
4. Kettering

- 4.1 Kettering is defined as a 'Growth Town' in the Adopted North Northamptonshire Core Spatial Strategy (2008), along with Corby and Wellingborough. It is described as the 'main retail centre' and a 'potential strong sub-regional centre'.
- 4.2 The adopted Kettering Town Centre Area Action Plan (2011) and accompanying Proposals Map define the town centre boundary, primary shopping area, primary/secondary/restaurant quarter frontages and shopping quarter sites. The AAP also allocates a number of sites for development as part of the defined Shopping Quarter (SHQ) and Retail Quarter (RQ).
- 4.3 The core of the centre is the High Street/Gold Street which runs from the Market Place in the south to the junction with Victoria Street in the north east. It is almost entirely pedestrianised. Silver Street/Horsemarket runs parallel to the High Street and is defined as part of the secondary shopping area, as is part of Sheep Street to the south and Pockingham Road to the north and Montague street to the east. At the southern end of the High Street is Market Place, which is identified as a restaurant quarter.
- 4.4 The primary retail focus in the centre is Newlands Shopping Centre, which is located at the northern end of the town centre off Gold Street. The centre originally opened in 1978. It was acquired in October 2003 by new owners (Ellandi) who extended the centre to the north to accommodate a new anchor unit of a new anchor unit of circa 17,658 sqm (FOCUS) which now occupied by TK Maxx.
- 4.5 Kettering also has extensive provision of out of centre shopping facilities, including a number of retail parks, stand alone stores, and out of centre foodstores, many of which sell an element of comparison goods. The major retail parks comprise the following:
- **Kettering Retail Park** is located off Carina Road. It comprises circa 8,140 sqm and occupiers include Curry's, Argos, Next, Laura Ashley, Bensons for Beds, Aldi, Pizza Hut and Nandos;
 - **Northfield Retail Park** is located off Northfield Avenue of the junction with Rothwell Road. It is 3,480 sqm and occupiers include Halfords, Dreams, Discount UK and

Sportsdirect.com. It is adjacent to a newly constructed 5,575 sqm stand-alone Wickes;

- **Belgrave Retail Park** is located north of Northfield Retail Park on the former Telegraph Park site. This circa 3,600 sqm retail park opened in 2009 and occupiers include PC World, Comet, and Maplin. To the north of Belgrave Retail Park is a standalone Dunelm Mill which received planning permission in 2010 and opened in autumn 2012.
- **Tanners Gate Retail Park** is located south of Northall Street, directly north of the primary shopping area. It includes a Pets at Home, Farmfoods, Blockbuster, the Wholesale Kitchen Company and Fit4less gym.
- **Telford Way Industrial Estate** is located west of the junction between the A14 and A43. It is comprised of mostly industrial uses but also accommodates a number of bulky goods retailers and trade counters.

4.6 There are also a number of large out-of-centre foodstores in the area which sell an element of comparison goods, including a 5,783 sqm (net) Tesco store on Carina Way and Asda which opened a new store on Northfield Avenue in October 2010 replacing a former Co-Op.

Diversity of Uses

4.7 According to the most recent Experian Summary Report (December 2012), Kettering town centre comprises 346 outlets, trading from a total of 74,562 sqm (gross) floorspace.

4.8 Table 4.1 below provides a detailed breakdown of the diversity of uses in the centre between 2003 and 2011 based on outlet data. All data is derived from Experian Summary Reports and therefore directly comparable over time.

