castle Street, Luton																		
Londis, Leagrave, Luton																		
Zone 1A Sub-Total	40.2	10.5	19.2	7.9	32.1	8.4	0.6	2.1	1.8	6.2	1.1	2.0	0.9	0.7	0.5		134.2	
Zone 1B																		
Co-Op (formerly Somerfield), Stopsley	0.7	0.2	4.0	2.9		0.2	1.6										6.9	
Tesco Express, Hitchin Road, Luton		0.2	0.8	1.3													3.4	
Local Stores, Stopsley District Centre, Luton		0.7															2.3	
Asda, Wigmore Hall, Wigmore Lane, Luton	15.8	0.7	76.1	6.6	4.6		0.6	1.0			1.0			1.0	0.7		108.1	
Iceland, Wigmore Park Centre, Luton		0.2		1.5													1.8	
Budgens, Hancock Drive, Luton				1.1													1.1	
Co-Op, Biscot Road, Luton				1.1	0.8	0.2			0.3								2.4	
Local Stores, High Town District Centre, Luton		1.7		2.2	0.8	1.8		0.6									7.0	
Costcutter, Alder Crescent, Luton						0.2											0.7	
Nisa Local, Ashcroft Road, Luton				0.4													0.7	
Tesco Express, Bishopscote, Luton				0.7														
Zone 1B Sub-Total	16.5	3.1	81.0	18.5	6.1	2.4	1.6	1.1	1.0	0.3	1.0	1.0	1.0	0.7			134.3	
Zone 1C																		
Nisa Local, Sundon Park Road, Luton						0.2											0.2	
Tesco Express, Sundon Park, Luton		0.2		0.2	0.8	1.1											2.3	
Nisa, Purley Centre, Luton					0.8	0.2											1.0	
Nisa Local, Purley Centre, Marsh Farm, Luton					0.8	1.5											2.3	
Tesco Express, Limbury Mead, Luton			0.8		2.3	4.2											7.3	
Londis, Adlington Way, Luton																		
Nisa Local, Ravenhill Way, Luton																		
Nisa Local, Axe Close, Luton						0.2											0.2	
Sainsbury's, Birmingham Park, Luton	3.6	0.7	22.4	0.7	54.3	4.0	1.6	2.1				1.0	0.3	10.1	0.2		100.9	
Nisa Local, Lewsey Farm, Luton						0.4											0.4	
Zone 1C Sub-Total	3.6	0.9	23.2	0.9	58.9	11.9	1.6	2.1				1.0	0.3	10.1	0.2		114.7	
Luton BC Sub-Total	60.3	14.4	123.4	27.2	97.2	22.8	3.2	1.7	5.2	2.2	7.3	1.1	4.0	1.2	11.4	0.7	383.2	
Zone 2																		
Iceland, Churchgate, Hitchin																		
Local Stores, Hitchin								8.5									8.5	
Netto, Hitchin																		
Sainsbury's, Whinbush Road, Hitchin			1.6				36.7	9.7									48.0	
Waitrose, The Lairage, Hitchin			2.4	0.4	0.8		20.8	2.8									27.2	
Nisa Local, Wallsworth Road, Hitchin								0.5									0.5	
Asda, Queen Street, Hitchin								0.6									0.7	
Morrisons, High Street, Shefford							16.0	4.0							2.7	0.7	23.3	
Co-Op (formerly Somerfield), High Street, Shefford																		
Zone 2 Sub-Total			4.0	0.4	0.8		73.5	26.2								2.7	0.8	108.4
Zone 3																		
Nisa Weyman, Redbourn									2.1	2.8							5.1	
Co-Op (formerly Somerfield), Southdown Road, Harpenden		0.2							1.0	0.6							1.7	
Tesco Express, High Street, Wheathampstead																		
Zone 3 Sub-Total		0.2							3.1	3.4							6.7	
Zone 4																		
Local Stores, Dunstable		1.3		0.2		0.7				0.3		4.0	0.5	0.7			7.7	
Co-Op (formerly Somerfield), The Broadwalk, Dunstable												1.1			0.2		1.2	
Iceland, High Street North, Dunstable									1.0	0.3		0.5	0.5				2.4	
Sainsbury's, Luton Road, Dunstable	5.7				4.6	0.2			5.2	0.3	34.2	3.2	11.5	0.4	0.7		66.1	
Tesco, Luton Road, Dunstable	15.8	0.2	4.8	0.7	15.3	1.3					10.4	1.6	4.5				53.0	
Tesco Express, Langdale Road, Dunstable	1.4				0.8					0.3		1.6	1.6				4.1	
Tesco Express, High Street North, Dunstable	3.6	0.2	0.8	1.5	0.2						3.1	0.8	1.5	0.4			12.2	
Nisa Express, High Street, Dunstable										0.3							0.3	
Londis, Mayfield Road, Dunstable																	0.3	
Nisa Local, Neptune Square, Dunstable														0.3			0.3	
Aldi, Church Street, Dunstable		0.2									5.2	1.1	1.5	0.1			8.1	
Asda, Court Drive, Dunstable	3.6	0.2			6.9						29.0	3.4	10.5	0.3	1.3		55.3	
Co-Op, Manor Road, Caddington	1.4	3.1															4.5	
Zone 4 Sub-Total	31.6	5.2	5.6	0.9	29.1	2.4			6.3	1.5	81.8	15.6	30.6	2.3	2.0	0.2	215.2	
Zone 5																		
Co-Op, High Street, Houghton Regis (under re-construction)														0.3			0.3	
Netto, Cemetery Road, Houghton Regis																		
Netto, High Street, Houghton Regis																		
Nisa Local, Dunstable Road, Dunstable													1.0	0.6			1.6	
Nisa Local, Hillsborough Crescent, Houghton Regis														0.4			0.4	
Local Stores, Houghton Regis												0.3	0.5	1.2			1.9	
Tesco Express, Bedford Sq, Houghton Regis													0.5	0.3			0.8	
Morrisons, High Street, Houghton Regis					1.5					1.0	0.3	2.0	1.2				6.0	
Zone 5 Sub-Total					1.5					1.0	0.5	4.0	3.9				11.0	
Zone 6																		
Co-Op, Bedford Road, Barton-le-Clay, Bedford															0.7	3.3	4.0	
Nisa Local, High Street, Westoning																		
Tesco, Coniston Road, Flitwick							1.6					7.0	0.6	37.5	4.6		51.3	
Local Stores, Flitwick												0.5	0.1	1.2			1.9	
Zone 6 Sub-Total							1.6					7.5						

