The information in this document has been used to support the preparation of the Local Plan. If you need assistance reading this document, or require it in a different format, please contact us via [email planning.policy@leicester.gov.uk](mailto:planning.policy@leicester.gov.uk) or call on 0116 454 0085.

Appendix 4

Leicester City Centre

Description

Leicester city centre is the main hub of retail and service uses in the administrative area, with Highcross Shopping Centre being a principal focus for comparison retailing in the north west of the centre, with associated leisure uses such as the Showcase de Lux and a range of food and beverage operators. The centre spreads east towards Haymarket from Highcross and south towards the market, the Cathedral and the King Richard III Visitor Centre. It comprises a range of uses which are typical for the nature and scale of the city centre, and performs a key role in meeting residents and visitor's needs, particularly focused on the comparison, leisure and service sector. This healthcheck has focused on the area defined by Experian Goad as the city centre, which is an area largely contiguous with the 'central shopping core'. Whilst it is acknowledged that this area differs from the defined 'city centre' area, this healthcheck uses the term 'city centre' to refer to the extent of the city centre defined by Experian Goad.

The centre is broadly bound by the A594, with the Leicester railway station directly to the east beyond the ringroad, the Leicester Royal Infirmary and De Montfort University to the west and commercial and residential areas to the north. Saint George's Retail Park is situated to the east of the city centre, beyond the A594, which includes a range of large format retail and leisure operators including Aldi, Home Bargains and Ninja Warrior UK. To the west is the River Soar which runs alongside De Montfort University and the Tesco Superstore lies to the west of the river.

The central area of the city centre is characterised by its many larger format stores which are principally accommodated by national multiple operators such as Sports Direct, Iceland, Next, Marks and Spencer, Superdrug, Waterstones and so on. East Gates is the point where a number of radial roads meet and is the location of Leicester's famous clock tower, which marks the importance of this location. At the time of our survey, works to the public realm around the Clock Tower were being undertaken, and the area was busy.

Directly to the east of the clock tower is Haymarket Shopping Centre which includes a range of comparison and convenience operators, focusing more on the discount variety and convenience operators. One of the busiest areas within the city centre is the largely pedestrianised sections of Humberstone Gate, High Street, East Gates and Gallowtree Gate. Humberstone Gate and High Street form a main pedestrian thoroughfare running east to west through the city centre.

To the south of High Street is St Martin's Square shopping centre and the surrounding lanes which follow the city's historic street layout provide a concentration of largely independent retailers, cafes, bars and restaurants. The pedestrianised focus around this area creates a safe and welcoming environment and has been further developed through the range of outdoor seating options brought forward principally as a direct result of the lockdown and social distancing measures.

To the south of St Martin's Square is Leicester's large outdoor market. The market is open six days a week, Monday to Saturday, and provides over 300 stalls offering a diverse range of food produce and comparison goods, such as clothing, footwear, bags, jewellery and household products. The market also includes a Food Hall which is open Monday to Saturday and in 2017, the market introduced a new outdoor space for events, activities and speciality markets.

Experian Goad data indicates that Leicester city centre (as defined by Experian Goad) accommodates 292,590 sq.m of gross floorspace across 1,099 units. The Experian Goad data was updated by Nexus Planning through a survey of the centre undertaken in June 2021.

Figure 1: Humberstone Gate

Figure 2: Loseby Lane

Figure 3: Horsefair Street

Figure 4: Cheapside

Figure 5: Examples of Street Furniture

Figure 6: Gallowtree Gate

Figure 7: Townhall Square

Figure 8: Market Street

Table 1 City Centre Floorspace Composition

GOAD Category	Floorspace at 2021 (sq.m)	Floorspace at 2021 (%)	Floorspace UK Average at 2021 (%)	Floorspace at 2014 (%)
Comparison	94,750	32.4%	31.4%	41.6%
Convenience	16,550	5.7%	15.4%	6.5%
Financial	16,380	5.6%	7.0%	7.0%
Leisure	82,250	28.1%	25.7%	26.6%
Retail Service	15,200	5.2%	7.2%	4.6%
Vacant	67,460	23.1%	12.8%	13.7%
TOTAL	**292,590**	**100**	**100**	**100**

Source: Composition of City Centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of June 2021; UK Average from Experian Goad Report July 2021

