WYG Planning & Environment

part of the WYG group

Central Lincolnshire Sustainable Urban Extensions – Retail Provision Study

Central Lincolnshire Joint Planning Unit

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1.0 Introduction

Scope and Purpose

1.01 WYG Planning & Environment ('WYG') was commissioned by the Central Lincolnshire Joint Planning Unit in April 2013 to undertake an appraisal of the scale of provision which may be required to appropriately serve the shopping needs of the future population of eight planned Sustainable Urban Extensions (SUEs) in the settlements of Lincoln, Gainsborough and Sleaford. The objectives of the Study are established by the Tender Brief, dated 27 March 2013, which indicates that one of the proposed SUEs (Gainsborough Southern Neighbourhood) is already the subject of an outline planning permission. With regard to the other seven SUEs, the Central Lincolnshire Authorities of City of Lincoln Council, North Kesteven District Council and West Lindsey District Council are working with the sites' proponents and key stakeholders with a view to forming a general consensus over the form, scale and location of future development.

1.02 This study is intended to inform such discussions by providing an independent assessment of the adequacy of existing provision, its ability to serve the residents of the planned SUEs, and the need for additional facilities to provide appropriate, sustainable development. In considering future needs, it is necessary not just to consider the ability of communities within the SUEs to readily access retail and other local services of an appropriate scale and function, but also to ensure the appropriate integration of the urban extensions with the built up area. As a consequence, it is also necessary to consider opportunities for existing communities to benefit from the provision of additional retail and service operations where this will not result in any unacceptable impact on existing facilities.

1.03 WYG has already undertaken the Central Lincolnshire City and Town Centres Study, which reported in May 2012, on behalf of the Joint Planning Unit. The City and Town Centres Study considered the quantitative and qualitative need for additional retail floorspace in the settlements of Gainsborough, Lincoln, Market Rasen and Sleaford. The existing study is of relevance to the additional provision which may be required in association with the SUEs and, therefore, this report should be read in conjunction with the findings of the City and Town Centres Study.

Format of Report

1.04 This report briefly summarises the context for the development of the SUEs, before considering the likely population of each, the likely need for additional facilities which will arise from the estimated population, and the current adequacy of existing provision within proximity to the planned SUEs. Our report is therefore structured as follows:

- Section 2 sets out the relevant planning policy context and summarises the findings of the Central Lincolnshire City and Town Centres Study insofar as they are pertinent to the provision of additional facilities to support proposed SUEs;
- Section 3 provides our estimation of the population and convenience goods expenditure which will arise from the development of the SUEs;
- Section 4 considers the distribution of existing retail and service provision and its ability to assist in meeting future needs;
- Section 5 considers the requirements for new facilities and, in particular, retail floorspace associated with each of the SUEs; and
- Section 6 sets out our recommendations to assist in the delivery of SUEs of an appropriate form and function.

2.0 Context for the Delivery of the Proposed SUEs

2.01 In examining the relevant context to the delivery of the eight planned SUEs, we consider there to be five principal issues which merit detailed consideration. These are as follows:

- national planning policy and the requirement for all identified needs to be met in full;
- the type of provision which would need to be provided to constitute a requirement for the designation of new local or district centres;
- the local context and the requirement for SUEs to be brought forward to deliver growth;
- the findings of the Central Lincolnshire City and Town Centres Study; and
- the provisions of extant outline planning permission reference 125020.

2.02 Each of these is considered in turn below.

The National Planning Policy Framework

2.03 The Framework was published on 27 March 2012 and replaces all former Planning Policy Statements, Planning Policy Guidance Notes and some Circulars with a single consolidated document.

2.04 The main theme of the Framework is that there should be 'a presumption in favour of sustainable development', with paragraph 7 of the Framework indicating that sustainable development will have three dimensions: economic, social and environmental.

2.05 Paragraph 7 goes on to state that:

'These dimensions give rise to the planning system to perform a number of roles:

- **an economic role – contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and coordinating development requirements, including the provision of infrastructure;**

- **a social role – supporting strong, vibrant and healthy communities, by providing the supply of housing required to meet the needs of present and future generations; and by creating a high quality built environment, with accessible local services that reflect the community's needs and support its health, social and cultural well-being; and**

- **an environmental role – contributing to protecting and enhancing our natural, built and historic environment; and, as part of this, helping to improve biodiversity, use natural resources prudently, minimise waste and pollution, and mitigate and adapt to climate change including moving to a low carbon economy.'**

2.06 Paragraph 8 of the Framework indicates that economic, social and environmental gains should be sought jointly to secure sustainable development and that the planning system should play an active role in securing solutions.

2.07 Paragraph 14 indicates that, in progressing development plans, local planning authorities should positively seek opportunities to meet the development needs of their area and that development plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change.

2.08 Paragraph 17 provides a set of 12 core land-use principles which should underpin both plan-making and decision-taking. The identified principles which have greatest relevance to this study comprise the need to:

- Proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made to objectively identify and meet housing, business and other development needs of an area, and respond positively to wider opportunities for growth. Plans should take account of market signals, such as land prices and housing affordability, and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of the residential and business communities;
- Actively manage patterns of growth to make the fullest possible use of public transport, walking and cycling, and focus significant development in locations which are or can be made sustainable; and
- Take account of and support strategies to improve health, social and cultural wellbeing for all, and deliver sufficient community and cultural facilities and services to meet local needs.

2.09 Paragraph 23 seeks to promote positive and competitive centres. In drawing up development plans, local planning authorities should, *inter alia*, 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.

Definition of District and Local Centres

2.10 The NPPF fails to provide any specific definition of what will constitute either a 'district' or a 'local' centre and due to this effective policy vacuum (which we consider to likely be an oversight, rather than any purposeful attempt to remove established designations), it is therefore necessary to refer to the most recent guidance which does provide such clarification. Accordingly, we set out the full definition of local and district centres provided by (the now superseded) Planning Policy Statement 4: Planning for Sustainable Economic Growth (PPS4) below.

'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.'

'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.'

2.11 PPS4 also clarifies that small parades of shops of purely neighbourhood significance should not be regarded as defined centres.

2.12 It is evident from the above definitions that differentiation between the above two types of centre – and between designated centres and smaller aggregations of shops and services – will be made with reference to the provision of: food shopping; libraries; post offices; pharmacies; and, banks and building societies. With regard to the latter of these key attractors, we note that in recent times it has become increasingly common for smaller centres to be served by an ATM rather than by a bank and we would suggest that commercial considerations will ensure that this is almost certainly true in the case of the SUEs. Accordingly, we consider the distribution and availability of ATMs to be of relevance to the study.

2.13 We also consider GPs' surgeries to be an important local public facility which should be appropriately located in proximity to the planned SUEs, and the location of surgeries therefore also informs our approach to the commission. However, it should be noted that our consideration of GPs' surgeries is undertaken with reference only to individuals' access to such facilities from a planning and sustainability standpoint. We have not made any enquiries of either the Lincolnshire West (responsible for Gainsborough and Lincoln) or the South West Lincolnshire (responsible for Sleaford) Clinical Commissioning Groups (CCGs). Accordingly, where we find there to be justification, at least in sustainability terms, for the provision of an additional GPs' surgery, direct discussion will need to take place with the relevant CCG to determine the current capacity of existing surgeries and whether the additional dwellings to be delivered through the planned SUE are such that they merit additional services.

2.14 We consider other facilities identified in defining a local centre – such as restaurants, newsagents and launderettes – to be less essential to residents' day to day wellbeing and, in any event, such uses will often be provided in a broadly appropriate manner by the private sector when suitable premises are available. Accordingly, we do not consider the exact existing location of these facilities in undertaking this study, but do acknowledge that such facilities may well form part of any local or district centre designated in association with the delivery of the SUEs.

2.15 We use the terms 'district' and 'local' centres consistently throughout this report in order to allow direct reference to the above definitions. However, we note that the preferred terminology of the recent Central Lincolnshire Core Strategy Partial Draft Plan for Consultation: Area Policies for Lincoln, Gainsborough and Sleaford (January 2013) document is to refer to 'district' and 'neighbourhood' centres. We understand that this is to avoid confusion with the City of Lincoln Local Plan (adopted August 1998) which identifies Local Shopping Centres, some of which are quite modest in scale. It is our understanding that the JPU consider a 'neighbourhood centre' to broadly conform to the PPS4 definition of a 'local centre' and our report and its findings can therefore be interpreted on the same basis.

Context for the Establishment of SUEs

2.16 The future strategy for growth in the Central Lincolnshire area is to be set out through the Lincolnshire Core Strategy, which has been progressed in two parts, each of which has been the subject of a consultation exercise within the past 12 months. The Joint Planning Unit is currently considering responses to the consultation drafts of the Core Strategy before a Submission draft is submitted to the Secretary of State later this year. Only limited weight can currently be attributed to the draft policies of the Core Strategy for development management purposes, but they are of direct relevance to this study in setting out the authorities' current aspirations in terms of the implementation of the SUEs.

2.17 The Lincolnshire Core Strategy Partial Draft Plan for Consultation (June 2012) provides policies which are to be applied throughout the area. In doing so, it identifies the need for additional growth to be accommodated by way of the designation of eight strategic SUEs – three of which are proposed to be in Lincoln, with a further three being located in Gainsborough, and two being located in Sleaford. Paragraph 5.38 of the June 2012 Partial Draft Plan states that:

'Sustainable Urban Extensions will deliver approximately 35% of Central Lincolnshire's housing growth. The Central Lincolnshire Authorities will work together and with the site proponents to ensure that all the sites commence construction and continue to be built out in phases over the plan period and beyond. A detailed masterplan will be prepared for each site through collaborative working arrangements between the developers, the Central Lincolnshire Authorities, communities and other stakeholders who can contribute towards the delivery of exemplar sustainable development.'

2.18 Draft Policy CL7 indicates that proposals for SUEs should, *inter alia*:

- Provide a suitable mix of uses including housing, employment, green infrastructure, community facilities (including providing for sport and recreation, arts and culture and to allow for social interaction), educational facilities and district centres determined by the specific needs of the location and consideration of the impact upon existing settlements including existing City, Town and District Centres;
- Be fully integrated with the Main Settlement and with surrounding smaller settlements, creating new neighbourhoods with their identify but enhancing the opportunities and services for existing communities where appropriate;
- Provide a range of house types, sizes and tenures to meet current and future housing needs of Central Lincolnshire, 40% of which should be affordable where viable;
- Develop new communities through the establishment of appropriate measures to allow the community to shape the development, contribute to managing its long term sustainability and ensure that the development delivers appropriate opportunities for social interaction, through public buildings, open spaces and the design of new neighbourhoods;
- Deliver safe and effective access and movement, both within the development and to the City and Town centres and adjacent communities, prioritising walking, cycling and public transport whilst acknowledging that some vehicular movements are inevitable, new development will therefore also be required to provide appropriate highway infrastructure and/or improvements to the existing highway network; and
- Generate new neighbourhoods which are locally distinctive, maximise the value of heritage and natural assets and create an identity which is specific to the development but sympathetic to local character.

2.19 Draft Policy CL7 also goes on to indicate that planning applications for SUEs will be expected to be bring forward phased development as part of a comprehensive scheme and be supported by evidence which demonstrates their compliance with planning policy. As part of this, a retail impact assessment will be required to consider the implications of any proposed District Centre on the City and Town Centres and the role the new centre would fulfil in the overall retail hierarchy.

2.20 The subsequent Central Lincolnshire Core Strategy Partial Draft Plan for Consultation: Area Policies for Lincoln, Gainsborough and Sleaford document provides greater detail in terms of the likely composition, role and purpose of the eight planned SUEs, and the contribution they will make to meeting identified needs over the plan period to 2031.