Table 5e: Convenience Shopping Patterns (€m), 2011

Destination	Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Total Survey Derived Turnover (€m)
	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	Main (€m)	Top-Up (€m)	
Zone 1A																	
Marks and Spencer, Arndale Centre, Luton	1.5	0.9	0.8	0.9	0.8									0.1			5.0
Iceland, Park Street, Luton	0.7			0.2													0.9
Tesco Metro, Arndale Centre, Luton	9.4	2.0	4.1	1.1	4.6	0.7			1.1	0.3					0.2		23.5
Local Stores, Luton Town Centre	0.7	2.4	3.6	1.5	1.8		0.6		0.9		0.5		0.3		0.2		12.6
Sainsbury's, 34 Dunstable Road, Luton	12.4	0.7	9.7	0.7	1.5	0.2			1.1		3.1		0.5				29.9
Local Stores, Bury Park District Centre	0.7	0.9	0.8	0.4							1.0				0.7		3.1
Lidl, Francis Street, Luton																	1.7
Londis, Dallow Road, Luton																	
Iceland, Marsh Road, Luton	0.7				3.1	0.4											4.6
Lidl, Marsh Road, Luton					2.3	0.7				0.3							3.0
Local Stores, Marsh Road District Centre, Luton			0.7		1.3												2.0
Nisa Local, Leagrave, Luton	0.7	0.2			0.8	0.7											2.4
Co-Op, 178-189, Marsh Road, Leagrave, Luton					0.8	1.3											2.1
Co-Op (formerly Somerfield), 13-15 Market Square, Luton	0.7	1.5	0.2		0.2					0.3							2.8
Nisa Local, Farley Hill, Luton		0.2															0.2
Costcutter, Dunstable Road, Luton														0.1			0.1
Tesco Express, Dunstable Road, Luton	7.3	0.9	2.4	0.2	12.4	0.7					2.1	0.5	1.5	0.3			28.3
Aldi, Laporte Retail Park, Luton	5.8	0.7	1.6	0.2	4.6	0.4									0.2		13.6
Costcutter, Castle Street, Luton																	
Londis, Leagrave, Luton																	
Zone 1A Sub-Total	40.7	10.6	19.5	8.0	32.5	8.5	0.6	2.1	1.9	6.3	1.1	2.0	0.9	0.7	0.5	0.5	135.9
Zone 1B																	
Co-Op (formerly Somerfield), Stopsley			4.1	2.9													7.0
Tesco Express, Hitchin Road, Luton	0.7	0.2	0.7		0.2		1.6										3.5
Local Stores, Stopsley District Centre, Luton		0.2	0.8	1.3													2.4
Asda, Wigmore Hall, Wigmore Lane, Luton	16.0	0.7	77.1	6.7	4.6		0.6	1.1			1.0		1.0		0.7		109.5
Iceland, Wigmore Park Centre, Luton		0.2		1.6													1.8
Budgens, Hancock Drive, Luton				1.1													1.1
Co-Op, Biscot Road, Luton				1.1	0.8	0.2			0.3								2.4
Local Stores, High Town District Centre, Luton		1.8		2.2	0.8	1.8		0.6									7.1
Costcutter, Alder Crescent, Luton																	
Nisa Local, Ashcroft Road, Luton				0.4	0.2												0.7
Tesco Express, Bishopscote, Luton				0.7													0.7
Zone 1B Sub-Total	16.7	3.1	82.0	18.7	6.2	2.5	1.6	1.2	1.1	0.3	1.0	1.0	0.7	0.7	0.7	0.7	136.0
Zone 1C																	
Nisa Local, Sundon Park Road, Luton						0.2											0.2
Tesco Express, Sundon Park, Luton		0.2		0.2	0.8	1.1											2.3
Nisa, Purley Centre, Luton					0.8	0.2											1.0
Nisa Local, Purley Centre, Marsh Farm, Luton					0.8	1.6											2.3
Tesco Express, Limbury Mead, Luton			0.8		2.3	4.3											7.4
Londis, Addington Way, Luton																	
Nisa Local, Ravenhill Way, Luton																	
Nisa Local, Axe Close, Luton						0.2											0.2
Sainsbury's, Bramingham Park, Luton	3.6	0.7	22.7	0.7	55.0	4.0	1.6		2.1			1.0	0.3	10.2	0.2		102.1
Nisa Local, Lewsey Farm, Luton						0.4											0.4
Zone 1C Sub-Total	3.6	0.9	23.5	0.9	59.7	12.1	1.6	2.1	2.1	1.0	1.0	0.3	10.2	0.2	10.2	0.2	116.1
Luton BC Sub-Total	61.0	14.6	125.0	27.6	98.4	23.1	3.2	1.7	5.3	2.2	7.3	1.1	4.1	1.2	11.6	0.7	388.0
Zone 2																	
Iceland, Churchgate, Hitchin																	
Local Stores, Hitchin								8.6									8.6
Netto, Hitchin																	
Sainsbury's, Winibush Road, Hitchin			1.6				37.2	9.8									48.6
Waitrose, The Lairage, Hitchin			2.4	0.4	0.8		21.0	2.9									27.6
Nisa Local, Wallsworth Road, Hitchin								0.6									0.6
Asda, Queen Street, Hitchin								0.6								0.2	0.8
Morrisons, High Street, Shefford							16.2	4.0						2.7	0.7		23.6
Co-Op (formerly Somerfield), High Street, Shefford																	
Zone 2 Sub-Total			4.1	0.4	0.8		74.4	26.5							2.7	0.9	109.8
Zone 3																	
Nisa Weyman, Redbourn									2.1	2.8							5.1
Co-Op (formerly Somerfield), Southdown Road, Harpenden		0.2							1.1	0.6							1.7
Tesco Express, High Street, Wheathampstead																	
Zone 3 Sub-Total		0.2							3.2	3.4							6.8
Zone 4																	
Local Stores, Dunstable		1.3		0.2		0.7				0.3		4.0	0.5	0.7			7.8
Co-Op (formerly Somerfield), The Broadwalk, Dunstable									1.1	1.1		1.1	0.5	0.5		0.2	1.3
Iceland, High Street North, Dunstable									1.1	0.3		3.2	11.7	0.4	0.7		2.4
Sainsbury's, Luton Road, Dunstable	5.8				4.6	0.2			5.3	0.3	34.6	3.2	11.7	0.4	0.7		67.0
Tesco, Luton Road, Dunstable	16.0	0.2	4.9	0.7	15.5	1.3					10.5	4.6	4.6				53.7
Tesco Express, Langfile Road, Dunstable	1.5				0.8							1.5	1.6				4.2
Tesco Express, High Street North, Dunstable	3.6	0.2	0.8		1.5	0.2				0.3	3.1	0.8	1.5	0.4			12.4
Nisa Express, High Street, Dunstable																	
Londis, Mayfield Road, Dunstable										0.3							0.3
Nisa Local, Neptune Square, Dunstable																0.3	0.3
Aldi, Church Street, Dunstable		0.2									5.2	1.1	1.5	0.1			8.2
Asda, Court Drive, Dunstable	3.6	0.2			7.0						29.4	3.5	10.7	0.3	1.4		56.0
Co-Op, Manor Road, Caddington	1.5	3.1															4.5
Zone 4 Sub-Total	32.0	5.3	5.7	0.9	29.4	2.5			6.4	1.6	82.9	15.9	31.0	2.3	2.0	0.2	218.0
Zone 5																	
Co-Op, High Street, Houghton Regis (under re-construction)														0.3			0.3
Netto, Cemetery Road, Houghton Regis																	
Netto, High Street, Houghton Regis																	
Nisa Local, Dunstable Road, Dunstable													1.0	0.6			1.6
Nisa Local, Hillsborough Crescent, Houghton Regis																	0.4
Local Stores, Houghton Regis												0.3	0.5	1.2			1.9
Tesco Express, Bedford Sq, Houghton Regis											1.0	0.3	2.0	1.2			0.8
Morrisons, High Street, Houghton Regis					1.5												6.1
Zone 5 Sub-Total					1.5						1.0	0.5	4.1	4.0			11.2
Zone 6																	
Co-Op, Bedford Road, Barton-Le-Clay, Bedford															0.7	3.4	4.1
Nisa Local, High Street, Westoning																	
Tesco, Coniston Road, Filwick							1.6						7.1	0.6	38.1	4.6	52.0
Local Stores, Filwick													0.5	0.1		1.2	1.9
Zone 6 Sub-Total							1.6						7.6	0.7	38.7	9.3	58.0
Survey Area Sub-Total	83.0	20.1	134.7	28.9	130.2	25.5	79.3	28.2	14.8	7.2	91.3	17.5	46.7	8.2	55.1	11.1	791.8
Outside Study Area	5.1	2.4	7.3	3.6	2.3	2.2 </											