Table 2 City Centre Unit Composition

GOAD Category	Units at 2021	Units at 2021 (%)	Units UK Average at 2021 (%)	Units at 2014 (%)
Comparison	288	26.2%	27.4%	35.1%
Convenience	78	7.1%	9.1%	7.3%
Financial	79	7.2%	9.2%	8.8%
Leisure	280	25.5%	24.5%	24.7%
Retail Service	131	11.9%	15.6%	10.9%
Vacant	243	22.1%	13.9%	13.2%
TOTAL	**1,099**	**100**	**100**	**100**

Source: Leicester City Centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of June 2021; UK Average from Experian Goad Report July 2021

Table 3 Major Retailers Present

Debenhams	0	-
House of Fraser	0	-
John Lewis	1	✓
Marks & Spencer	1	✗

Argos	1	✗
Boots the Chemist	1	✓
TKMaxx	1	✗
W H Smith	1	✗
Wilko	1	✗

Sainsbury's	1	✗
Tesco	1	✗
Waitrose	0	-

Burton	0	✗
Dorothy Perkins	0	✗
H&M	1	✓
Monsoon Accessorize	0	✗
New Look	1	✓
Next	1	✓
Primark	1	✗
River Island	1	✓
Topman	0	✗
Topshop	0	✗

Carphone Warehouse	0	✗
Clarks	1	✓
Clintons	1	✓
EE	1	✗
HMV	1	✗
02	1	✓
Superdrug	1	✗
Vodafone	1	✓
Waterstones	1	✓

Source: Composition of Leicester City Centre derived from Nexus Planning Survey of June 2021; Major retailers are the 30 operators identified by Experian Goad as being the most likely to improve the appeal of a centre. ✓ or ✗ relates to whether retailer is located Highcross Shopping Centre

Convenience & Comparison

Leicester city centre is dominated by convenience and comparison floorspace, with a combined total of 111,300 sq.m of retail floorspace equating to a total of 38.1% of the total commercial floorspace in the city centre.

The comparison retail offer in the city centre is largely similar to the national average, with comparison operators accounting for approximately 94,750 sq.m of floorspace in the city centre. This figure equates to 32.4% of total retail floorspace in the centre compared to the national average floorspace for comparison goods at 31.4%. There are 288 comparison goods units within the city centre, a figure which represents a decline from the 381, or 32.5% of comparison goods units recorded at the time of the previous survey in 2014. This shows that the higher than average comparison offering noted at that time has been reduced, with increased diversification of other uses and an increase in vacant units.

The city centre is well-represented by a range and diversity of national comparison goods multiples, which may be helped by the influence of Highcross Shopping Centre in particular, and to a lesser extent Haymarket Shopping Centre. Highcross is anchored by operators including John Lewis and Marks & Spencer and a number of major national multiples, including Next, Boots, Matalan Clearance, Primark and New Look, are also located elsewhere within the city centre. The fashion-based retailers and are largely concentrated either in the Highcross Shopping Centre or on major routes within the vicinity of the centre.

The range of non-fashion comparison retailers in Leicester at the time of our visit was also considered to be diverse. Specialist retailers such as HMV, WH Smith, Clintons and Superdrug have a strong presence in the city centre, as do national multiples such as Poundstretcher, Wilko and Argos. This demonstrates that there is a broad diversity of retailers in the city centre, including high-end specialist retailers and value/lower-end retailers.

In light of the above and despite the decrease in total comparison units in the city centre in the period since the previous study, there remains a strong diversity of operators and units.

There were 78 convenience units within the survey area at the time of our site visits, a figure which equates to approximately 16,550 sq.m of floorspace, or 5.7% of total retail floorspace in the centre. This figure is somewhat below the UK average floorspace of 15.4% but is not unusual in respect of city centre floorspace composition and is indicative of the strength of the competing edge and out-of-centre convenience retail offer.

The convenience retail units offer a range of shops including fishmongers, bakers, grocers and frozen foods. There are Sainsbury's and Tesco Metro convenience stores located within the city centre. Other operators include Iceland frozen foods specialist, as well as a number of smaller convenience stores and newsagents, health food stores, delicatessens and tobacconists.
The convenience offering is currently added to by the presence of the city centre market, which provides for a range of smaller independent convenience retailers, including butchers, delis and fishmongers.