2.21 In summary, the specific draft policies which support the delivery of the SUEs and the identified parameters[1] for each development are as follows:

- **Policy L8 – Lincoln Western Growth Corridor (Land at Swanpool, Fen Farm and Decoy Farm)**
  It is proposed that approximately 2,700 dwellings will be constructed over the plan period to 2031, with additional development taking place beyond that period. It is envisaged that construction will commence on site in 2015, with the SUE being built out at an initial rate of 100 to 150 dwellings per annum. Additional development will include 40 hectares of employment use (incorporating two business parks); retail, community and service uses; two on-site primary schools; and associated transport, green and other infrastructure. Policy L8 proposes two new centres to serve the needs of those living and working in the SUE.

- **Policy L9 – Lincoln South East Quadrant (Land at Canwick Heath and Bracebridge Heath)**
  Approximately 6,000 dwellings are to be delivered in total, with around 2,800 delivered in the plan period to 2031. It is expected that construction will commence on site in 2018, and that the SUE will be built out at between 100 to 150 dwellings per annum over the plan period. Additional development will include 19 hectares of employment uses including small offices, start-up premises and light industry; retail, community and service uses in the form of two new centres of an appropriate scale; two on-site primary schools; and associated transport, green and other infrastructure.

[1] We are aware that, since the publication of the Partial Draft Plan for Consultation, additional work has been undertaken in progressing proposals for the SUEs and, as such, some of the parameters identified in the Draft Plan have been revised. In particular, additional work has been undertaken in respect of the dwellings which may be appropriately accommodated at each SUE and this is reflected in Table 2.1 which follows later in this section.

- **Policy L10 – Lincoln North East Quadrant (Land at Greetwell)**
  Approximately 2,000 dwellings are to be delivered in the period to 2031. It is expected that construction will commence on site in 2018, and that the SUE will be built out at between 100 to 150 dwellings per annum over the plan period. Additional development will include 6 hectares of employment uses including small offices, start-up premises and light industry; retail, community and service uses in the form of a new centre of an appropriate scale; an on-site primary school; and associated transport, green and other infrastructure.

- **Policy G7 – Gainsborough Southern Neighbourhood (Land South of Foxby Lane)**
  Approximately 2,500 dwellings are to be delivered in the period to 2031. It is expected that construction will commence on site in 2014 or 2015, and that the SUE will be built out in four phases at a rate of between 100 to 150 dwellings per annum over the plan period. A further 310 units will be built as part of a proposed neighbourhood centre which will also include retail, employment and community uses (including health and community policing). Additional development will include two on-site primary schools and associated transport, green and other infrastructure. It should be noted that the submission of the Gainsborough Southern Neighbourhood application predates the publication of the two Core Strategy Partial Draft documents and it should not be inferred that the use of the term 'neighbourhood centre' in the application documents is consistent with the JPU's use of the same term.

- **Policy G8 – Gainsborough Northern Neighbourhood (Land North of Corringham Lane and the A631)**
  Approximately 2,400 dwellings are to be delivered in the period to 2031. It is expected that construction will commence on site in 2016 or 2017, and that the SUE will be built out at a rate of between 100 to 150 dwellings per annum over the plan period. Additional development will include around 7 hectares of employment uses including accommodation for start up and small businesses; retail, community and service uses in the form of a new centre of an appropriate scale; an on-site primary school; and associated transport, green and other infrastructure.

- **Policy G9 – Gainsborough Eastern Neighbourhood (Land South of the A631 and North of Heapham Road)**
  Approximately 2,100 dwellings are to be delivered in the period to 2031. It is expected that construction will commence on site in 2017 or 2018, and that the SUE will be built out at a rate of between 100 to 150 dwellings per annum over the plan period. Additional development will

include around 7.5 hectares of employment uses including accommodation for start up and small businesses; retail, community and service uses in the form of a new centre of an appropriate scale; an on-site primary school; and associated transport, green and other infrastructure.

- **Policy S7 – Sleaford South Quadrant**
  Approximately 1,600 dwellings are to be delivered in the period to 2031. It is expected that construction will commence on site in 2013 or 2014, and that the SUE will be built out at a rate of between 100 to 150 dwellings per annum over the plan period. It is envisaged that the first phase of development would comprise up to 300 new dwellings together with a new neighbourhood centre. Additional development will include employment uses, including accommodation for start up and small businesses, and an on-site primary school.

- **Policy S8 – Sleaford West Quadrant**
  Approximately 1,750 dwellings are to be delivered in the period to 2031. It is expected that construction will commence on site in 2016 or 2017, and that the SUE will be built out at a rate of between 100 to 150 dwellings per annum over the plan period. Additional development will include a minimum of 3 hectares of employment uses (which will mainly comprise B1 uses); retail, community and service uses in the form of a new centre of an appropriate scale; and an on-site primary school.

2.22 Further work in progressing the SUEs has been undertaken subsequent to the publication of the Partial Draft Plan for Consultation. Up to date detail in respect of the total number of dwellings which could be accommodated in the SUEs is provided by the supplied Tender Brief and, accordingly, we are aware that the total number of dwellings proposed (included those which will be completed beyond the plan period) is as follows.

Table 2.1: Proposed Number of Residential Dwellings in Each SUE Over the Plan Period and Beyond

SUE	Proposed Dwellings at 2031	Total Proposed Dwellings
Lincoln Western Growth Corridor	2,700	3,100
Lincoln South East Quadrant	2,800	6,000
Lincoln North East Quadrant	1,400	1,400
Gainsborough Southern Neighbourhood	2,500	2,500
Gainsborough Northern Neighbourhood	2,400	2,400
Gainsborough Eastern Neighbourhood	2,100	2,100
Sleaford West Quadrant	1,600	1,600
Sleaford South Quadrant	1,750	1,750
Total	**17,250**	**20,850**

Summarised Findings of the Central Lincolnshire City and Town Centres Study 2012

2.23 The future requirement for additional retail floorspace in the principal centres of Gainsborough, Lincoln, Market Rasen and Sleaford was considered by last year's Central Lincolnshire City and Town Centres Study. The identified requirement for additional convenience goods retail floorspace in the period to 2031 is of greatest relevance to the consideration of the need to provide additional facilities to serve the planned SUEs, as food retailing will typically be a key anchor of any such development. Significant comparison goods retail expenditure – whether this be purchases of clothing, household, electrical goods and so on – is often more appropriately directed to higher order retail centres.

2.24 The City and Town Centres Study considered two population growth scenarios, with 'Scenario B' broadly corresponding to the growth strategy proposed to be pursued by the Core Strategy Partial Draft for Consultation of June 2012. Accordingly, the need for additional convenience goods floorspace identified under population growth Scenario B in the settlements of Gainsborough, Lincoln and Sleaford is of relevance and is summarised below by Tables 2.2, 2.3 and 2.4.

Table 2.2: Quantitative Need for Additional Convenience Goods Floorspace in Gainsborough under 'Scenario B'

Year	Convenience Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2011	8.0	31.3	-23.3	-1,940	-4,663
2016	11.4	31.3	-19.9	-1,657	-3,983
2021	16.0	31.7	-15.7	-1,289	-3,097
2026	21.5	32.0	-10.6	-861	-2,070
2031	27.7	32.4	-4.7	-379	-910

[1] Average sales density assumed to be £12,061 per sq.m at 2011 (based on the average sales density of Asda, Morrisons, Sainsbury's, Tesco and Waitrose as identified by Verdict 2010)
[2] Average sales density assumed to be £5,000 per sq.m at 2011
In 2010 prices

Table 2.3: Quantitative Need for Additional Convenience Goods Floorspace in Lincoln under 'Scenario B'

Year	Convenience Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2011	47.9	39.7	8.3	687	1,652
2016	59.4	39.6	19.8	1,650	3,965
2021	75.5	40.2	35.3	2,902	6,974
2026	94.1	40.6	53.5	4,355	10,466
2031	115.5	41.0	74.4	5,995	14,408

[1] Average sales density assumed to be £12,061 per sq.m at 2011 (based on the average sales density of Asda, Morrisons, Sainsbury's, Tesco and Waitrose as identified by Verdict 2010)
[2] Average sales density assumed to be £5,000 per sq.m at 2011
In 2010 prices

Table 2.4: Quantitative Need for Additional Convenience Goods Floorspace in Sleaford under 'Scenario B'

Year	Convenience Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2011	17.6	17.5	0.1	6	15
2016	20.2	17.5	2.8	231	554
2021	24.1	17.7	6.4	523	1,256
2026	28.5	17.9	10.6	862	2,071
2031	33.5	18.1	15.4	1,244	2,990

[1] Average sales density assumed to be £12,061 per sq.m at 2011 (based on the average sales density of Asda, Morrisons, Sainsbury's, Tesco and Waitrose as identified by Verdict 2010)
[2] Average sales density assumed to be £5,000 per sq.m at 2011
In 2010 prices

2.25 In each of the above tables, the minimum identified floorspace requirement equates to occupation of additional convenience floorspace by one of the 'main four' supermarket operators (i.e. Asda, Morrisons, Tesco and Sainsbury's) and the maximum requirement equates to occupation by a discounter (such as Aldi or Lidl). Retailers within each of these two groups tend to have broadly comparable sales densities (this being the monetary value of goods traded from each square metre of floorspace), which reflect the fact that the turnover of floorspace occupied by a 'main four' retailer will tend to turn over more expenditure than the same quantum of floorspace occupied by a discount retailer. The two different 'minimum' and 'maximum' floorspace requirements indicate that that future convenience goods retail needs can be met by different types of retailer.

2.26 In summary and in purely quantitative terms, it is evident that at 2031 there is no need for additional convenience floorspace in Gainsborough (due to the scale of existing commitments); significant need (equating to a minimum requirement of 5,995 sq.m, equivalent to two or three additional food superstores) in Lincoln; and modest need (equating to a minimum requirement of 1,244 sq.m, equivalent to a single medium-sized supermarket) in Sleaford.

2.27 With regard to Sleaford, the City and Town Centres Study did, however, note at paragraph 8.55 that:

'...Sleaford currently has a relatively weak convenience goods offer for a town of its size and catchment, accommodating a Tesco store (which is to be replaced by a new Tesco Extra, situated off Southgate) and a Sainsbury's store, which trades under company average level, but which appears to be significantly compromised by its location and dated format. Accordingly, notwithstanding the fact that the proposed additional Tesco floorspace extinguishes any quantitative need for further convenience goods provision in the medium term (based on the maintenance of the current market share), we consider that Sleaford would benefit from the introduction of a further foodstore operator to the town (or an improved offer at Sainsbury's).'

2.28 Clearly, additional localised qualitative need for at least smaller scale convenience goods provision to cater for day-to-day (or 'top up') food shopping requirements will arise from the development of the SUEs in areas which currently have limited provision (due to the SUE sites' largely greenfield nature and location at the periphery of the existing built up area). As such, the lack of any real quantitative need across the town as a whole does not mean that there isn't a more localised need for appropriate retail provision.

Planning Permission Reference 125020

2.29 Outline planning permission reference 125020 was approved by West Lindsey District Council on 5 July 2011 and provides for the development of 2,500 new homes, together with associated employment uses, community services and facilities (comprising Use Classes A1, A2, A3, A4, A5, D1 and D2), formal and informal open space and associated infrastructure. The outline permission provides parameters to establish the principle of the Gainsborough Southern Neighbourhood SUE and to guide its future development.

2.30 The Planning Statement submitted with the application (Savills, October 2009) provides a summary of the proposal and the anticipated phases of development. Paragraphs 2.4 and 2.5 of the Planning Statement indicate that:

'The first phase would comprise in the region of 419 dwellings and it is likely that some local shopping facilities and a GP surgery would also be provided in this phase as the nucleus of a new local centre. The amount of retail floorspace involved would be in the region of 100 square metres (gross). In the second phase, a further 381 dwellings would be provided and the local centre would be completed with the provision of a single form entry primary school. The third phase would commence in 2014 and comprise a further 869 dwellings. Additional health care provision would be made in this phase when an energy centre providing on-site electricity generation as part of the energy and sustainability strategy for the development would also be provided. A final main phase of development would begin in 2019 and comprise around 520 dwellings. A second primary school together with further local shopping facilities would be provided at this stage. Again around 100 square metres (gross) of retail floorspace is envisaged.