Table 6: Comparison Shopping Patterns (Clothes and Shoes)

Destination	Zone 1A Clothes & Shoes (%)	Zone 1B Clothes & Shoes (%)	Zone 1C Clothes & Shoes (%)	Zone 2 Clothes & Shoes (%)	Zone 3 Clothes & Shoes (%)	Zone 4 Clothes & Shoes (%)	Zone 5 Clothes & Shoes (%)	Zone 6 Clothes & Shoes (%)
Zone 1A								
Arndale Centre, Luton	2	3	1		1			
Courts, Park Street West, Luton								
Luton Town Centre	79	57	58	5	16	19	19	14
Bury Park Centre, Luton								
Bury Park District Centre, Luton								
Chaulend Lane Retail Park, Luton								
Comet, Luton Retail Park, Gipsy Lane, Luton								
Luton Retail Park, Gipsy Lane, Luton		1						
B&Q Mini Warehouse, Luton Retail Park, Gipsy Lane, Luton								
Gipsy Lane Retail Park, Luton	1	1			1	1	2	
Laporte Retail Park, Dallow Road, Luton					1			
B&Q Warehouse, Laporte Retail Park, Luton								
Joe Grahams Electricals, Dallow Road, Luton								
Zone 1A Sub-Total	81	62	59	5	20	20	21	14
Zone 1B								
Stopsley Centre, Luton								
Wigmore Centre, Luton		1			2			
Wigmore District Centre, Luton		1						
High Town Centre, Luton								
Zone 1B Sub-Total		2			2			
Zone 1C								
Homebase, Bramingham Park (Enterprise Way)								
Sundon Park Centre, Luton								
Marsh Road Centre, Luton								
Zone 1C Sub-Total								
Luton BC Sub-Total	81	64	59	5	22	20	21	14
Zone 2								
Sheffield								2
Hitchin		2	1	13				1
B&Q, Hitchin								
Wilkinsons, Hitchin								
Zone 2 Sub-Total		2	1	13				3
Zone 3								
Harpenden					1			1
Zone 3 Sub-Total					1			1
Zone 4								
Dunstable Town Centre	1		3			17	12	
B&Q, Dunstable								
Carpet Right, Luton Road, Dunstable								
Wickes, Dunstable								
Kempstone Homebase, Luton Road, Dunstable								
Dunelm, Luton Road, Dunstable								
White Lion Retail Park, Dunstable								
Homebase, Luton Road, Dunstable								
Zone 4 Sub-Total	1		3			17	12	
Zone 5								
Houghton Regis Town centre								
Zone 5 Sub-Total								
Zone 6								
Flitwick								1
Zone 6 Sub-Total								1
Survey Area Sub-Total	82	66	63	18	23	37	33	20
Out of Study Area	18	34	37	80	77	63	67	80
Total	100	100	100	99	100	100	100	100

Notes

Market share derived from Luton Household Survey (2012), Questions 11.
Excludes internet/delivery and don't do main food shopping responses.
Figures may not add due to rounding.

Table 7: Comparison Shopping Patterns (Furniture & Floor Coverings & Other Textiles)