Table 4.1 Kettering Town Centre Diversity of Uses, 2003 – 2012 (outlet count)

	November 2003	June 2009	December 2012	GB Average (%)	Change (%), 2003-12
Convenience	21 (6.4%)	21 (6.2%)	21 (6.1%)	8.6%	Nil
Comparison	172 (52.8%)	155 (45.6%)	147 (42.5%)	40.9%	-14.5%
Retail Services	25 (7.7%)	28 (8.2%)	42 (12.1%)	11.1%	68.0%
Leisure Services	26 (8.0%)	39 (11.5%)	40 (11.6%)	16.1%	53.8%
Business Services	34 (10.4%)	34 (10.0%)	38 (11.0%)	8.6%	11.8%
Miscellaneous	12 (3.7%)	6 (1.8%)	7 (2.0%)	1.1%	-41.7%
Vacant	36 (11.0%)	57 (16.8%)	51 (14.7%)	13.7%	41.7%
TOTAL	326	340	346	100%	

Source: 2005 and 2009 data from North Northamptonshire Retail Studies. Data from 2012 and GB Average from Experian Goad Summary Report (December 2011).

- 4.9 As shown in Table 4.1, there has been a marked decrease in the number of comparison goods units in the town centre between 2003 and 2012. Comparison goods outlets have decreased from 172 units in 2003 to 147 units in 2012, a drop of 14.5%. Nevertheless, comparison units still account for 42.5% of total units, which is slightly higher than the national average of 40.9%.
- 4.10 Retail, leisure and business services in the centre have increased from 85 units in 2003 to 120 units in 2012, an increase of 41.2%. These uses currently account for 34.8% of total units, which is marginally below the national average of 35.8%.
- 4.11 The Kettering AAP includes a number of development control policies guiding the concentration and split between uses in various areas in the town centre. For instance, Policy 13 requires that not less than 75% of frontages in the Primary Shopping Area are in A1 use.
- 4.12 To monitor progress against these benchmarks, Kettering Borough Council have started to produce an annual Health Check Update of Kettering. The latest report shows that since 2009 there has been a slight decrease in the percentage of A1 units within the Primary Shopping Frontages, which now falls just under the 75% threshold. The Health Check Update also shows that there was a decline in the percentage of A1 frontages in secondary shopping frontages between 2009, dropping from 46% to around 40%.

Economic Activity

Vacancies

- 4.13 Table 4.1 above shows that the number of vacancies in the centre has risen from 36 in 2003 to 51 in 2012, an increase of 41.7%. According to the most recent Goad report, vacancies account for 14.7% of total town centre units, which is above the national average of 13.7%. There also appears to be a cluster of vacancies at the southern end of the High Street, around Horsemarket.
- 4.14 The latest Co-Star search identifies 40 units in the town centre which are currently for sale or lease (9 of which are in Newlands Shopping Centre), which range in size from between 22 and 309 sqm (net). It is not clear the reason for the discrepancy between Goad vacancy data and Focus data. However it may be that there has been an increase in take up rates since the Goad 2012 survey. Although Focus data should not be used as a definitive list of availability, it provides a broad indication of the size of units available.

Market Share of Available Expenditure

- 4.15 As stated above, the share of total expenditure which Kettering attracts from its catchment area is an important benchmark of the success and attraction of it as a town centre.
- 4.16 The household survey results of the North Northamptonshire Retail Studies of 2005 and 2010 have been assessed in order to compare changes in Kettering's retention of comparison goods expenditure from within the NNCA over time.

Table 4.2 Comparison Goods Market Shares Across NNCA, Kettering 2005 & 2010

	2005	2010	Change (% pts)	Change (%)
Town Centre	19.8%	14.1%	-5.7	-29%
Retail parks	2.8%	7.2%	4.5	163%
Foodstores	0.8%	2.2%	1.4	164%
Total	23.4%	23.5%	0.1	1%

Source: North Northamptonshire Retail Study 2005 and 2011.

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- 4.17 As shown above in Table 4.2, the market share of comparison goods expenditure retained by Kettering town centre has decreased from 19.8% in 2005 to 14.1% in 2010, a drop of almost 30%. This reduction corresponds with a significant increase in the market share of comparison expenditure retained by both out-of-centre retail parks and foodstores in Kettering and corresponds with the development and opening of new out of centre retail facilities on Northfield Avenue Retail Park, which itself accounts for 3.0% of total market share in 2010.
- 4.18 Overall, there has been little change in Kettering's overall retention of comparison goods expenditure, indicating that new out-of-centre floorspace has resulted in a diversion of activity from the town centre rather than claw back of comparison goods expenditure which is otherwise lost to competing destinations outside of the area.
- 4.19 This is consistent with the findings of the 2012 Retail Study Update, which found that since 2005 there has been "*reduction in the popularity of Kettering and Northampton town centres as comparison shopping destinations and a corresponding increase in the popularity of out-of-town shopping in each of the three growth towns*" (paragraph 2.10). As a result, the study concluded that there was a pressing need for modern, large units in Kettering town centre in order to reverse the decline in Kettering's market share from the catchment area.