The comparison and convenience retail offering is strong and diverse. The floorspace occupied by comparison operators is broadly in line with national averages, and although the convenience offer is below the national average, residents do have good access to larger foodstores within proximity of the city centre, and access to a range of smaller national multiple and independent convenience operators within the city centre itself.

The city centre offering includes a broad range of retailers, from national multiples to specialist and independent and regional operators.

Services

Services (retail, leisure and financial and business) comprise a total of 44.6% of units, and 38.9% of all floorspace in the city centre. These figures are somewhat less than the national average for services units and floorspace, at 49.3% and 39.9% respectively.

There are 280 individual leisure service units within the city centre, accounting for approximately 82,250 sq.m of floorspace or 28.1% of total retail floorspace in the centre. This figure is slightly higher than the national average of leisure service floorspace of 25.7%. The leisure service offering within the city centre is diverse and reflects Leicester's role as a regional centre.

It includes a range of restaurants and food outlets, including national operators such as Nando's, TGI Fridays and Subway, a number of public houses, bars, nightclubs and cafés. A number of key national multiple restaurants including Bill's, Pho, Pizza Express, Yo! Sushi and Tim Hortons are all located within or on the vicinity of Highcross Shopping Centre along Bath House Lane, which is a key leisure area within the city centre.

Furthermore the city centre includes a number of theatres and cinemas such as the Curve Theatre and the Little Theatre and the Showcase Cinema.

The number of retail service operators is considered appropriate to the serve the needs of Leicester city centre. There are a total of 131 individual retail service units within the centre, accounting for approximately 15,200 sq.m of floorspace, or 5.2% of total floorspace in the centre. This figure is below the national average figure of retail service floorspace, which is 7.2%.

There are number of hairdressers and beauty salons, including regional operators like the Cutting Room and Kieran Mullin, alongside travel agents such as TUI and Thomas Cook. Retail service operators are found throughout the city centre. There are also a number of smaller kiosks operating in Highcross Shopping Centre providing retail services. Financial and business services account for approximately 16,380 sq.m of floorspace or 5.6% of total floorspace in the centre.

Vacancies

At the time of our visit there were 243 vacant units noted throughout Leicester city centre. These units account for approximately 67,460 sq.m of floorspace. This figure amounts to 23.1% of total retail floorspace within the survey area. The vacancy rate of units of 22.1% represents a higher proportion of vacant floorspace in Leicester city centre than the national average figure of 13.9%. At the time of the previous study in 2014, there were 144 vacant units noted within Leicester city centre, a figure which represented 13.2% of all units in the city centre. As such, the vacancy rate in terms of both units and floorspace has increased since the previous study in 2014.

The higher figures for vacant units and floorspace represents some cause for concern. The vacant units vary in terms of location and size, and the total includes few of the larger units in the centre. The largest vacant units identified in the centre at the time of the Nexus survey is the former Debenhams unit in Highcross Shopping Centre. However, the owner of the unit has revealed plans to convert the former retail unit into a high quality residential-led development, which would have a positive impact in terms of vacancy rates in the centre and in terms of ensuring the future long term use of an otherwise underused department store.

Although there were a few vacancies noted within Highcross, these were less pronounced than those throughout the rest of the centre. The success of Highcross and its attractiveness for national multiples has clearly had an impact on the remaining primary frontages in the city. Vacancies are spread across the city centre, although there are a lesser proportion within Highcross Shopping Centre, and higher proportions to the south around Market Street. However, the largest unit – the former Debenhams unit – is subject to redevelopment plans by the owner, indicating a positive investor confidence in the city centre as a whole.

It was encouraging to note that at the time of our visit a number of units were noted as being under alteration or are in the process of being refurbished. These units were located throughout the city centre and indicates positive improvements in the centre.

The vacancy rates do present some cause for concern, particularly in areas of the city centre where vacant units are concentrated. Therefore ongoing monitoring should occur to the vacancy rates in the three broad areas noted above.

Miscellaneous
Leicester City Centre provides a number of civic functions and services for the wider city and surrounding areas. Within the survey area there are a number of community facilities, including a library, a number of places of worship, Council offices, general offices and emergency services.

Pedestrian Flows
There is a particular concentration of pedestrian activity around East Gate and the Clock Tower. This is a natural focal point, being positioned directly between key retail destinations including the Market and both Highcross and Haymarket shopping centres, and there is a real desire line towards this area from the key retail and leisure areas of the city centre. In this regard, the pedestrianised streets of High Street, Humberstone Gate and Gallowtree Gate each connect with East Gates close to the Clock Tower.