Destination	Zone 1A Furniture & Floor (%)	Zone 1B Furniture & Floor (%)	Zone 1C Furniture & Floor (%)	Zone 2 Furniture & Floor (%)	Zone 3 Furniture & Floor (%)	Zone 4 Furniture & Floor (%)	Zone 5 Furniture & Floor (%)	Zone 6 Furniture & Floor (%)
Zone 1A								
Arndale Centre, Luton	1							
Courts, Park Street West, Luton	25	19	19	2	7	5	7	4
Luton Town Centre								
Bury Park Centre, Luton	5		2					
Bury Park District Centre, Luton	5		1					
Chaulend Lane Retail Park, Luton	1							
Comet, Luton Retail Park, Gipsy Lane, Luton	1							
Luton Retail Park, Gipsy Lane, Luton	2	2	4		3			
B&Q Mini Warehouse, Luton Retail Park, Gipsy Lane, Luton		7	1					
Gipsy Lane Retail Park, Luton	14	18	8		3	3	5	1
Laporte Retail Park, Dallow Road, Luton	5	4	7	2	2		9	4
B&Q Warehouse, Laporte Retail Park, Luton	4	2	2				4	1
Joe Grams Electricals, Dallow Road, Luton								
Zone 1A Sub-Total	63	52	45	3	15	8	25	12
Zone 1B								
Stopsley Centre, Luton								
Wigmore Centre, Luton								
Wigmore District Centre, Luton								
High Town Centre, Luton								
Zone 1B Sub-Total								
Zone 1C								
Homebase, Bramingham Park (Enterprise Way)		1						1
Sundon Park Centre, Luton								
Marsh Road Centre, Luton			1					
Zone 1C Sub-Total		1	1					1
Luton BC Sub-Total	63	53	46	3	15	8	25	13
Zone 2								
Shefford								1
Hitchin	1	1	1	16				
B&Q, Hitchin								
Wilkinsons, Hitchin								
Zone 2 Sub-Total	1	1	1	16				1
Zone 3								
Harpenden		1			12			
Zone 3 Sub-Total		1			12			
Zone 4								
Dunstable Town Centre	1	4	9		2	20	4	
B&Q, Dunstable			2					
Carpet Right, Luton Road, Dunstable	1	1				7	2	
Wickes, Dunstable							4	
Kemptstone Homebase, Luton Road, Dunstable								
Dunelm, Luton Road, Dunstable	4	2	2			2	5	1
White Lion Retail Park, Dunstable	9		8			15	14	1
Homebase, Luton Road, Dunstable	1	1					4	
Zone 4 Sub-Total	16	7	21		2	43	32	3
Zone 5								
Houghton Regis Town centre								
Zone 5 Sub-Total								
Zone 6								
Filtwick							4	3
Zone 6 Sub-Total							4	3
Survey Area Sub-Total	80	62	68	20	29	51	60	21
Out-of-Boundary	20	38	32	80	71	49	40	79
Total	100	100	100	100	100	100	100	100

Notes

Market share derived from Luton Household Survey (2012), Questions 12.
Excludes internet/delivery and don't do main food shopping responses.
Figures may not add due to rounding.

Table 8: Comparison Shopping Patterns (DIY & Decorating)

Destination	Zone 1A DIY & Decorating (%)	Zone 1B DIY & Decorating (%)	Zone 1C DIY & Decorating (%)	Zone 2 DIY & Decorating (%)	Zone 3 DIY & Decorating (%)	Zone 4 DIY & Decorating (%)	Zone 5 DIY & Decorating (%)	Zone 6 DIY & Decorating (%)
Zone 1A								
Arndale Centre, Luton		1						
Courts, Park Street West, Luton	13	2	4		4	3	6	5
Luton Town Centre								
Bury Park Centre, Luton		1						
Bury Park District Centre, Luton								
Chaulend Lane Retail Park, Luton	1							
Comet, Luton Retail Park, Gipsy Lane, Luton								
Luton Retail Park, Gipsy Lane, Luton	2	1	1		3			
B&Q Mini Warehouse, Luton Retail Park, Gipsy Lane, Luton	34	52	14	1	36	5	19	4
Gipsy Lane Retail Park, Luton	1	7			4			
Laporte Retail Park, Dallow Road, Luton	1	2	4		1	1	2	
B&Q Warehouse, Laporte Retail Park, Luton	37	24	44	1	6	26	32	34
Joe Grahams Electricals, Dallow Road, Luton								
Zone 1A Sub-Total	87	90	67	2	54	35	59	42
Zone 1B								
Stopsley Centre, Luton								
Wigmore Centre, Luton								
Wigmore District Centre, Luton								
High Town Centre, Luton								
Zone 1B Sub-Total								
Zone 1C								
Homebase, Bramingham Park (Enterprise Way)	1	7	21	4			4	22
Sundon Park Centre, Luton								
Marsh Road Centre, Luton			1					
Zone 1C Sub-Total	1	7	22	4			4	22
Luton BC Sub-Total	88	97	89	6	54	35	62	65
Zone 2								
Shefford								1
Hitchin				12				
B&Q, Hitchin				1				
Wilkinsons, Hitchin				2				
Zone 2 Sub-Total				16				1
Zone 3								
Harpenden					7			
Zone 3 Sub-Total					7			
Zone 4								
Dunstable Town Centre	1	1	1			8	2	
B&Q, Dunstable	5		3			17	6	
Carpet Right, Luton Road, Dunstable								
Wickes, Dunstable	2		2			9	6	
Kempton Homebase, Luton Road, Dunstable								
Dunelm, Luton Road, Dunstable						1		
White Lion Retail Park, Dunstable						2	5	
Homebase, Luton Road, Dunstable	3	1	3		4	21	15	3
Zone 4 Sub-Total	11	1	10		4	59	34	3
Zone 5								
Houghton Regis Town centre								
Zone 5 Sub-Total								
Zone 6								
Flitwick								4
Zone 6 Sub-Total								4
Survey Area Sub-Total	99	98	99	22	65	94	96	72
Out-of-Boundary	1	2	1	78	35	6	4	28
Total	100	100	100	100	100	100	100	100

Notes

Market share derived from Luton Household Survey (2012), Questions 13.
Excludes internet/delivery and don't do main food shopping responses.
Figures may not add due to rounding.

Table 9: Comparison Shopping Patterns (Domestic Appliances)