The development also incorporates a 'neighbourhood centre' which would include larger-scale retail and service facilities and also be the focus for employment development (principally B1 business' and B2 'general industry'). Around 1,895 square metres (gross) of 'Class A' floorspace would be provided, including shops, cafes, pubs, etc, along with some 848 square metres (gross) of community facilities. About 13,400 square metres (gross) of employment floorspace would be provided altogether. Approximately 311 dwellings would also be provided as part of the neighbourhood centre.'

2.31 Accordingly, it is evident that substantial facilities are proposed to support the residential dwellings which are to be brought forward as a part of the development. In this regard, Condition 22 attached to the planning permission indicates that a minimum of 1,000 sq.m and a maximum of 2,100 sq.m gross retail floorspace shall be provided within the development with no more than 1,000 sq.m of gross A1 floorspace provided in any one unit. The permission therefore provides for local needs, but will also attract some main food shopping expenditure.

2.32 In summary, the planning permission provides for five principal elements, these being as follows:

- **Phase 1** is to provide 419 dwellings, together with local shopping facilities (totalling around 100 sq.m gross) and a GPs' surgery as the first part of a local centre (located close to the junction of Foxby Lane and Middlefield Lane);
- **Phase 2** is to provide 381 dwellings, together with a primary school which will form the second part of the proposed local centre;
- **Phase 3** is to provide 869 dwellings;
- **Phase 4** is to provide 520 dwellings; and
- A **Neighbourhood Centre** (located close to the existing Morrisons foodstore at the junction of Foxby Lane and Heapham Road) providing between 1,000 sq.m and 2,000 sq.m of gross retail floorspace, together with 311 dwellings.

3.0 Population and Expenditure Generated by Proposed SUEs

Population

3.01 In order to estimate the likely future population of each proposed SUE, it is first necessary to consider the average household size in each of the authority areas which will accommodate the proposed developments. Whilst household sizes are, in general, falling, we consider it appropriate to apply the average household size identified by the 2011 Census as any reduction in household size is likely to be focused around town and city centre locations (which are more likely to accommodate high density apartment developments and prove attractive to single persons) than SUEs. We derive the average household size for Gainsborough, Lincoln and Sleaford from the 2011 Mid-Year Lincolnshire Population and Household Estimates Reference Sheet published by the Lincolnshire County Council Research & Information Team in September 2012 (which, in turn, is derived from 2011 Census data).

3.02 Table 3.1 indicates very similar average household dwellings sizes at 2011 across the three authority areas under consideration, equating to 2.3 persons per household in Lincoln and West Lindsey, and 2.4 persons per household in North Kesteven.

Table 3.1: 2011 Mid-Year Population and Household Estimates

Area	Population Estimate at 2011	Households Estimate at 2011	Average Persons per Household
Lincolnshire County Council	714,800	306,971	2.3
Lincoln	93,100	39,825	2.3
North Kesteven	108,500	45,972	2.4
West Lindsey	89,400	38,385	2.3

Source: 2011 Mid-Year Lincolnshire Population and Household Estimates Reference Sheet (Lincolnshire County Council Research & Information Team, September 2012)

3.03 By applying the appropriate average household size to the number of proposed dwellings to be accommodated in each of the SUEs (as summarised at Table 2.1 of this report), we are able to estimate the likely population of each extension. This is provided below at Table 3.2.

Table 3.2: Proposed Number of Residential Dwellings in Each SUE Over the Plan Period and Beyond

SUE	Proposed Dwellings at 2031	Proposed Population at 2031	Total Proposed Dwellings	Total Proposed Population
Lincoln Western Growth Corridor	2,700	6,210	3,100	7,130
Lincoln South East Quadrant	2,800	6,720	6,000	14,400
Lincoln North East Quadrant	1,400	3,220	1,400	3,220
Gainsborough Southern Neighbourhood	2,500	5,750	2,500	5,750
Gainsborough Northern Neighbourhood	2,400	5,520	2,400	5,520
Gainsborough Eastern Neighbourhood	2,100	4,830	2,100	4,830
Sleaford West Quadrant	1,600	3,840	1,600	3,840
Sleaford South Quadrant	1,750	4,200	1,750	4,200
Total	**17,250**	**40,290**	**20,850**	**48,890**

3.04 It is therefore assumed that the SUEs will ultimately have populations of between 3,220 and 14,400 people, with the eight together having a total estimated population of 48,890.

Convenience Goods Expenditure

3.05 Per capita convenience goods expenditure at the most recent reporting year of 2011 has been sourced for each local authority area using Experian Micromarketer G3 data. Experian is a widely accepted source of expenditure and population data and is regularly used by WYG and by other consultants in assessments of this type. By multiplying the estimated convenience goods per capita expenditure by the number of persons who are expected to populate each SUE, an estimate of the overall convenience goods expenditure originating within the extension can be generated.

3.06 The base year for the Experian expenditure data is 2011 (and all subsequent monetary figures in this report are expressed in 2011 prices). Per capita growth forecasts have been derived from Appendix 3 of Experian Retail Planner Briefing Note 10.1, which was published in September 2012. For the purposes of this study, the following annual growth forecasts set out in Table 3.3 have been applied (it should be noted that Experian forecasts expenditure growth to 2029 only and, for the two years which follow to 2031, it has been assumed that the estimated growth rate identified at 2029 will continue).

Table 3.3: Experian Per Capita Expenditure Growth Forecasts

Year	Convenience
2012	+0.1%
2013	-0.1%
2014	+0.0%
2015	+0.4%
2016	+0.7%
2017	+0.7%
2018	+0.8%
2019	+0.8%
2020	+0.9%
2021	+1.0%
2022	+1.0%
2023	+1.0%
2024	+0.9%
2025	+0.9%
2026	+0.8%
2027	+0.8%
2028	+0.8%
2029	+0.8%
2030	+0.8%
2031	+0.8%

Source: Experian Retail Planner Briefing Note 10.1 (September 2012)

3.07 The above growth forecasts suggest that the current downturn in the economy will continue to impact upon future expenditure, at least in the short term, with particularly circumspect forecasts provided for 2012, 2013 and 2014. Modest growth of 0.4% at 2015 is then forecast to give way to relatively consistent continued growth in convenience goods expenditure growth between 2016 and 2029, with Experian forecasting that annual growth will fluctuate between 0.7% and 1.0% per annum over this period. It should be noted that growth in expenditure in the longer term (beyond the next ten years) must be treated with caution given the inherent uncertainties in predicting the economy's performance over time.

3.08 Experian Retail Planner Briefing Note 10.1 also provides a forecast as to the proportion of expenditure which will be committed through special forms of trading (comprising 'non-store retailing', such as internet sales, TV shopping and so on) in the period to 2029. In this regard, it should be noted that many products which are ordered online are actually sourced from a physical store's shelves or stockroom (this is particularly the case for convenience goods). Accordingly, the element of special forms of trading expenditure which is committed in this manner acts to support stores and should be considered 'available' to tangible retail destinations. Appendix 3 of Retail Planner Briefing Note 10.1 states that:

'Since the non-store retailing figures include supermarkets and other retailers that source internet goods sales from store space, the share of non-store retailing is over-stated from the point of view of those interested in physical retail outlets, particularly for convenience goods.'

3.09 Due to this 'over-statement', in making an allowance for expenditure committed via special forms for trading, we adopt Experian's adjusted figure (provided at Appendix 3 of the Briefing Note) which accounts for internet sales which are sourced from stores' shelves. Experian provides an adjusted special SFT figure of 4.7% at 2029 (the nearest date to our Core Strategy reporting year of 2031) and we have therefore 'stripped out' this proportion of convenience goods expenditure as it is not considered available in practice to support additional retail floorspace.

3.10 Using the above growth rates and special forms of trading allowances, Table 3.4 provides an estimate of the convenience goods expenditure which will be generated within each SUE at 2031. We have disaggregated the identified expenditure in terms of the assumed expenditure which will be committed through 'main food' shopping trips and that which will be committed through 'top up' food shopping in accordance with the findings of the household survey which informed the Central Lincolnshire City and Town Centres Study. The survey indicates that 73.5% of convenience goods expenditure throughout the Central Lincolnshire administrative area is committed through main food shopping trips, and 26.5% through 'top up' shopping trips.

Table 3.4: Estimated Available 'Top Up' Convenience Expenditure in Each SUE at 2031

SUE	Population at 2031	Per Capita Convenience Expenditure at 2011 (£)[1]	Per Capita Convenience Expenditure at 2011 without SFT (£)	Per Capita Convenience Expenditure at 2031 without SFT (£)[2]	Estimated Available Convenience Goods Expenditure at 2031 (£m)	Estimated Available 'Main Food' Convenience Expenditure at 2031 (£m)	Estimated Available 'Top Up' Convenience Expenditure at 2031 (£m)
Lincoln Western Growth Corridor	6,210	1,751	1,720	1,917	11.9	8.7	3.2
Lincoln South East Quadrant	6,720	1,751	1,720	1,917	12.9	9.5	3.4
Lincoln North East Quadrant	3,220	1,751	1,720	1,917	6.2	4.5	1.6
Gainsborough Southern Neighbourhood	5,750	1,756	1,724	1,922	11.1	8.1	2.9
Gainsborough Northern Neighbourhood	5,520	1,756	1,724	1,922	10.6	7.8	2.8
Gainsborough Eastern Neighbourhood	4,830	1,756	1,724	1,922	9.3	6.8	2.5
Sleaford West Quadrant	3,840	1,875	1,841	2,052	7.9	5.8	2.1
Sleaford South Quadrant	4,200	1,875	1,841	2,052	8.6	6.3	2.3
Total	**40,290**				**78.4**	**57.6**	**20.8**

[1] Per capita convenience expenditure sourced from Experian MMG3 data report for the built up area identified
[2] Expenditure growth and allowance for special forms of trading sourced from Appendix 3 of Experian Retail Planner Briefing Note 10.1 (September 2012)
In 2011 prices

3.11 It is also of relevance to consider the main food and 'top up' food expenditure which will be generated when all planned dwellings are built out in the period post 2031. Table 3.5 therefore provides a revised version of the above table to account for the additional dwellings which will be constructed after the Core Strategy plan period. We are unaware of any planned completion dates for the final dwellings which will form the Lincoln Western Growth Corridor and the Lincoln South East Quadrant SUEs and, given that it is almost impossible to accurately forecast the likely level of additional growth in convenience goods expenditure over the very long term, we have applied the identified per capita convenience expenditure at 2031 to the final assumed population of each SUE to calculate the approximate final convenience goods expenditure generated.

Table 3.5: Estimated Available 'Top Up' Convenience Expenditure in Each SUE at Completion

SUE	Total Population	Per Capita Convenience Expenditure at 2011 (£)[1]	Per Capita Convenience Expenditure at 2011 without SFT (£)	Per Capita Convenience Expenditure at 2031 without SFT (£)[2]	Estimated Available Convenience Goods Expenditure (£m)	Estimated Available 'Main Food' Convenience Expenditure (£m)	Estimated Available 'Top Up' Convenience Expenditure (£m)
Lincoln Western Growth Corridor	7,130	1,751	1,720	1,917	13.7	10.0	3.6
Lincoln South East Quadrant	14,400	1,751	1,720	1,917	27.6	20.3	7.3
Lincoln North East Quadrant	3,220	1,751	1,720	1,917	6.2	4.5	1.6
Gainsborough Southern Neighbourhood	5,750	1,756	1,724	1,922	11.1	8.1	2.9
Gainsborough Northern Neighbourhood	5,520	1,756	1,724	1,922	10.6	7.8	2.8
Gainsborough Eastern Neighbourhood	4,830	1,756	1,724	1,922	9.3	6.8	2.5
Sleaford West Quadrant	3,840	1,875	1,841	2,052	7.9	5.8	2.1
Sleaford South Quadrant	4,200	1,875	1,841	2,052	8.6	6.3	2.3
Total	**48,890**				**94.9**	**69.7**	**25.1**

[1] Per capita convenience expenditure sourced from Experian MMG3 data report for the built up area identified
[2] Expenditure growth and allowance for special forms of trading sourced from Appendix 3 of Experian Retail Planner Briefing Note 10.1 (September 2012)
In 2011 prices

3.12 The expenditure generated within each SUE is one component of the turnover which would support any store accommodated within the urban extension. Further assumptions need to be made in respect of any expenditure which will be attracted from adjacent areas and from passing custom (particularly if the provision is located in proximity to a main arterial route). We consider this matter in Section 5 of our report.