To the north of the Clock Tower, activity is also particularly strong along Haymarket but quickly dissipates further along East Gates. A similar pattern of activity is seen on Churchgate; whilst its southern end occupies a prime location in terms of levels of pedestrian movement, the street experiences notably lower levels of pedestrian traffic the further north one travels.

The quality and range of major high street retailers on offer within the Highcross shopping centre serves as the focus for comparison (particularly fashion) shopping in the western half of the city centre, and therefore an overall increase in footfall. There are periphery areas of the city centre where footfall is noticeably less, and this has wider implications in terms of perceptions of safety, particularly within the evening.

Accessibility
The accessibility of a centre is determined by the ease and convenience of access by a choice of means of travel, and the city centre is provided for well by a range of public transport modes, along with opportunities to park if travelling by private vehicle. The centre is also accessible by foot from surrounding residential areas, meeting the day-to-day retail, leisure and service requirements of the local catchment.

The railway station and bus station are both within walking distance of the primary areas of the city centre, with a number of public and privately owned car parks scattered throughout the centre. Pedestrian movement is encouraged through the inclusion of pedestrian only streets, which includes an overall good level of disabled access throughout the centre. At the time of our survey we did notice a number of ongoing highways and footpath works and some instances where crossings and dropped kerbs could be better positioned to help assist disabled access.

The railway station is located to the south-east of the city centre and, within walking distance of the principal commercial areas. There is long-stay car park to the north-west of the station and the main pick-up and drop-off point, as well as the station's bus stops, are located on London Road. Leicester is a regional rail destination and is a stopping point for express services to London, Birmingham and Sheffield. There are also direct hourly services to several local destinations, including Syston, Sileby, Barrow-on-Soar, Loughborough, South Wigston, Narborough and Hinckley.

The city centre has two principal bus interchanges, Haymarket bus station and St Margaret's bus station, both of which are located in the northern half of the city centre. When open, St Margaret's serves Intercity and National Services as well as the Local Arriva Bus company. However, the bus station is temporarily closed whilst the old building is demolished and redevelopment by a replacements energy efficient building which is set to be the first carbon neutral bus station in the UK.

Haymarket provides local services and predominantly serves the First Bus company. The more central terminal is the Haymarket bus station, which is currently undergoing a major redevelopment to provide increased bus capacity in a new bus station with public realm improvements. The redevelopment of the bus station was completed in 2015 and opened in 2016, providing an attractive and modern terminal that is well positioned to provide convenient access to the heart of the city centre, particularly the principal shopping streets.

The city centre is served by a number of car parks, both connected with specific facilities and destinations, and surface level car parks. Duration and cost of parking varies throughout the centre, but overall, car parking is accessible and affordable, and there is a good range for visitors in the city centre.

In general, Leicester city centre is accessible to pedestrians, with significant provision of pedestrianised areas throughout the centre. Public transport is also readily available, providing connections at various points in the city centre to areas throughout Leicester and beyond.

Perception of Safety

Although the perception of safety varies throughout Leicester city centre, the perception of crime was generally perceived as low at the time of our visit.

The primary retail areas, particularly around Highcross and the principal streets throughout the city centre, are considered to contain few opportunities to commit a crime. They are generally busy, with high levels of pedestrian footfall throughout these areas and a good provision of active frontages, which assist with deterring crime. This activity brings with it associated high levels of natural and passive surveillance. These areas also show a high provision of street lighting and visible CCTV, thereby ensuring security and safety is achieved at all times.

In May 2021, there were a total of 636 crimes recorded within the city ward which increased from 540 in April 2021, and from 353 in May 2020 (ukcrimestats.com). The principal type of crime recorded were violent crimes at 220, within 23 shoplifting crimes, 44 other theft crimes and 33 bike theft crimes.

The perception of safety deteriorates as you move into some of the peripheral areas of the centre, where natural surveillance is less and footfall drops. In these areas in particular, consideration should be given to how increased footfall can be achieved, through measures such as reducing the number of vacant units and sites in secondary areas, to ensure more activity in these areas. This would also see further benefits such as improved environmental quality in the secondary areas. There may be opportunities for some 'meanwhile' uses to encourage footfall.

Environmental

The environmental quality of Leicester city centre is varied but is generally good and the overall appearance of the city centre is positive, although there exists the potential to improve the centre's current appearance.