Destination	Zone 1A Domestic Appliances (%)	Zone 1B Domestic Appliances (%)	Zone 1C Domestic Appliances (%)	Zone 2 Domestic Appliances (%)	Zone 3 Domestic Appliances (%)	Zone 4 Domestic Appliances (%)	Zone 5 Domestic Appliances (%)	Zone 6 Domestic Appliances (%)
Zone 1A Arndale Centre, Luton Courts, Park Street West, Luton Luton Town Centre	30	12	21	1	5	11	12	5
Bury Park Centre, Luton Bury Park District Centre, Luton								
Chaulend Lane Retail Park, Luton	4	4	7			2	2	
Comet, Luton Retail Park, Gipsy Lane, Luton	18	21	6		2	5	5	2
Luton Retail Park, Gipsy Lane, Luton	5	2	4		2		2	2
B&Q Mini Warehouse, Luton Retail Park, Gipsy Lane, Luton		1	1		3		2	
Gipsy Lane Retail Park, Luton	9	27	13		12	2	8	8
Laporte Retail Park, Dallow Road, Luton	12	2	20	1	5	7	9	7
B&Q Warehouse, Laporte Retail Park, Luton	1	2				2		
Joe Grahams Electricals, Dallow Road, Luton	7	7	5			3	6	5
Zone 1A Sub-Total	86	78	77	3	27	31	44	28
Zone 1B Stopsley Centre, Luton								
Wigmore Centre, Luton Wigmore District Centre, Luton		1						
High Town Centre, Luton								
Zone 1B		1						
Zone 1C Homebase, Bramingham Park (Enterprise Way)			1					
Sundon Park Centre, Luton								
Marsh Road Centre, Luton	1		4					
Zone 1C Sub-Total	1		5					
Luton BC Sub-Total	87	79	81	3	27	31	44	28
Zone 2 Shefford				1				
Hitchin B&Q, Hitchin Wilkinsons, Hitchin				7				3
Zone 2 Sub-Total				9				3
Zone 3 Harpenden					2			
Zone 3 Sub-Total					2			
Zone 4 Dunstable Town Centre B&Q, Dunstable Carpet Right, Luton Road, Dunstable Wickes, Dunstable Kempton Homebase, Luton Road, Dunstable Dunelm, Luton Road, Dunstable White Lion Retail Park, Dunstable Homebase, Luton Road, Dunstable	3	2	4			31	11	
	1	2	2			18	17	
Zone 4 Sub-Total	4	3	7			49	27	
Zone 5 Houghton Regis Town centre								
Zone 5 Sub-Total								
Zone 6 Flitwick								
Zone 6 Sub-Total								
Survey Area Sub-Total	91	82	88	11	29	80	71	32
Out-of-Boundary	9	18	12	89	71	20	29	68
Total	100	100	100	100	100	100	100	100

Notes

Market share derived from Luton Household Survey (2012), Questions 14.
Excludes internet/delivery and don't do main food shopping responses.
Figures may not add due to rounding.

Table 10: Comparison Shopping Patterns (TV-Radio)

Destination	Zone 1A TV-Radio (%)	Zone 1B TV-Radio (%)	Zone 1C TV-Radio (%)	Zone 2 TV-Radio (%)	Zone 3 TV-Radio (%)	Zone 4 TV-Radio (%)	Zone 5 TV-Radio (%)	Zone 6 TV-Radio (%)
Zone 1A Arndale Centre, Luton Courts, Park Street West, Luton Luton Town Centre	20	12	20	1	1	6	6	5
Bury Park Centre, Luton Bury Park District Centre, Luton								
Chaulend Lane Retail Park, Luton Comet, Luton Retail Park, Gipsy Lane, Luton Luton Retail Park, Gipsy Lane, Luton	6 13 7	3 16 2	10 4 5	3	1 1	3 3	5 2	2 3
B&Q Mini Warehouse, Luton Retail Park, Gipsy Lane, Luton Gipsy Lane Retail Park, Luton Laporte Retail Park, Dallow Road, Luton B&Q Warehouse, Laporte Retail Park, Luton	22 8	31 2	12 14 1		14 4	6 2	8 5	6 5
Joe Grahams Electricals, Dallow Road, Luton	1							
Zone 1A Sub-Total	76	66	65	4	22	24	25	20
Zone 1B Stopsley Centre, Luton Wigmore Centre, Luton Wigmore District Centre, Luton High Town Centre, Luton							2	
Zone 1B Sub-Total							2	
Zone 1C Homebase, Bramingham Park (Enterprise Way) Sundon Park Centre, Luton Marsh Road Centre, Luton								
	1		3					
Zone 1C Sub-Total	1		3					
Luton BC Sub-Total	77	66	68	4	22	24	26	20
Zone 2 Shefford Hitchin B&Q, Hitchin Wilkinsons, Hitchin								
				13				2
Zone 2 Sub-Total				13				2
Zone 3 Harpenden								
	1				1			
Zone 3 Sub-Total	1				1			
Zone 4 Dunstable Town Centre B&Q, Dunstable Carpet Right, Luton Road, Dunstable Wickes, Dunstable Kempton Homebase, Luton Road, Dunstable Dunelm, Luton Road, Dunstable White Lion Retail Park, Dunstable Homebase, Luton Road, Dunstable	5 3	2 2	5 3			23 23	12 18	
Zone 4 Sub-Total	8	3	7		3	45	31	2
Zone 5 Houghton Regis Town centre								
							2	
Zone 5 Sub-Total							2	
Zone 6 Flitwick								
Zone 6 Sub-Total								
Survey Area Sub-Total	86	70	75	17	26	69	58	23
Out-of-Boundary	14	30	25	83	74	31	42	77
Total	100	100	100	100	100	100	100	100

Notes

Market share derived from Luton Household Survey (2012), Questions 15.
Excludes internet/delivery and don't do main food shopping responses.
Figures may not add due to rounding.

Table 11: Comparison Shopping Patterns (Personal & Luxury)

Destination	Zone 1A P&L (%)	Zone 1B P&L (%)	Zone 1C P&L (%)	Zone 2 P&L (%)	Zone 3 P&L (%)	Zone 4 P&L (%)	Zone 5 P&L (%)	Zone 6 P&L (%)
Zone 1A Arndale Centre, Luton Courts, Park Street West, Luton Luton Town Centre	70	61	55	2	4	6	9	11
Bury Park Centre, Luton Bury Park District Centre, Luton	2	1	1					
Chaulend Lane Retail Park, Luton Comet, Luton Retail Park, Gipsy Lane, Luton Luton Retail Park, Gipsy Lane, Luton B&Q Mini Warehouse, Luton Retail Park, Gipsy Lane, Luton Gipsy Lane Retail Park, Luton Laporte Retail Park, Dallow Road, Luton B&Q Warehouse, Laporte Retail Park, Luton Joe Grahams Electricals, Dallow Road, Luton	2	2			1			2
Zone 1A Sub-Total	75	65	56	2	6	6	9	13
Zone 1B Stopsley Centre, Luton Wigmore Centre, Luton Wigmore District Centre, Luton High Town Centre, Luton	2	6						
Zone 1B Sub-Total	4	6						
Zone 1C Homebase, Bramingham Park (Enterprise Way) Sundon Park Centre, Luton Marsh Road Centre, Luton								
Zone 1C								
Luton BC Sub-Total	79	71	56	2	6	6	9	13
Zone 2 Shefford Hitchin B&Q, Hitchin Wilkinsons, Hitchin		2		2	48			2
Zone 2 Sub-Total		2		50				2
Zone 3 Harpenden	1				43			
Zone 3 Sub-Total	1				43			
Zone 4 Dunstable Town Centre B&Q, Dunstable Carpet Right, Luton Road, Dunstable Wickes, Dunstable Kempton Homebase, Luton Road, Dunstable Dunelm, Luton Road, Dunstable White Lion Retail Park, Dunstable Homebase, Luton Road, Dunstable	2		8			33	23	
Zone 4 Sub-Total	4		9			33	23	
Zone 5 Houghton Regis Town centre		1					5	
Zone 5 Sub-Total		1					5	
Zone 6 Flitwick								11
Zone 6 Sub-Total								11
Survey Area Sub-Total	84	74	65	52	49	38	36	25
Out-of-Boundary	16	26	35	48	51	62	64	75
Total	100	100	100	100	100	100	100	100