4.0 Existing Provision and the Population Needed to Support Further Facilities

The Ability of Existing Provision to Contribute to Meeting Needs

4.01 As set out at paragraphs 2.12 and 2.13 of this report, we consider the principal provision of relevance to achieving urban extensions which are genuinely 'sustainable' includes food shopping, designated retail centres, banks and building societies (or at least the availability of an ATM), post offices, libraries, GPs' surgeries and pharmacies. Accordingly, we have sourced GIS shapefile data from the Joint Planning Unit and have plotted the location of each of the above facilities on an Ordnance Survey base.

4.02 We have also considered the accessibility of the SUE sites to such existing provision with reference to the recommendations provided in Guidelines for Providing for Journeys on Foot (The Institution of Highways & Transportation, 2000), which is a widely accepted and referred to source in ascertaining the distances which individuals are likely to travel to access different types of facility. Table 3.2 of Guidelines for Providing for Journeys on Foot is replicated below and presented as our Table 4.1.

Table 4.1: Suggested Acceptable Walking Distances (Extracted from Guidelines for Providing for Journeys on Foot)

	Town Centres	Commuting/School Sight-seeing	Elsewhere
Desirable	200 metres	500 metres	400 metres
Acceptable	400 metres	1,000 metres	800 metres
Preferred Maximum	800 metres	2,000 metres	1,200 metres

Source: Guidelines for Providing for Journeys on Foot (The Institution of Highways & Transportation, 2000)

4.03 Carrying bags of shopping acts to significantly impair comfortable walking distance and it is therefore understandable that the Guidelines for Providing for Journeys on Foot suggests that longer walks may be undertaken to other facilities (denoted as 'elsewhere') than to town centres. As a consequence of the above and having regard to a sensible and viable distribution of facilities, we have assessed the distance within which we consider it to be advantageous for each of the identified key attractors to be located. We present these distance thresholds below in respect of food retail provision (Table 4.2) and other key attractors (Table 4.3).

4.04 Food retail provision has been disaggregated into three types: small convenience stores (which will fulfil only a 'top up' shopping role and will often be accessed on foot); smaller supermarkets (which will provide for a combination of 'top up' and main food shopping and will sometimes be accessed by foot); and large supermarkets and food superstores (which can meet all main food shopping needs and will generally be accessed by car). On this basis, it has been assumed that there will normally be a great preponderance of smaller stores serving localised areas as such stores require a lesser turnover to be viable and because individuals will be prepared to travel only relatively short distances to access such stores. Larger stores, which provide for main food shopping needs, are almost exclusively accessed by car and we have therefore assessed the catchment of such stores with reference to 'drive times' rather than walking distance.

Table 4.2: Assumed Sustainable Catchment of Foodstores

Provision	Assumed Sustainable Catchment Area
Small convenience store with a sales area of up to 500 sq.m	400 metres
Small supermarket with a sales area of between 500 sq.m and 1,500 sq.m	800 metres
Larger supermarket with a sales area of greater than 1,500 sq.m	5 minute drivetime

4.05 We have therefore assumed that an individual will be prepared to walk up to 400 metres to access a small convenience store and up to 800 metres to access a small supermarket. The need to carry multiple heavy bags of shopping ensures that main food shopping destinations are most often visited by car and, on this basis and from our knowledge of the attraction of such operations, we have assumed that it is advantageous (in order to reduce journey lengths and promote sustainable development) for the primary catchment of a large supermarket or superstore to equate to a five minute drivetime. Whilst it is accepted that numerous shoppers may travel greater distances to access their preferred supermarket, we consider it to be beneficial to assume that a more local main food shopping option should be provided.

4.06 Table 4.3 provides our assumptions in respect of how far individuals may be prepared to travel on foot to access other key attractors. We have utilised the 'preferred maximum' of 800 metres identified by the Guidelines for Providing for Journeys on Foot in respect of the distance to a designated centre, as we do not consider the provision of centres with appreciably smaller catchments to be viable in all but the most densely populated cities.

4.07 For three out of the four remaining key attractors ('banks, building societies and ATMs', 'post offices' and 'GPs' surgeries') we have adopted the 'acceptable' walking distance of 800 metres to other facilities identified by the Guidelines. For the fourth – libraries – we have used the higher figure of 1,200 metres, as we consider that there will typically be fewer libraries than banks, pharmacies and post offices in a town, and with good reason, as a larger catchment should allow for a better library service with a greater choice of books.

Table 4.3: Assumed Sustainable Catchment of Other Key Attractors

Provision	Reasonable Catchment
Designated retail centres	800 metres
Banks, building societies or ATM	800 metres
Post offices	800 metres
Libraries	1,200 metres
GPs' surgeries	800 metres
Pharmacies	800 metres

4.08 We have used the above walking and driving catchments to plot the areas which are served or have the potential to be served by the identified existing provision. The catchment plans are provided on a settlement basis for each of the above key attractors and are provided at Appendices 1 ('Lincoln'), 2 ('Gainsborough') and 3 ('Sleaford'). It should be noted that the catchment plans are, by necessity, a cautious representation of future accessibility as they are only able to utilise existing highways and pathways, and the completed SUEs will clearly provide additional roads and footpaths to integrate the developments with the existing transport network. We have assessed how existing provision has the potential to serve each of the planned SUEs and have summarised this analysis in tabulated form below at Table 4.4. In the below table, each attractor gets a positive 'tick' response if its catchment area (as specified by Table 4.3) incorporates any part of the planned SUE.

4.09 Clearly, the fact that part of a SUE is identified using the above criteria as being accessible to one of the key indicators does not mean that the whole SUE is afforded appropriate access to the facility. Conversely, the criteria used represents desirable distances and the absence of a particular facility in very close proximity to the planned SUE does not necessarily indicate that it is viable to provide additional provision within the SUE itself.

Table 4.4: Proximity of Existing Key Attractors to Any Part of a Planned SUE

Sustainable Urban Extension	Foodstore with Sales Area of up to 1,500 sq.m	Foodstore with Sales Area Greater than 1,500 sq.m	Retail Centre	Bank or ATM	Post Office	Library	GPs' Surgery	Pharmacy
Lincoln Western Growth Corridor	✓	✓	×	✓	✓	✓	×	×
Lincoln South East Quadrant	✓	✓	✓	×	✓	✓	✓	✓
Lincoln North East Quadrant	✓	✓	✓	✓	✓	×	×	✓
Gainsborough Southern Neighbourhood	✓	✓	×	×	×	×	×	✓
Gainsborough Northern Neighbourhood	×	✓	×	×	×	×	×	×
Gainsborough Eastern Neighbourhood	×	✓	×	×	×	×	×	✓
Sleaford West Quadrant	✓	✓	×	✓	✓	×	×	×
Sleaford South Quadrant	×	✓	✓	×	×	×	×	×

4.10 Using Sleaford as an example, it is evident that key facilities are principally provided within the town centre itself. Whilst the centre lies just beyond the desirable catchment distances to various key attractors utilised in this study, the provision of, for example, an additional library to cater for either of the SUEs may not be viable or desirable given that this could have the potential to dilute the important role which the existing library has in helping attract people to the centre.

Facilities and the Number of Households Served

4.11 In order to better understand the critical mass of households or population which may be required to support additional retail and service provision, it is helpful to consider typical benchmarks of the numbers required to support viable local facilities. In this regard, we consider that the Integration of Parish Plans into the Wider Systems of Local Government report (DEFRA, July 2007) provides a realistic assessment of the number of homes which are required to support various types of facilities. The Integration of Parish Plans report is accepted as a credible source of such benchmark data by the Towards Sustainable Communities: Eco-towns Community Worksheet (Town and Country Planning Association and Department for Communities and Local Government, March 2008) which seeks to provide instruction to proponents and planners in bringing forward new developments.

4.12 For the purpose of this study, the most relevant groups of facilities considered by Table 2.1 of the Integration of Parish Plans report are GPs' surgeries, groups of shops, post offices and libraries. A version of the report's Table 2.1 is provided below as our Table 4.5.

Table 4.5: Facilities and the Number of Households the Serve (as Amended from Integration of Parish Plans into the Wider Systems of Local Government report)

Facility	Number of Households Required to Support Specified Facility	WYG's Estimate of Population to Support Specified Facility Based on Assumed Dwelling Occupation[1]
GPs' Surgery	1,000 to 1,200	2,300 to 2,760
Group of Shops	2,000 to 4,000	4,600 to 9,200
Post Office	2,000 to 4,000	4,600 to 9,200
Library	4,800 to 12,000	11,040 to 27,600

[1] Based on an average occupancy of 2.3 persons per dwelling

4.13 Based on the above, we set out below at Table 4.6 our assessment of whether the population of the completed SUEs could (assuming, for these purposes at least, that the extensions will have no strong relationship with such existing facilities in the wider area) support such additional provision. Once again, we use a simple 'tick' to denote a positive response.

Table 4.6: Ability of SUEs to Support Additional Provision

Sustainable Urban Extension	Estimated Population	GPs Surgery	Group of Shops	Post Office	Library
Lincoln Western Growth Corridor	7,130	✓	✓	✓	×
Lincoln South East Quadrant	14,400	✓	✓	✓	✓
Lincoln North East Quadrant	3,220	✓	×	×	×
Gainsborough Southern Neighbourhood	5,750	✓	✓	✓	×
Gainsborough Northern Neighbourhood	5,520	✓	✓	✓	×
Gainsborough Eastern Neighbourhood	4,830	✓	✓	✓	×
Sleaford West Quadrant	3,840	✓	×	×	×
Sleaford South Quadrant	4,200	✓	×	×	×

4.14 Clearly, the above table refers only to the population of the planned SUEs and does not consider whether there is any latent demand in the existing immediate area for additional local needs provision. On this basis, the cited benchmarks should be viewed with some caution. However, they do suggest that each of the SUEs could support at least one GPs' surgery, that all but Lincoln North east Quadrant, Sleaford West and Sleaford East could support a parade of shops and a post office, and that only Lincoln South East would appear able to support a new library.

4.15 We use the above analysis, together with observations gleaned 'on the ground' during site surveys undertaken in April 2013, to assist in our consideration of the need for additional provision which we set out in the following Section 5.

5.0 Need for Additional Facilities

Requirement for Additional Non-Retail Facilities

5.01 Having regard to the distribution of existing facilities, the need for a certain level of population to support particular facilities, and our observations on site, we provide commentary on the likely need for non-retail facilities to be provided as part of the SUE developments below. We reiterate that our comments are principally formed from a planning and sustainability standpoint and that detailed discussions will need to take place with any service providers – notably the relevant clinical commissioning group, the post office and banks and building societies – to determine the viability of additional provision and the scale of service which could be supported.

5.02 The Lincoln SUEs are the largest of the proposed extensions and are the greatest distance from a defined town centre (or, more accurately in this case, city centre) and therefore may have greater potential to accommodate a wider range of facilities. Conversely, the planned Sleaford SUEs are located a relatively short distance from the town centre and we therefore envisage that the future population of the SUEs will appropriately access many services within the centre.