Quality

The environmental quality of Leicester city centre is varied, but is generally good and the overall appearance of the city centre is positive, although there exists the potential to improve the centre's current appearance.

The principal areas of high environmental quality are focussed around Highcross and St Martin's Square, with attractive shop fronts, street furniture and very little litter or graffiti present. Further enhancements to shopfronts were also present throughout the city centre, with redevelopment and refurbishment schemes helping to enhance the environmental quality in some of the secondary areas.

In terms of greenspaces within the city centre, there are some attractive areas where visitors are able to sit and enjoy their surroundings, including the Town Hall Square Fountain, Jubilee Square and outside the Cathedral. Just outside of the ring road to the west is Castle Park. There are some areas of a poorer environmental quality, principally focussed on the streets surrounding the market (but not St. Martin's Square). Such roads include Cheapside, Angel Gateway, Victoria Parade and Market Place. However it is noted that as part of the wider Market redevelopment improvements to these areas are planned.

Overall the environmental quality of the primary areas of the city centre is good, with most areas being well-maintained and little litter or graffiti noted at the time of our visit. The secondary areas, which tend to be largely secluded, are of extremely poor environmental quality. These are poorly maintained areas, with lower quality operators and units.

Conclusions

Leicester city centre has a key regional role and is a centre that is capable of drawing customers and visitors from an extensive catchment area. The range and diversity of the convenience and comparison goods offer is comprehensive, and the Highcross shopping centre located in the north-west of the centre is a clear focus for national multiple operators.

The comparison and convenience retail offering is strong and diverse. The floorspace occupied by comparison and convenience operators is broadly in line with national averages, and convenience floorspace divergence can be readily explained by the strength of competing retail offerings throughout the wider city. The city centre offering includes a broad range of retailers, from national multiples to specialist and independent and regional operators.

The vacancy rate in terms of both proportion of units and floorspace within the centre is above the national average and it has increased significantly since the last retail study in 2014. Vacancies are spread across the city centre, although there are a lesser proportion within Highcross Shopping Centre, and higher proportions to the south around Market Street. However, the largest unit – the former Debenhams unit – is subject to redevelopment plans by the owner, indicating a positive investor confidence in the city centre as a whole.

As part of the city centre analysis and in order to help formulate the recommendations within this Study, key city centre stakeholders were also asked for their views in terms of the positives and weaknesses of the centre, whether they thought the city centre could 'bounce back' from the impact of Covid, along with general considerations in terms of the future of the city centre, including any potential threats.

A number of comments raised by the stakeholders relate to the positive implications the wider work currently being undertaken in the city centre has on its overarching vitality and viability, including the improvements being made to the public realm. Stakeholders consider that a key element of the city centre's attraction to shoppers is its accessibility, opportunity to move safely and freely throughout and its overarching offer of retail and leisure facilities. However, stakeholders do note that there are elements of anti-social behaviour and specific areas of the city centre which continue to struggle from both an aesthetic and filling vacant units perspective, all of which do detract from the city centre's offer to some degree.

Furthermore, whilst there is an acceptance that retail is and will continue to be a key element of the overall offer of the city centre, the stakeholders recognise the importance of diversifying the offer further in attracting shoppers back. Such suggestions include introducing new family-orientated leisure uses, seeking to encourage more independent operators into empty units and encouraging further city centre living.

However, overall, stakeholders consider that due to the unique nature of the city centre, particularly when considered alongside the likes of Fosse Park, it has a real opportunity to bounce back following the lockdowns associated with the pandemic. Furthermore, because of its diversity and areas such as the Cathedral Quarter and St. Martins Square, the city centre provides a qualitatively different offer which extends dwell times and encourages linked-trips. Stakeholders consider a key priority will be to ensure that empty units, and particularly large empty units, do not remain vacant for a prolonged period of time, and to encourage activity throughout the city centre during both the day and night through the encouragement of festivals, events and pop-up markets.

In general, Leicester city centre is accessible to pedestrians, with significant provision of pedestrianised areas throughout the centre. Public transport is also readily available, providing connections at various points in the city centre to areas throughout Leicester and beyond. Notwithstanding this, Leicester is a largely attractive centre whose diverse cultural offer is considered likely to drive footfall throughout the day and into the evening. Despite a noted increase in vacancies since the previous study, the centre is considered to be vital and viable.