Notes

Market share derived from Luton Household Survey (2012), Questions 16.
Excludes internet/delivery and don't do main food shopping responses.
Figures may not add due to rounding.

Table 12: Comparison Shopping Patterns (Recreation)

Destination	Zone 1A Recreation (%)	Zone 1B Recreation (%)	Zone 1C Recreation (%)	Zone 2 Recreation (%)	Zone 3 Recreation (%)	Zone 4 Recreation (%)	Zone 5 Recreation (%)	Zone 6 Recreation (%)
Zone 1A								
Arndale Centre, Luton	2	5						
Courts, Park Street West, Luton								
Luton Town Centre	60	59	36		6	8	21	6
Bury Park Centre, Luton			2					3
Bury Park District Centre, Luton								
Chaulend Lane Retail Park, Luton								
Comet, Luton Retail Park, Gipsy Lane, Luton								
Luton Retail Park, Gipsy Lane, Luton	2	5	3		4	3	3	
B&Q Mini Warehouse, Luton Retail Park, Gipsy Lane, Luton								
Gipsy Lane Retail Park, Luton	20	12	17		4	5	8	3
Laporte Retail Park, Dallow Road, Luton	2					3		
B&Q Warehouse, Laporte Retail Park, Luton								
Joe Grahams Electricals, Dallow Road, Luton								
Zone 1A Sub-Total	85	81	59		14	18	32	11
Zone 1B								
Stopsley Centre, Luton								
Wigmore Centre, Luton								
Wigmore District Centre, Luton								
High Town Centre, Luton			2					
Zone 1B Sub-Total			2					
Zone 1C								
Homebase, Bramingham Park (Enterprise Way)								
Sundon Park Centre, Luton								
Marsh Road Centre, Luton			2					
Zone 1C Sub-Total			2					
Luton BC Sub-Total	85	81	62		14	18	32	11
Zone 2 Shefford								
Shefford								
Hitchin				37			3	
B&Q, Hitchin								
Wilkinsons, Hitchin								
Zone 2 Sub-Total				37			3	
Zone 3								
Harpenden					24			
Zone 3 Sub-Total					24			
Zone 4								
Dunstable Town Centre	2		7			26	16	
B&Q, Dunstable								
Carpet Right, Luton Road, Dunstable								
Wickes, Dunstable								
Kempton Homebase, Luton Road, Dunstable								
Dunelm, Luton Road, Dunstable								
White Lion Retail Park, Dunstable	5		5		2	8		
Homebase, Luton Road, Dunstable								
Zone 4 Sub-Total	7		12		2	33	16	
Zone 5								
Houghton Regis Town centre							3	
Zone 5 Sub-Total							3	
Zone 6								
Flitwick								8
Zone 6 Sub-Total								8
Survey Area Sub-Total	92	81	74	37	41	51	53	19
Out-of-Boundary	8	19	26	63	59	49	47	81
Total	100	100	100	100	100	100	100	100

Notes

Market share derived from Luton Household Survey (2012), Questions 17.
Excludes internet/delivery and don't do main food shopping responses.
Figures may not add due to rounding.

Table 14a: Convenience Retail Commitments

Commitment	Address	Planning Reference	Description	Approved	Retail Floorspace (Sq m Net)	Sales Density (£/sq m)	Turnover (£m)
Unknown	Land Opposite Whitbread House Flowers Way Luton Bedfordshire	06/01585/RENEW	Development of land to provide mixed use scheme comprising 202 residential units, 148 bedroom Hotel, Class A1, A3/A4 retail floorspace and car parking.	11.02.10	539.00	3,500.00	1.89
Aldi	Scott Road, Sundon Park, Luton	14/00849/FUL	Erection of a 1,140sqm net foodstore together with landscaping and associated works	05.12.14	912.00	8,600.00	7.84
Unknown	Former Vauxhall Motors Site (Napier Park) Kimpton Road Luton Bedfordshire	13/00280/OUT	Outline application for a mixed use development - Residential, Retail, Office, storage and distribution, hotel and casino uses, new landscaping, park and public realm, car parking, means of access, new access to Kimpton Road and other associated works. (With EIA).	Apr-15	1,788.50	12,527.00	22.40
Morrisons	11-15 High Town Road, Luton	14/01450/COU	Change of use of ground floor to A1 (retail) with associated office, canteen and kitchen facilities.	05.02.2015	394.40	11,993.00	4.73
LBC	Purley Centre (Marsh Farm)	13/00782	Demolition and erection of 1,502sqm of retail floorspace with 16 maisonettes, 85 flats and 11 dwellings and associated development	16/10/2013			0.40
HRDC	HRN1 (foodstore)	CB/12/0361/OUT	Outline planning permission with the details of access, appearance, landscaping, layout and scale reserved for later determination. Development to comprise: up to 5,150 dwellings (Use Class C3); up to 202,500 sqm gross of additional development in Use Classes: A1, A2, A3 (retail), A4 (public house), A5 (take away); B1, B2, B8 (offices, industrial and storage and distribution); C1 (hotel), C2 (care home), D1 and D2 (community and leisure); car showroom; data centre; petrol filling station; car	02.06.2014	3,900.00		49.59
HRDC	HRN 1 (Other)	as above	as above	02.06.2014	1,544.00		11.58
Total					9077.90		98.43