Lincoln Western Growth Corridor

5.03 The south eastern boundary of the proposed Lincoln West Growth is demarcated by the Lincoln to Nottingham railway line which will have some influence on the ability of residents of the SUE to access facilities which are located to the east. Given this and the scale of the proposed SUE (which we estimate could have a population in the order of 7,130 persons), we consider that there is substantial opportunity to provide additional retail and service facilities to cater for the development. Furthermore, we reiterate that last year's City and Town Centres Study identified significant need for additional convenience floorspace across the City in the period to 2031 (equating to two or three additional food superstores).

5.04 Whilst we note that the Birchwood Centre (designated as a 'neighbourhood centre') is located around a kilometre to the south west of the boundary of the planned SUE, this centre appears to be relatively healthy from the patronage of existing residents and we consider that it would play only a limited role in meeting requirements which arise from the SUE. It will, however, be necessary to ensure that this existing retail destination is not the subject of any unacceptable impact which could arise from additional retail development within the SUE.

5.05 Given the scale of housing planned within the Lincoln Western Growth Corridor SUE, we consider that there is potential for two groupings of retail and services to be provided. Subject to the consideration of the retail impacts which would arise from the implementation of such an operation, one of these could accommodate a main food supermarket, which we would envisage would have minimum sales area of 1,500 sq.m. Indeed, subject to confirmation that the impacts of such development would be acceptable, we consider that there may be scope to accommodate a food superstore (this being defined as a store with a sales area of 2,500 sq.m or more) within the development. In this regard, we note that the nearest main superstores are the Morrisons and Sainsbury's stores at Tritton Road which have net sales areas of 3,064 sq.m and 3,756 sq.m respectively. Accordingly, in order for a future main food shopping destination to compete 'head to head' with this existing provision and dissuade shoppers from travelling further afield, a sales area of a broadly comparable scale may be required. Clearly, there is also scope for additional retail and service units, a post office and banking facilities or ATMs to be provided as part of any future development.

5.06 Whilst our benchmarking exercise suggests that the future population of the SUE is slightly below the level which would ordinarily support a further library, in examining the current distribution of library facilities throughout Lincoln it is evident that the SUE would be less well served by existing libraries than most parts of the City. Accordingly, consideration may need to be given by Lincolnshire County Council as to the ability of the SUE to access library services. We also consider that the proposed SUE is of such a scale to likely merit an additional GPs' surgery or surgeries.

Lincoln South East Quadrant

5.07 It is planned that the Lincolnshire South East Quadrant will be the largest of the SUEs, with a total population on completion of approximately 14,400.

5.08 Once more, due to the scale of development proposed and the previously identified need for additional main food shopping facilities in the Lincoln area going forward, we consider there to be an opportunity to provide substantial food shopping and service facilities within the development. In this regard, we also note that the geographic distribution of main food shopping facilities across the City is not particularly helpful in serving the South East Quadrant, with the Tesco superstore at Canwick Road being the closest such facility. Accordingly, we consider that there is the potential to provide a main food shopping destination within the development as part of one of two potential groupings of shops and services.

5.09 Once more, the appropriateness of any such provision ultimately needs to be determined with reference to a detailed consideration of the impacts which could arise from such a development, including the trade which may be diverted from existing designated retail centres, including Bracebridge Heath. Subject to the findings of such an assessment, we would envisage that any additional main food shopping destination would have a minimum sales area of 1,500 sq.m. Indeed, subject to confirmation that the impacts of such development would be acceptable, we consider that there may be scope for a substantially larger food superstore within the development. In the case of the South East Quadrant, the nearest food superstore is the Tesco store at Canwick Road which has a net sales area of 2,465 sq.m. Once more, in order to complete on a 'head to head' basis with existing provision, we would anticipate that any future operator of a large foodstore at the South East Quadrant would require a store of a broadly similar scale. There is also scope for additional retail and service units, a post office and banking facilities or ATMs to be provided as part of any future development.

5.10 In this instance, our benchmarking exercise suggests that a settlement of the size proposed may be able to support a library and, notwithstanding the current climate (in which more libraries are closing than opening), we would suggest that discussions are undertaken with Lincolnshire County Council in order to ascertain the most appropriate means through which to secure appropriate access to library facilities for the residents of the SUE. In this regard, we do note that the existing library at Bracebridge Heath has clear potential to serve at least part of the extension.

5.11 Once more, given the planned scale of the SUE, we also consider it likely that an additional GPs' surgery or surgeries will be required to meet the needs of residents.

Lincoln North East Quadrant

5.12 The Lincoln North East Quadrant is by far the smallest of the planned Lincoln SUEs, which we estimate will have a population in the order of 3,220 on completion. The North East Quadrant is also in relatively close proximity to a number of important facilities, most notably the recent Carlton Centre development, but also the Tesco store at Wragby Road and the Waitrose store at Searby Road. The Carlton Centre development provides attractive facilities within walking distance of much of the proposed SUE and the additional planned residential development will help safeguard the Carlton Centre's future vitality and viability.

5.13 Accordingly, we consider that any additional retailing as part of the development will be small scale only to meet day to day needs only. We envisage that such provision would include a small convenience store and a very small number of other units. We also note from consideration of the distribution of existing facilities, that there may well be potential to provide a further GPs' surgery in the eastern part of Lincoln and that the area is relatively poorly served in terms of access to libraries. Accordingly, we consider that discussions should be undertaken with both Lincolnshire West CCG and Lincolnshire County Council with regard to the most appropriate means of meeting such needs.

Gainsborough Southern Neighbourhood

5.14 The format of future retail and service provision within the Gainsborough Southern Neighbourhood SUE is provided for by outline planning permission reference 125020. The permission remains extant at the time of reporting and, as summarised in Section 2 of this report, allows for the development of 2,500 new homes, together with associated employment uses, community services and facilities (comprising Use Classes A1, A2, A3, A4, A5, D1 and D2), formal and informal open space, and associated infrastructure.

5.15 Not only is the Southern Neighbourhood the largest of the three extensions proposed in Gainsborough, it is also in closest proximity to areas of existing population, with the Park Springs residential suburb being to the north of Foxby Lane. Moreover, the 'neighbourhood centre' provided for by the extant planning permission would be anchored to some extent by the Morrisons supermarket located a short distance across Foxby Lane and would have the potential to attract linked trips undertaken to the superstore. Accordingly, we would concur with the scheme's proponent that the planned Southern Neighbourhood has substantial potential to accommodate additional retail and service provision and that the proposed format for this – incorporating both a 'neighbourhood' and a 'local' centre – may be an appropriate solution to provide straightforward pedestrian access to both future residents of the SUE and those which currently reside to the north of Foxby Lane.

5.16 Our analysis of the likely population of the Southern Neighbourhood confirms that additional shops, a post office and banking/ATM facilities could be supported, and that there is potential to accommodate a GPs' surgery (subject to specific confirmation of local requirements by the Lincolnshire West CCG).

Gainsborough Northern Neighbourhood

5.17 The planned Gainsborough Northern Neighbourhood SUE is located slightly apart from existing residential neighbourhoods, but has the potential to benefit from reasonable accessibility to the existing Tesco and Morrisons food superstores either by bus or by private motor car. Accordingly, given the lack of any significant quantitative need in Gainsborough for additional convenience goods provision, we consider that additional facilities to serve the SUE will be focused around small-scale local needs retailing only. We also note the recent development of the Corringham Road local shopping facility to the south west of the site which has the ability to serve both the southern part of the SUE and those future residents who will travel along Corringham Road as part of their daily routine.

5.18 We consider the future population of the SUE to be sufficiently great to have the potential to support a GPs' surgery, subject to confirmation of the viability of such a use from the Lincolnshire West CCG. Given the recent development at Corringham Road, we envisage that further retail and service provision brought forward as part of the SUE will be 'embedded' in the development and located in a central part of the site.

Gainsborough Eastern Neighbourhood

5.19 Gainsborough Eastern Neighbourhood is similarly somewhat detached from the existing residential areas of Gainsborough, but also has the potential to provide acceptable access to existing main food shopping facilities either by bus or by car. Once more, given the lack of any substantial quantitative need for additional main food shopping provision in Gainsborough, we recommend that facilities provided as part of the SUE development are limited in scale and respond to local needs only. We consider that such provision would include small-scale retail units and, potentially, a post office with ATM.

5.20 From the benchmarking exercise undertaken in Section 4 of this report, we are also of the view that the future population of the SUE has the potential to support a GPs' surgery, subject to confirmation of local needs by the Lincolnshire West CCG.

5.21 Given the relative lack of an immediate surrounding population, we would recommend that future provision is located in the centre of the planned SUE, to afford appropriate access to facilities for all SUE residents.

Sleaford South Quadrant

5.22 Whilst the Sleaford South Quadrant is relatively well located in terms of its relationship with Sleaford town centre and the site of the planned Tesco Express superstore (at the former Advanta Seeds Site, off Southgate), the existing built up area to the north and east is almost wholly residential in character and is lacking in substantial service provision. We are unaware of any existing foodstore of any note in the Quarrington and New Quarrington areas and, whilst the proposed Tesco together with the existing Sainsbury's store in the town centre will be able to appropriately cater for main food shopping needs, without additional appropriate commercial development the planned South Sleaford Quadrant SUE will be poorly served in terms of its accessibility to some day to day services.

5.23 Whilst we would not anticipate a SUE of the size planned at South Sleaford being able to support, for example, a new library, we do consider that there may be scope to provide facilities such as a small foodstore, post office and a limited number of additional small scale units to accommodate local shops and services. We also note that, whilst most of the southern part of Sleaford benefits from good access to the Sleaford Medical Group doctors' surgery at Boston Road, the planned SUE may well be of sufficient size to support a further GPs' surgery, particularly when taken together with the adjacent existing residential area of Quarrington. The viability of additional healthcare facilities will need to be discussed with the South West Lincolnshire CCG.

5.24 Even if a further GPs' surgery was to be provided, we anticipate that a pharmacy counter will likely be accommodated within the nearby proposed Tesco Extra off Southgate and we are therefore unsure as to whether there would be any commercial interest in providing further such provision as part of the Sleaford South Quadrant development. We envisage that retail and service provision to serve the SUE will be located towards the west of the site, off London Road, in order to serve newly constructed dwellings, existing residents of Quarrington and passing traffic.

Sleaford West Quadrant

5.25 The planned Sleaford West Quadrant is in relatively close proximity to the existing Lincoln Road parade of shops – which accommodates a small Co-op foodstore, hairdresser, cafe and take-away – and is in close enough proximity to Sleaford town centre to benefit from its food retail and comparison offer. Although Sleaford West Quadrant will be subject to less beneficial access to main food shopping provision following Tesco's proposed move to the Advanta Seeds site, it is still considered that both the new Tesco Extra store and the Sainsbury's in Sleaford town centre will be reasonably accessible to the planned SUE.

5.26 Accordingly, we would again anticipate that Sleaford West Quadrant has the ability to support local food retail provision only, together with a very limited number of small-scale units to provide local services and which could possibly include a post office. Once again, we consider that the Sleaford West Quadrant has the potential to support an additional GPs' surgery, subject to confirmation of requirements from the South West Lincolnshire CCG. Given the ability of existing facilities at Lincoln Road to serve the eastern part of the SUE, we envisage that additional provision will be 'embedded' within the development, somewhere to the north of Drove Lane.

Quantitative Need for Additional Convenience Retail Floorspace

5.27 In order to provide more qualified and precise recommendations relating to convenience goods floorspace requirements, it is necessary to consider the quantitative need for additional convenience retail which will result from the proposed development. In the main, we consider it appropriate for main food shopping needs which arise from the SUEs to be directed towards existing centres and existing food superstores. The exception to this is in Lincoln, where last year's City and Town Centres Study identified a need for two or three additional superstores in the period to 2031.

5.28 Accordingly, the detailed consideration of quantitative convenience need provided by this report is limited to 'top up' food shopping only. Such purchases (which include snacks, frequent purchases such as bread and milk, and items which may have been forgotten in undertaking a main food shop) are often undertaken close to home to avoid unnecessarily long journeys.