Retailer Demand

- 4.20 As of April 2013, there were three published requirements for retailer representation in Kettering. These were for:
- 9 – 46 sqm for Hatton Goldsmiths
 - 279 – 465 sqm for Tragus restaurant chains (such as Café Rouge, Bella Italia and Strada)and
 - 74 – 139 sqm for Age UK.
- 4.21 To provide some context, the 2006 Retail Study reported that there were 21 outstanding operator requirements in Kettering as of June 2006. Of these, 13 operators were interested in locating in prime areas of Kettering town centre, the most prominent of which were TK Maxx (who subsequently occupied the developed unit in Newlands) and Debenhams.

Investment

- 4.22 Around £10m of external funding has been invested in Kettering town centre in recent years. Significant environmental improvements have already taken place at Market Place, which have helped to improve this previously underutilised area of the town and set the framework from which it can develop into a new restaurant zone. Further regeneration is planned in order to help develop distinctive areas for new restaurants, shops, offices and leisure areas in the centre.
- 4.23 Private investment has also taken place, with the former Hogs Head pub on Queen Street and Horsemarket receiving permission for a new 45 bed hotel.

Opportunity Sites

- 4.24 The Core Strategy sets out a requirement for Corby to accommodate at least 20,500 sqm (net) of comparison goods floorspace by the end of the plan period (Policy 12).
- 4.25 The Kettering Town Centre AAP (2011) allocates a number of sites to accommodate this identified need, including:
- **SHQ1** – a large site on the High Street which currently accommodates some existing units as well as the Wadcroft/Commercial Road Pay and Display car park. This site is allocated for around 16,000 sqm (net) of additional comparison goods floorspace; and
 - **SHQ4, SHQ5 and SHQ6** - a collection of sites opposite Sainsbury's which currently accommodates Tanners Retail Park and the Iceland customer car park. This area is identified as being able to accommodate a minimum of 5,000 sqm (net) of additional retail floorspace.
- 4.26 The AAP also sets out a vision for the Yards quarter, a currently underutilised network of backland areas in the heart of the Primary Shopping Area. The AAP seeks to recreate an active and viable quarter within the core of the town centre through delivery of a collection of independent and retail units which help connect the Market Place to the primary retail pitch to the north. As part of this the AAP allocates two sites (**Y1 and Y2**) which together are identified as being able to provide 2,300 sqm (net) additional retail floorspace in the centre.

Footfall and Accessibility

- 4.27 We are not aware of any available information on pedestrian footfall in Kettering town centre. Unfortunately, the North Northamptonshire Retail Study Update (2011) did not ask questions about the method by which most people travel to undertake their shopping, so it is not possible to assess the extent to respondents used sustainable means of transport to access Kettering Town Centre.
- 4.28 With respect to wider accessibility of the centre, the railway station provides frequent, direct services to London St. Pancras in just under an hour. The mainline rail services also connect Kettering to Corby in the North, as well as Wellingborough, Bedford, and Luton in the south.
- 4.29 The town centre is pedestrianised along the High Street/Gold Street and within Newlands Shopping Centre.