Notes

pp ref: 13/00280/out conv floorspace assumed to be 70% of permitted supermarket floorspace (2,555 sqm net) and assumed average sales density

pp 14/01450/cou floorspace assumed to be 80% of gross (493sqm)

ref: 13/00782 - £D.4m retail turnover uplift

Data from Luton Borough Council, March 2015

2012 Prices

Table 14b: Comparison Retail Commitments

Commitment	Address	Planning Reference	Description	Approved	Retail Floorspace (Sq m Net)	Sales Density (£/sq m)	Turnover (£m)
Non-food (no operator)	64 Bute Street Luton Bedfordshire LU1 2EY	10/00430/FUL	Part change of use of ground floor and change of use of upper floors from Use Class A1 (retail) to Use Class A3 (restaurant) together with alterations to the shop frontage.	08.06.10	41.00	2,500.00	0.10
Bulky Non-food (no operator)	Land East Of Aldi & B&Q Dallow Road Luton LU4 8RJ	04/01799/RENEW	Proposed mixed use development of land for B1/B2 unit and retail unit (for the sale of furniture/floor coverings/DIY and hardware goods)	29.11.11	2,380.00	2,500.00	5.95
Unknown	Former Vauxhall Motors Site (Napier Park) Kimpton Road Luton Bedfordshire	13/00280/OUT	Outline application for a mixed use development - Residential, Retail, Office, storage and distribution, hotel and casino uses, new landscaping, park and public realm, car parking, means of access, new access to Kimpton Road and other associated works. (With EIA).	Apr-15	1,428.00	6,000.00	8.57
HRDC	HRN1 (foodstore)	CB/12/0361/OUT	Outline planning permission with the details of access, appearance, landscaping, layout and scale reserved for later determination. Development to comprise: up to 5,150 dwellings (Use Class C3); up to 202,500 sqm gross of additional development in Use Classes: A1, A2, A3 (retail), A4 (public house), A5 (take away); B1, B2, B8 (offices, industrial and storage and distribution); C1 (hotel), C2 (care home), D1 and D2 (community and leisure); car showroom; data centre; petrol filling station; car parking; primary substation; energy centre	02.06.2014	2,600.00		19.50
HRDC	HRN1 (Other)	as above	as above	02.06.2014	81.00		0.61
HRDC	HRN1 (Other)	as above	as above	02.06.2014	8,750.00		50.74
Total					3,849.00		85.47

Notes

pp ref: 13/00280/out - assumed 50% of permitted Class A1-A5 floorspace (70% of 4,080sqm gross, est 2,856 sqm net (assumed)) to be brought forward for A1 comp retail

Data from Luton Borough Council, March 2015

2012 Prices

Table 15 Existing Convenience turnover

Store	Estimated Survey Derived Total Turnover (Em)	Net Convenience goods Floorspace (sqm)	Average Sales Density (£/sqm)	Benchmark turnover (Em)	% Difference from Average Sales Density	Total Turnover Difference (Em)
	[1]	[3]	[5]	[6]	[7]	[8]
ZONE 1A						
LUTON TOWN CENTRE						
Tesco Metro, The Mall	19.0	1,200	10,514	12.6	150	6
Other	14.9	4,030	3,500	14.1	106	1
BURY PARK CENTRE						
Sainsburys, Dunstable Road	24.1	2,527	13,123	33.2	73	-9
Lidl, Francis Street	1.4	1,144	4,112	4.7	29	-3
Other	2.5	2,147	3,500	7.5	33	-5
MARKET SQUARE (FARLEY) CENTRE						
Nisa	0.2	186	3,500	0.7	27	0
Cooperative	2.3	201	8,614	1.7	131	1
Other	0.0	215	3,500	0.8	0	-1
Out-of-Centre						
Costcutter, Dunstable Road, Luton	0.1	23	6,629	0.2	76	0
Tesco Express, Dunstable Road, Luton	22.8	387	10,514	4.1	562	19
Aldi, Laporte Retail Park, Luton	11.0	642	8,600	5.5	199	5
Costcutter, Castle Street, Luton	0.0	123	6,629	0.8	0	-1
Londis, Leagrave, Luton	0.0	75	5,957	0.4	0	0
ZONE 1B						
STOPSLEY CENTRE						
Cooperative	5.6	300	8,614	2.6	218	3
Tesco Express	2.8	215	10,514	2.3	123	1
Other	1.9	156	3,500	0.5	351	1
HIGH TOWN						
High Town Supermarket	1.4	154	3,500	0.5	267	1
Abams Foods	1.4	232	3,500	0.8	178	1
Best One	1.4	130	3,500	0.5	317	1
Other	1.4	444	3,500	1.6	93	-0.1
WIGMORE CENTRE						
Asda	88.5	3,502	14,467	50.7	175	38
Iceland	1.4	352	6,696	2.4	61	-1
Other		108	3,500	0.4	0	0
BISCOT ROAD/BLENHEIM CRES CENTRE						
Cooperative	2.0	282	8,614	2.4	81	0
Other		269	3,500	0.9	0	-1
ROUND GREEN						
Various		208	3,500	0.7	0	-1
HANCOCK DRIVE						
Budgens	0.9	269	3,500	0.9	96	0.0
Other		84	3,500	0.3	0	-0.3
Out-of-Centre						
Costcutter, Alder Crescent, Luton	0.0	40	6,629	0.3	0	-0.3
Nisa Local, Ashcroft Road, Luton	0.5	39	3,500	0.1	397	0.4
Tesco Express, Bishopscote, Luton	0.5	189	10,514	2.0	27	-1
ZONE 1C						
SUNDON PARK CENTRE						
Tesco Express	1.9	218	10,514	2.3	83	0
Nisa	0.2	103	3,500	0.4	50	0
Other		392	3,500	1.4	0	-1
MARSH ROAD CENTRE						
Cooperative		1,000	8,614	8.6	0	-9
Lidl		850	4,112	3.5	0	-3
Iceland		800	6,696	5.4	0	-5
Other		394	3,500	1.4	0	-1
FREEMAN AVENUE CENTRE						
Major News		21	3,500	0.1	0	0
Other		0				
CALVERTON ROAD						
Tesco Express		220	10,514	2.3	0	-2
Other		88	3,500	0.3	0	0
PURLEY CENTRE (MARSH FARM)						
Nisa Extra	2.7	251	3,500	0.9	308	2
Other		153	3,500	0.5	0	-1
ST DOMINIC'S SQUARE						
Nisa	0.4	260	3,500	0.9	40	-1
Cooperative		223	8,614	1.9	0	-2
Other		103	3,500	0.4	0	0
HOCKWELL RING CENTRE						
Nisa		300	3,500	1.1	0	-1
Other		28	3,500	0.1	0	0
Out-of-Centre						
Tesco Express, Limbury Mead, Luton	6.0	162	10,514	1.7	351	4
Londis Addington Way, Luton	0.0	29	5,957	0.2	0	0
Nisa Local, Ravenhill Way, Luton	0.0	78	5,957	0.5	0	0
Nisa Local, Axe Close, Luton	0.2	215	5,957	1.3	14	-1
Sainsburys, Bramingham Park, Luton	82.5	4199	13,123	55.1	150	27
Luton BC Total Benchmark Turnover				246.2		

Notes:

Estimated Total turnover taken from Table 6

Net Floorspace figures taken from 2009 Retail Study, N.Herts retail study update 2010 and LBC Survey information where available

Net Convenience Goods Floorspace derived from 2009 study, LBC survey info and WYG assumptions

Sales densities based on company average trading performance of convenience goods floorspace taken from Verdickt Grocery Retailers 2013, Mintel Retail Rankings 2014 or WYG estimate.