5.29 Appendix 4 sets out our detailed tables which provide our step-by-step approach to the estimation of available convenience goods 'top up' expenditure. In summary, we have followed a four stage approach which is consistent with the instruction provided in regard to the quantification of need provided by the Practice Guidance on Need, Impact and the Sequential Approach, which was originally published to accompany PPS4 in December 2009 but which remains extant.

5.30 Our four stage approach comprises:

- **Stage 1** involves the identification of the population of each of the planned SUEs, both at 2031 and on completion of the development (in this regard, both Lincoln Western Growth Corridor and Lincoln South East Corridor are expected to be completed in the period post-2031).

- **Stage 2** requires the consideration of the convenience goods expenditure which will originate from each SUE.

- **Stage 3** requires a professional judgement as to the proportion of available expenditure which could reasonably be expected to be directed to local facilities within the SUE (it is assumed inevitable that some convenience goods 'top up' spending occurs during an individuals' general day to day activities, for example, when on a lunchbreak or when filling up the car with petrol). We have also made a judgement as to how much 'top up' expenditure could be directed towards a convenience goods store situated within the SUE from individuals who reside outside the SUE.

- **Stage 4** provides our assessment of the future capacity which is available to support additional convenience goods retail facilities, which is expressed both as a monetary figure and as a minimum and maximum floorspace requirement.

5.31 Stage 1 and Stage 2 were undertaken in Section 3 of this report. We provide a summary of our estimation of available 'top up' convenience goods expenditure which originates from each planned SUE at 2031 at Table 5.1 below, together with Table 5.2 which provides our estimate of the increase in expenditure arising from the additional population which will be accommodated within the Lincoln Western Growth Corridor and Lincoln South East Quadrant SUEs beyond this period.

Table 5.1: Estimated Available Expenditure within Each SUE at 2031

SUE	Planned Population 2031	Per Capita Convenience Expenditure at 2031 without SFT (£)[1]	Estimated Available Convenience Goods Expenditure at 2031 without SFT (£m)	Estimated Available 'Main Food' Convenience Goods Expenditure at 2031 (£m)	Estimated Available 'Top Up' Convenience Goods Expenditure at 2031 (£m)
Lincoln Western Growth Corridor	6,210	1,917	11.9	8.7	3.2
Lincoln South East Quadrant	6,720	1,917	12.9	9.5	3.4
Lincoln North East Quadrant	3,220	1,917	6.2	4.5	1.6
Gainsborough Southern Neighbourhood	5,750	1,922	11.1	8.1	2.9
Gainsborough Northern Neighbourhood	5,520	1,922	10.6	7.8	2.8
Gainsborough Eastern Neighbourhood	4,830	1,922	9.3	6.8	2.5
Sleaford West Quadrant	3,840	2,052	7.9	5.8	2.1
Sleaford South Quadrant	4,200	2,052	8.6	6.3	2.3

[1] Per capita convenience expenditure sourced from Experian MMG3 data report for the built up area identified and expenditure growth and allowance for special forms of trading sourced from Appendix 3 of Experian Retail Planner Briefing
In 2011 prices

Table 5.2: Estimated Available Expenditure within Lincoln Western Growth Corridor and Lincoln SUE on Completion

SUE	Planned Final Population	Per Capita Convenience Expenditure on Completion without SFT[1]	Estimated Available Convenience Goods Expenditure on Completion without SFT (£m)	Estimated Available 'Main Food' Convenience Goods Expenditure on Completion (£m)	Estimated Available 'Top Up' Convenience Goods Expenditure on Completion (£m)
Lincoln Western Growth Corridor	7,130	1,917	13.7	10.0	3.6
Lincoln South East Quadrant	14,400	1,917	27.6	20.3	7.3

[1] Per capita convenience expenditure sourced from Experian MMG3 data report for the built up area identified and expenditure growth and allowance for special forms of trading sourced from Appendix 3 of Experian Retail Planner Briefing
In 2011 prices

5.32 As a consequence of additional residential dwelling completions planned to occur at Lincoln Western Growth Corridor and Lincoln South East Quadrant after 2031, we estimate that the planned final population of the SUEs will be approximately 48,980 which will equate to a estimated combined 'top up' convenience expenditure of £25.1m.

5.33 We summarise our approach to Stages 3 and 4 below.

Stage 3

5.34 From our knowledge of how households shop and their natural inclination to use facilities close to home to undertaken much of their 'top up' shopping, we consider that appropriately located convenience facilities accessible to all of the planned SUE will generally have the potential to attract around half of all such expenditure originating from within the SUE.

5.35 We consider there to be two cases where slightly less than half of all 'top up' convenience expenditure would likely be retained within the SUE, this being at Lincoln North East Quadrant and at Gainsborough Northern Neighbourhood. We note that Lincoln North East Quadrant benefits from particularly good access to nearby retail facilities at Carlton Centre and also to foodstores at Wragby Road and Searby Road. Similarly, the Gainsborough Northern Neighbourhood is located in close proximity to the recently open Tillbridge Centre at Corringham Road. As a consequence, we believe it inevitable that some convenience 'top up' expenditure will be spent at such facilities and we therefore consider it sensible to assume that 40% of the 'top up' convenience expenditure which originates within these two SUEs will be available to facilities located within the SUE.

5.36 In order for additional shopping facilities to appropriately meet the needs of all of the future population, we consider that the majority of facilities will be provided in relatively central locations within the boundary of the SUE. One exception to this is at Sleaford West Quadrant where we consider it appropriate for additional facilities to be located in close proximity to London Road in order to serve the SUE, residents of the adjacent residential neighbourhood of Quarrington, and passing motorists.

5.37 As a consequence of this, we consider that the majority of the turnover of 'top up' convenience stores which are 'embedded' within the SUEs would originate within the SUE. However, individuals will clearly visit the SUEs for various reasons (to work and to visit friends and relatives, to name but two) and we consider that, typically, around 30% of a small convenience store's total turnover may derive from outside the SUE. For the reason specified above, we consider that facilities provided at Sleaford West Quadrant have the potential to draw trade from the Quarrington area and from passing motorists. As a consequence, we estimate that 50% of the turnover of a convenience store at Sleaford West Quadrant would originate from outside of the SUE itself.

5.38 Based on the above assumptions, we set out our estimation of the available 'top up' convenience expenditure at 2031 below at Table 5.3. We then set our estimation of the total 'top up' expenditure which may arise at Lincoln Western Growth Corridor and Lincoln South East Quadrant in the period post 2031. The tables indicate that between £1.3m and £5.0m will be available to each SUE to support day to day convenience goods shopping facilities.

Table 5.3: Estimated Available Expenditure within Each SUE at 2031

SUE	Estimated Available 'Top Up' Convenience Goods Expenditure at 2031 (£m)	Proportion Likely to be Available to Local Shops within SUE	Top Up Expenditure Orignating in SUE Spent in SUE (£m)	Inflow from Other Areas as Proportion of Facilities' Overall Turnover	Total Top-Up Expenditure Claimed by Facilities within SUE (£m)
Lincoln Western Growth Corridor	3.2	50%	1.6	30%	2.3
Lincoln South East Quadrant	3.4	50%	1.7	30%	2.4
Lincoln North East Quadrant	1.6	40%	0.7	30%	0.9
Gainsborough Southern Neighbourhood	2.9	50%	1.5	30%	2.1
Gainsborough Northern Neighbourhood	2.8	40%	1.1	30%	1.6
Gainsborough Eastern Neighbourhood	2.5	50%	1.2	30%	1.8
Sleaford West Quadrant	2.1	50%	1.0	30%	1.5
Sleaford South Quadrant	2.3	50%	1.1	50%	2.3

In 2011 prices

Table 5.4: Estimated Available Expenditure within Lincoln Western Growth Corridor and Lincoln SUE on Completion

SUE	Estimated Available 'Top Up' Convenience Goods Expenditure on Completion £m)	Proportion Likely to be Available to Local Shops within SUE	Top Up Expenditure Orignating in SUE Spent in SUE (£m)	Inflow from Other Areas as Proportion of Facilities' Overall Turnover	Total Top-Up Expenditure Claimed by Facilities within SUE (£m)
Lincoln Western Growth Corridor	3.6	50%	1.8	30%	2.6
Lincoln South East Quadrant	7.3	50%	3.7	30%	5.2

In 2011 prices

Stage 4

5.39 Given the above estimations of available expenditure, the final step in our methodology is to convert identified expenditure into a floorspace requirement. In undertaking this stage of the exercise, we have assumed that additional floorspace is likely to be occupied by either a convenience store specialist (such as Budgens, the Co-op, Londis or Spar) or by one of the 'main four' foodstore operators (Asda, Morrisons, Sainsbury's and Tesco) utilising their smallest store format. The former group of operators typically have a lower sales density (this being the monetary value of goods traded from each square metre of floorspace) than the latter. As a result, we have deployed the average sales density of both the above four specified small convenience store operators and the average sales density of the 'main four' operators to provide two different floorspace requirements. The two different figures act as a 'minimum' and 'maximum' requirement to reflect the fact that any future consented floorspace could be occupied by different types of retailer.

5.40 The convenience store operator sales densities have been sourced from Mintel Retail Rankings 2011 and the 'main four' sales densities from the Verdict UK Food & Grocery Retailers 2012 report. Each is expressed in 2011 prices. Allowances have been made for future improvements in sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 10.1 (equating to 0.1% at 2012, -0.7% at 2013, 0.1% per annum between 2014 and 2019, and 0.2% per annum from 2020).

5.41 Using this approach, we estimate that the four convenience stores operators will have an average sales density of £7,743 per sq.m and the 'main four' operators an average sales density of £12,152 per sq.m at 2031. Tables 5.6 and 5.7 provide our estimation of 'top up' convenience goods floorspace requirements when these sales densities are applied to the available expenditure identified in Tables 5.4 and 5.5. Given the timescale involved and the broad assumptions made in considering day to day convenience retail needs, we have rounded the identified floorspace requirements to the nearest 10 square metres. The tables indicate that our identified 'top up' food shopping requirements for the SUEs range from a minimum requirement for 110 sq.m of sales floorspace at Lincoln North East Quadrant to a minimum requirement for 410 sq.m of sales floorspace at Lincoln South East Quadrant.

Table 5.5: Estimated Available Expenditure within Each SUE at 2031

SUE	Total Top-Up Expenditure Claimed by Facilities within SUE (£m)	Average Sales Density of 'Main Four' Convenience Store[1]	Average Sales Density of Typical Convenience Store[2]	Minimum Required 'Top Up' Floorspace Deriving from Each SUE	Maximum Required 'Top Up' Floorspace Deriving from Each SUE
Lincoln Western Growth Corridor	2.3	12,152	7,743	190	290
Lincoln South East Quadrant	2.4	12,152	7,743	200	310
Lincoln North East Quadrant	0.9	12,152	7,743	80	120
Gainsborough Southern Neighbourhood	2.1	12,152	7,743	170	270
Gainsborough Northern Neighbourhood	1.6	12,152	7,743	130	210
Gainsborough Eastern Neighbourhood	1.8	12,152	7,743	140	230
Sleaford West Quadrant	1.5	12,152	7,743	120	190
Sleaford South Quadrant	2.3	12,152	7,743	190	300

[1] Main four convenience store turnover derived from combined average sales densities of Asda, Morrisons, Tesco and Sainsbury's reported by Verdict UK Food & Grocery Retailers 2012.
[2] Typical convenience store turnover derived from combined average sales densities of Budgens, Co-op, Londis and Spar as reported by Mintel Retail Rankings 2011
In 2011 prices

Table 5.6: Estimated Available Expenditure within Lincoln Western Growth Corridor and Lincoln SUE on Completion

SUE	Total Top-Up Expenditure Claimed by Facilities within SUE (£m)	Average Sales Density of 'Main Four' Convenience Store[1]	Average Sales Density of Typical Convenience Store[2]	Minimum Required 'Top Up' Floorspace Deriving from Each SUE	Maximum Required 'Top Up' Floorspace Deriving from Each SUE
Lincoln Western Growth Corridor	2.6	12,152	7,743	210	330
Lincoln South East Quadrant	5.2	12,152	7,743	430	670

[1] Main four convenience store turnover derived from combined average sales densities of Asda, Morrisons, Tesco and Sainsbury's reported by Verdict UK Food & Grocery Retailers 2012.
[2] Typical convenience store turnover derived from combined average sales densities of Budgens, Co-op, Londis and Spar as reported by Mintel Retail Rankings 2011
In 2011 prices

5.42 We use these identified requirements to provide our overall recommendations in respect of the broad appropriate scale of retail and service development to be incorporated within the SUEs in the following Section 6 of the report.