7. Summary

- In **Northampton**, there has been a sharp contraction of the market share accounted for by the town centre. It now accounts for less comparison goods spend across the NNCA study area, than Corby, Kettering or Wellingborough. This indicates the potential need to continue to direct retail development here in order to safeguard its status as a Regional Town Centre;
- In **Corby**, there has been an increase in the town centre's retention of comparison goods market share, which correlates with significant town centre investment including the development of the new Willow Shopping Centre and the opening of the railway station in 2009.
- In **Kettering** there has been significant out of centre retail warehouse development, which correlates to 5.8 percentage point increase in the retention of out of centre facilities. However this has been virtually matched by a 5.7 percentage point decline in the market share retained by Kettering town centre. Overall, there has been little change in Kettering's overall retention of comparison goods expenditure.
- **Wellingborough** has particularly suffered from the polarisation of retail activity. There has been an increase in vacancies, decrease in retailer demand, and a reduction in the retention of comparison goods shopping. Recent public realm improvements and town centre marketing initiatives have made some positive impact. However, it is considered that delivery of new retail facilities on allocated town centre sites is necessary in order to boost regeneration, and this centre is particularly vulnerable.
- **Rushden** appears to have benefitted significantly by the opening of the Asda on Washbrook Road and, potentially, recent public improvements which have been completed in the town centre. Although it retains the lowest percentage of comparison goods market share from within the NNCA, this has grown significantly since 2005 and in any case is to be expected given its lower status in the retail hierarchy. Rushden is also the only centre which has a vacancy rate (based on outlets) which is below the national average, and is performing well for a centre of its size and role.

NORTHAMPTON RETAILER REQUIREMENTS (APRIL 2013)

No	Retailer	From sqm	To sqm	Use Class
1	Cosmo Restaurants	743	1,858	A3
2	Costa Coffee	0	1,850	All
3	Carpets 4 Less	325	929	All
4	Mattressman	279	557	A1
5	Chiquito	344	465	A3
6	Blue Apple	74	344	All
7	Raw	74	325	All
8	H&D Fashionista LTD	74	279	A1
9	Linens Direct UK Ltd	186	279	A1
10	Savers Health and Beauty	163	232	A1
11	Kitchen Gallery	163	232	A1
12	Bargain Book Time	93	232	A1
13	The Works Retail Limited	186	232	All
14	Roosters Piri Piri	93	186	All
15	Paper Kisses	46	139	A1
16	Oakham Ltd	93	139	A2
17	Caffe Nero Group Ltd	93	139	A3
18	Johnsons Cleaners UK Ltd	93	139	All
19	Age UK	74	139	All
20	Solutions Inc	93	139	All
21	Warren James Jewellers	74	111	A1
22	Simply Eat	56	93	All
23	GNC	60	79	A1
24	Hatton Goldsmiths	9	46	All
25	Millies Cookies	28	46	All
	TOTAL	3,516	9,213	

Source: Focus, 2013

CORBY RETAILER REQUIREMENTS (APRIL 2013)

No	Retailer	From sqm	To sqm	Use Class
1	Hatton Goldsmiths	9	46	All
2	Ann Summers	111	232	All
	TOTAL	121	279	

Source: Focus, 2013

KETTERING RETAILER REQUIREMENTS (APRIL 2013)

No	Retailer	From sqm	To sqm	Use Class
1	Hatton Goldsmiths	9	46	All
2	Tragus	279	465	A3
3	Age UK	74	139	All
	TOTAL	362	650	

Source: Focus, 2013

WELLINGBOROUGH RETAILER REQUIREMENTS (APRIL 2013)

No	Retailer	From sqm	To sqm	Use Class
1	Monkey Mobile Ltd	28	46	All
2	Hatton Goldsmiths	9	46	All
3	Poundland Ltd	418	929	A1
4	Costa Franchisee	93	186	A1
5	Bensons For Beds	279	465	A1
6	Age UK	74	139	All
7	Mattressman	279	557	A1
	TOTAL	1,180	2,369	

Source: Focus, 2013

RUSHDEN RETAILER REQUIREMENTS (APRIL 2013)

No	Retailer	From sqm	To sqm	Use Class
1	Hatton Goldsmiths	9	46	All
2	Costa Franchisee	93	186	A1
	TOTAL	102	232	

Source: Focus, 2013