Lidl floorspace figure derived from app ref: 09/00090/tul

Table 17: Estimated (Benchmark) Global Convenience Floorspace Capacity in Luton (Increased Market Share)

	2015	2020	2025	2030	2031
[1] Available Convenience Goods Expenditure (£m)	313.5	335.1	393.5	419.5	424.9
[2] Market Share in 2015 (%)	38	38	41	41	41
[3] Turnover of Existing (£m)	246.2	243.2	243.7	244.9	245.2
[4] Residual Expenditure (£m)	67.4	91.8	149.8	174.6	179.7
[5] Commitments (£m)	37.3	36.8	98.6	99.1	99.2
[6] Residual Expenditure (£m)	30.1	55.0	51.2	75.5	80.5
[7] Assumed Sales Density of New Floorspace (£/sq m) (A)	12,527	12,377	12,402	12,464	12,477
[7] Assumed Sales Density of New Floorspace (£/sq m) (B)	8,869	8,763	8,887	8,913	8,878
[8] Floorspace Capacity (sq m) (A)	2,402	4,446	4,125	6,055	6,450
[8] Floorspace Capacity (sq m) (B)	3,393	6,279	5,757	8,467	9,064

Notes

[1] Convenience Market Share of Existing Retailers derived from Table 5a

[2] Market Share = turnover of existing retailers/total available expenditure

[3] Turnover of Existing Retailers derived from Table 15.

[4] = [1] - [3]

[5] Commitments derived from Table 14a.

[6] = [4] - [5]

[7] Assumed Sales Densities of New Floorspace WYG Assumptions based on a median of 'Big four' s/d (A) and lower densities of non-big four stores inc. deep discount operators (B)

[8] = [6] - [7]

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 12.1 Addendum (Oct 2014)

2012 Prices

Table 18: Estimated (Baseline) Global Comparison Floorspace Capacity in Luton (Constant Market Share)

	2015	2020	2025	2030	2031
[1] Available Comparison Goods Expenditure (£m)	425.5	502.0	615.9	753.2	784.7
[2] Market Share in 2015 (%)	36	36	36	36	36
[3] Turnover of Existing (£m)	425.5	471.1	524.3	584.5	597.4
[4] Residual Expenditure (£m)	0.0	30.9	91.6	168.7	187.3
[5] Commitments (£m)	14.6	16.2	95.1	106.0	108.4
[6] Residual Expenditure (£m)	-14.6	14.7	-3.5	62.7	79.0
[7] Assumed Sales Density of New Floorspace (£/sq m) (A)	5,000	5,537	6,161	6,869	7,020
[7] Assumed Sales Density of New Floorspace (£/sq m) (B)	3,000	3,322	3,697	4,122	4,212
[8] Floorspace Capacity (sq m) (A)		2,652	-566	9,123	11,246
[8] Floorspace Capacity (sq m) (B)		4,420	-944	15,205	18,744

Notes

- [1] Convenience Market Share of Existing Retailers derived from Table 13a.
- [2] Market Share = turnover of existing retailers/total available expenditure
- [3] Turnover of Existing Retailers derived from Table 13a.
- [4] = [1] - [3]
- [5] Commitments derived from Table 14b.
- [6] = [4] - [5]
- [7] Assumed Sales Density of New Floorspace a WYG Assumption
- [8] = [6] - [7]

2012 Prices

Table 19: Estimated (Baseline) Global Comparison Floorspace Capacity in Luton (Increased Market Share)

	2015	2020	2025	2030	2031
[1] Available Comparison Goods Expenditure (£m)	425.5	502.0	730.6	894.5	932.0
[2] Market Share in 2015 (%)	36	36	43	43	43
[3] Turnover of Existing (£m)	425.5	471.1	524.3	584.5	597.4
[4] Residual Expenditure (£m)	0.0	30.9	206.4	310.0	334.6
[5] Commitments (£m)	14.6	16.2	95.1	106.0	108.4
[6] Residual Expenditure (£m)	-14.6	14.7	111.3	203.9	226.3
[7] Assumed Sales Density of New Floorspace (£/sq m) (A)	5,000	5,537	6,161	6,869	7,020
[7] Assumed Sales Density of New Floorspace (£/sq m) (B)	3,000	3,322	3,697	4,122	4,212
[8] Floorspace Capacity (sq m) (A)		2,652	18,057	29,690	32,229
[8] Floorspace Capacity (sq m) (B)		4,420	30,096	49,483	53,715

Notes

[1] Convenience Market Share of Existing Retailers derived from Table 13a.

[2] Market Share = turnover of existing retailers/total available expenditure

[3] Turnover of Existing Retailers derived from Table 13a.

[4] = [1] - [3]

[5] Commitments derived from Table 14b.

[6] = [4] - [5]

[7] Assumed Sales Density of New Floorspace a WYG Assumption

[8] = [6] - [7]

Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 12.1 Addendum (Oct 2014)






2012 Prices



Appendix 5 – Opportunity Site Plans



Key

-  Opportunity Sites
-  Town Centre Shopping Area S1
-  Premier Shopping Frontage S2
-  Primary Shopping Frontage S2
-  Secondary Shopping Frontage S2

Northern Gateway Site

Power Court

0 50 100 200 300 m

1:5,000 @A3 Do not scale from this drawing



A076628

September 2012

A076628_Luton Opportunity Sites.mxd

5th Floor, Longcross Court, 47 Newport Road, Cardiff CF24 0AD
Tel: +44 (0) 29 2082 9200 Fax: +44 (0) 29 2045 5321
Email: info@wyg.com www.wyg.com

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