6.0 Recommendations

6.01 In providing our recommendations, we draw together our observations in respect of the ability of existing services to support the future SUEs which we set out in Section 4, together with our findings in respect of need provided at Section 5. For seven of the eight SUEs, we are aware that proponents of each scheme continue to consider the form of development which will come forward and that no detailed proposals for any are currently in the public domain. Whilst our recommendations are intended to help shape the detail of such proposals, it is important to recognise that identified needs can be met in a number of ways and, accordingly, we seek to provide an appropriate degree of flexibility in reporting our findings. Accordingly, whilst we recognise that there may be potential for additional commercial units to form part of any grouping of facilities, we do not seek to be prescriptive in terms of the exact range of uses which could be accommodated within such units. We envisage that such units may typically be around 100 sq.m or thereabouts in size and could accommodate the full range of uses – including shops, restaurants, take aways and services – appropriately found in smaller centres.

6.02 It should be noted that the definition of a centre will be made with reference to the scale, role and function of uses provided and that it is likely that a small scale convenience store, accompanied by only a handful of other units will more closely resemble a 'local parade'. A parade of shops with a very local influence will not generally benefit from any formal planning policy designation.

6.03 It is also important to note that our recommendations are focused primarily around providing facilities of an appropriate scale in a sustainable location. Whilst we do not envisage that there is likely to be any issue in terms of the potential for any significant adverse impact to arise at any existing designated centre as a result of small-scale local needs development, such development should nevertheless be subjected to all relevant policy tests at the time of the submission of a future planning application.

6.04 Given the findings of the Central Lincolnshire City and Town Centres Study which reported last year, we consider there to be potential to provide more than one additional large foodstore in Lincoln and that the Lincoln Growth Corridor and the Lincoln South East Quadrant each have the potential to accommodate such a store. Any future planning application to provide such a large format foodstore must also satisfy all relevant policy tests, including the test of impact.

6.05 On this basis, our recommendations for each of the SUEs follow. Any recommendation in respect of the type of centre or centres which could be supported is based on the information currently available which does not provide for a detailed understanding of dwelling types and the exact location of residential accommodation. Moreover, it should also be noted that there will be a number of different ways of meeting identified needs and that the sites' proponents and the local authorities may have their own clear view as to how services can be provided for residents in a sustainable manner. We again reiterate that our consideration of the provision of non-retail services has been undertaken from a planning and sustainability standpoint, and that detailed discussions with service operators will provide additional clarity in respect of the scale of provision which may be supported.

6.06 In this context, we provide our view below as to the potential for each SUE to accommodate a defined retail centre or centres.

Lincoln Western Growth Corridor

6.07 At Lincoln Western Growth Corridor we consider there to be a requirement for between 190 sq.m and 290 sq.m of small format net convenience floorspace at 2031, rising to a need for between 210 sq.m and 330 sq.m on completion of the SUE. As reported in Section 5, we also consider that there may be the potential to accommodate a main food shopping store within the SUE which would cater for both the SUE and the wider catchment. We note that the nearby Morrisons and Sainsbury's superstores at Tritton Road have net sales areas of 3,064 sq.m and 3,756 sq.m respectively, and an additional store may need to be of a broadly comparable scale in order to provide an attractive offer. There is also scope for additional retail and service units, a post office, a GPs' surgery and banking facilities or ATMs to be provided as part of any future development. We would also suggest, based on the likely population of the planned SUE and the current distribution of such facilities across Lincoln, that there may also be opportunity to accommodate a library within the development.

6.08 Given the size of the planned SUE and the scale of provision proposed, there may be potential to accommodate two separate groups of facilities – one focused around a food superstore and one focused around a significantly more modest local needs convenience store. We consider that the larger centre would likely be located towards the south or east of the SUE in order to be accessible to a greater potential catchment which includes parts of the existing population of Lincoln. The smaller centre would likely be positioned towards the western part of the SUE.

6.09 We consider that the larger centre has the potential to also accommodate around ten to fifteen other moderately sized units and that the smaller grouping of facilities would more likely accommodate around five units. The smaller group of shops could well be deemed a **local parade** in planning policy terms, with the larger grouping being either having the potential to be a **district centre**, depending on the mix of uses secured.

Lincoln South East Quadrant

6.10 At Lincoln South East Quadrant we estimate there to be a requirement for between 200 sq.m and 310 sq.m of small format net convenience floorspace at 2031, rising to a need for between 430 sq.m and 670 sq.m on completion of the SUE. Such provision could be provided through a single store or through two stores should operators wish to ensure that their operation is not restricted by Sunday trading restrictions (shops with a net sales area greater than 280 sq.m are the subject of rules governing restricted opening times).

6.11 As with the Western Growth Corridor SUE, we also consider that there to be the potential for a main food shopping store to be accommodated within the SUE which would cater for both the SUE and the wider catchment (including Bracebridge Heath, Canwick and Branston). We note that the nearby Tesco store at Canwick Road has a net sales area of 2,465 sq.m and we would again anticipate that any additional store would be of a broadly comparable scale in order to be attractive to potential operators. The SUE also has clear potential to accommodate additional retail and service uses, a post office, a GPs' surgery and banking facilities or ATMs. Once again, based on the likely population of the planned SUE and the current distribution of such facilities across Lincoln, we also consider there to be the potential to accommodate a new library within the development.

6.12 Given the size of the planned SUE and the scale of provision proposed, we consider there to again be a possibility for two groups of facilities to be provided – one focused around a food superstore and likely located towards the western part of the SUE and the other focused around a local needs convenience store and likely located towards its eastern part.

6.13 Once more, we consider that the larger group of facilities has the potential to also accommodate around ten to fifteen other moderately sized units and that the smaller grouping of facilities would more likely accommodate around five units. The smaller group of shops would once again be akin to a **local parade** in character, with the larger grouping of shops and services having the potential to act as a **district centre**, depending once again on the mix of uses secured.

Lincoln North East Quadrant

6.14 We have identified an estimated need for between just 80 sq.m and 120 sq.m of additional small format convenience sales floorspace to support the Lincoln North East SUE, which is, in part, a consequence of the SUE's accessibility to existing provision at the Carlton Centre and at Wragby Road and Searby Road.

6.15 We consider there to be scope for such a single, small convenience store to be supplemented by a very limited number of additional units and, potentially, a GPs' surgery. This part of Lincoln is relatively poorly served by existing libraries and, as a consequence, further consideration could be given to the most appropriate means by which the library service can be accessed by the SUE's future population. We would envisage that the most appropriate location for a small grouping of shops and services would be towards the centre of the site (or slightly further south), detached from the nearby Carlton Centre. In our view, such provision could take the form of an undesignated **local shopping parade**. However, it is noted that Allenby Industrial Estate is located a short distance to the south of the site and that the Lincoln Bypass is approved and will pass directly to the east. Accordingly, there may well be the possibility that increased activity and custom will result from these two factors which could provide for a level of inflow beyond the 30% accounted for at Table 5.3 of this report. As a consequence, the SUE is considered to have potential to accommodate a larger grouping of shops and services which could perform the function of a local centre.

Gainsborough Southern Neighbourhood

6.16 We estimate there to be a need for between 170 sq.m and 270 sq.m of small format convenience sales floorspace to serve the Gainsborough Northern Neighbourhood SUE at 2031.

6.17 Whilst this is substantially less than the level of floorspace proposed by extant outline planning permission reference 125020, we note than the consented scheme provides for a foodstore of a scale which will support some main food shopping journeys (such shopping trips are not included in quantitative analysis set out in this report, which is concerned with 'top up' convenience shopping only). The foodstore which is planned to come forward as part of the Southern Neighbourhood SUE will have the potential to serve a wider catchment area than that covered by the SUE itself and the proposal is therefore not considered to be inconsistent with the findings of this study. Moreover, the quantum of floorspace proposed is not at a level which is likely to result in any significant adverse impact on any existing centre. We note that the extant permission also provides for a GPs' surgery, other local needs facilities, and a primary school.

Gainsborough Northern Neighbourhood

6.18 We estimate there to be a need for between 130 sq.m and 210 sq.m of small format convenience sales floorspace to serve the Gainsborough Northern Neighbourhood SUE at 2031. Our estimate takes into consideration the recent development of the Tillbridge Centre at Corringham Road, which provides a small Spar convenience store, together with a limited number of complementary uses, which has the potential to serve those residing towards the south of the SUE. We would envisage that any further provision would comprise a group of retail or service units of a comparable scale to the Tillbridge Centre facility (around five or so units in total, possibly including a post office) and would be located in the central part of the planned SUE. We consider the future population of the SUE to be sufficiently large to have the potential to support a GPs' surgery as part of the development. We consider that such a facility would have the potential to act as a **local centre.**

Gainsborough Eastern Neighbourhood

6.19 Our methodology indicates an estimated need for between 140 sq.m and 230 sq.m of small format convenience sales floorspace to serve the Gainsborough Eastern Neighbourhood SUE at 2031. We consider that such provision would be located in the central part of the site and could be accompanied by a limited number (around five) of additional units, one of which could have the potential to accommodate a post office. We also consider that the Eastern Neighbourhood has the potential to support a GPs' surgery, subject to confirmation of patient needs by the clinical commissioning group. Once again, we consider that such a facility would have the potential to act as a **local centre.**

Sleaford South Quadrant

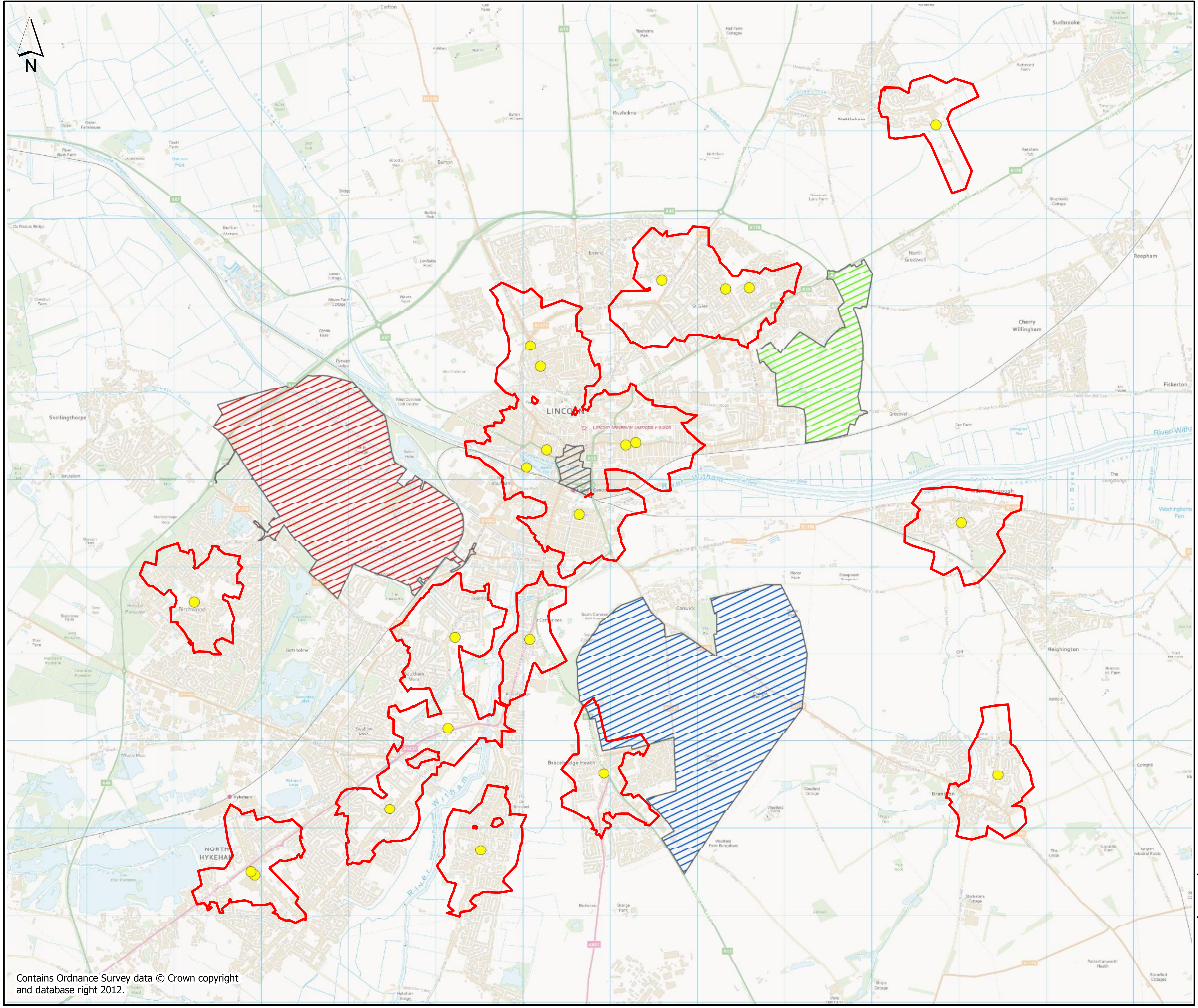
6.20 We estimate there to be a need for between 190 sq.m and 290 sq.m of small format convenience sales floorspace to serve Sleaford South Quadrant (and the adjacent Quarrington neighbourhood) at 2031. We envisage that any such provision would be located directly to the south east of London Road and could also include a limited number (likely to be no more than five) additional units which could accommodate a post office and other local needs retailers or services. We consider that the London Road location would help underpin the commercial viability of such additional units. We also consider there to be some scope to provide an additional GPs' surgery as part of the development, particularly as such provision would also have the potential to serve residents of Quarrington district. Such a facility would again likely perform a **local centre** function.

Sleaford West Quadrant

6.21 We estimate there to be a need for between 120 sq.m and 190 sq.m of small format convenience sales floorspace as part of the Sleaford West Quadrant development at 2031. Given the geography of this part of Sleaford, and the fact that existing local service provision is already located at Lincoln Road to the east of the site, we consider it appropriate for further provision to be 'embedded' within the planned SUE. Accordingly, we consider that any grouping of facilities will be of a modest scale and likely incorporate a small convenience store, together a GPs' surgery and, subject to commercial interest, a very small number of additional commercial units (five or less). Given the scale of retail need identified and our recommendation in respect of the siting of such provision, we consider that the development would likely take the form of an undesignated **local shopping parade.**

Appendices

Appendix I – Plans Identifying the Location of Key Attractors and Facilities in Relation to Lincoln SUEs



Legend

- GP Surgery
- 800m Pedestrian Catchment
- Central Shopping Core
- Lincoln North East Quadrant
- Lincoln South East Quadrant
- Lincoln Western Growth Corridor

Notes

* Links without pedestrian footway provision are excluded from the catchments

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TEL: +44 (0)161 835 2400
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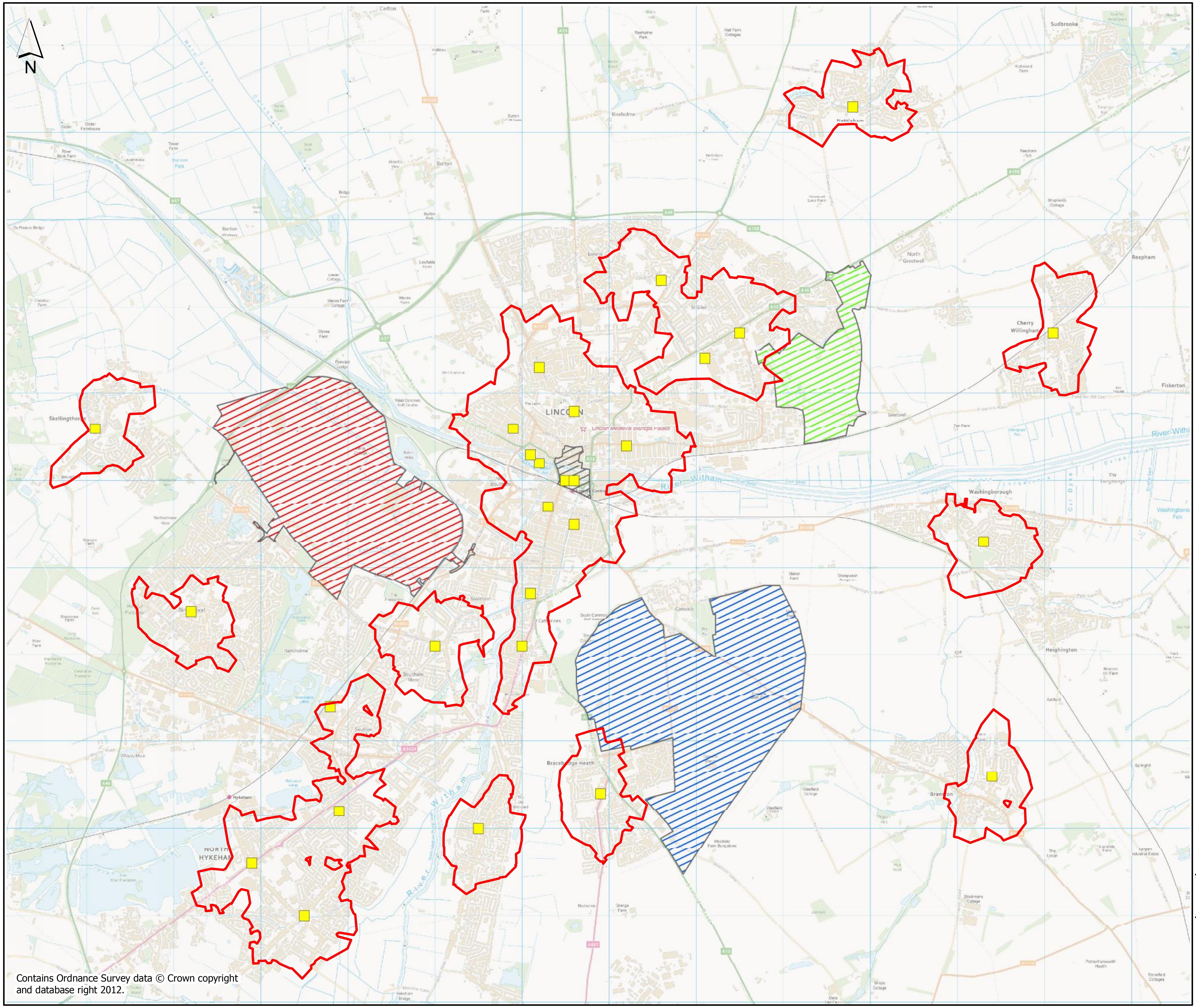
SUE Study - Lincoln

Location of GP Surgeries with 800m Pedestrian Catchments

Scale @ A3 1:40,000 | Plan 1



Legend

- Pharmacy
- 800m Pedestrian Catchment
- Central Shopping Core
- Lincoln North East Quadrant
- Lincoln South East Quadrant
- Lincoln Western Growth Corridor

Notes

* Links without pedestrian footway provision are excluded from the catchments

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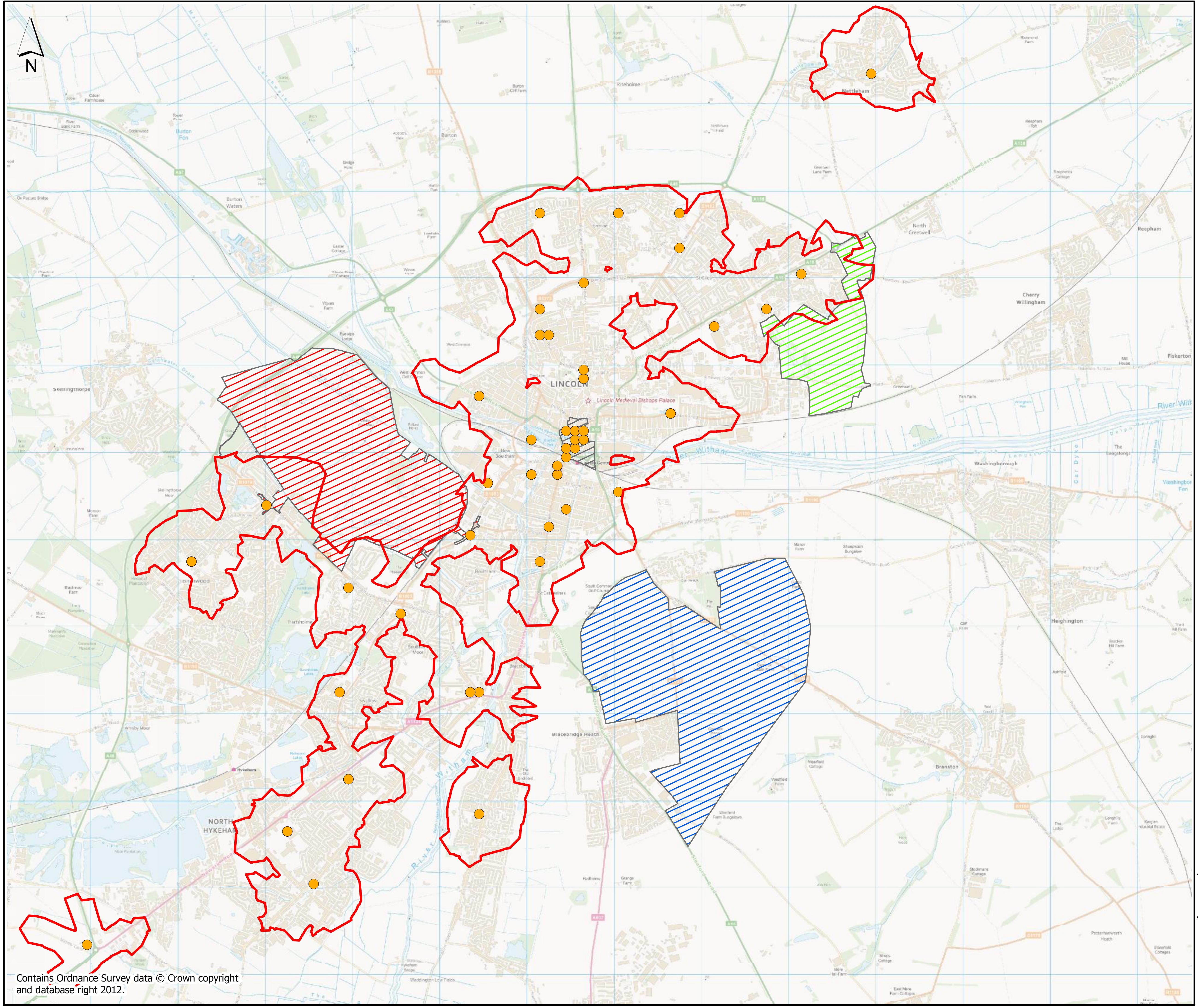
SUE Study - Lincoln

Location of Pharmacies with 800m Pedestrian Catchments

Scale @ A3 1:40,000

Plan 2



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Legend

- Bank / ATM
- 800m Pedestrian Catchment
- Central Shopping Core
- Lincoln North East Quadrant
- Lincoln South East Quadrant
- Lincoln Western Growth Corridor

Notes

* Links without pedestrian footway provision are excluded from the catchments

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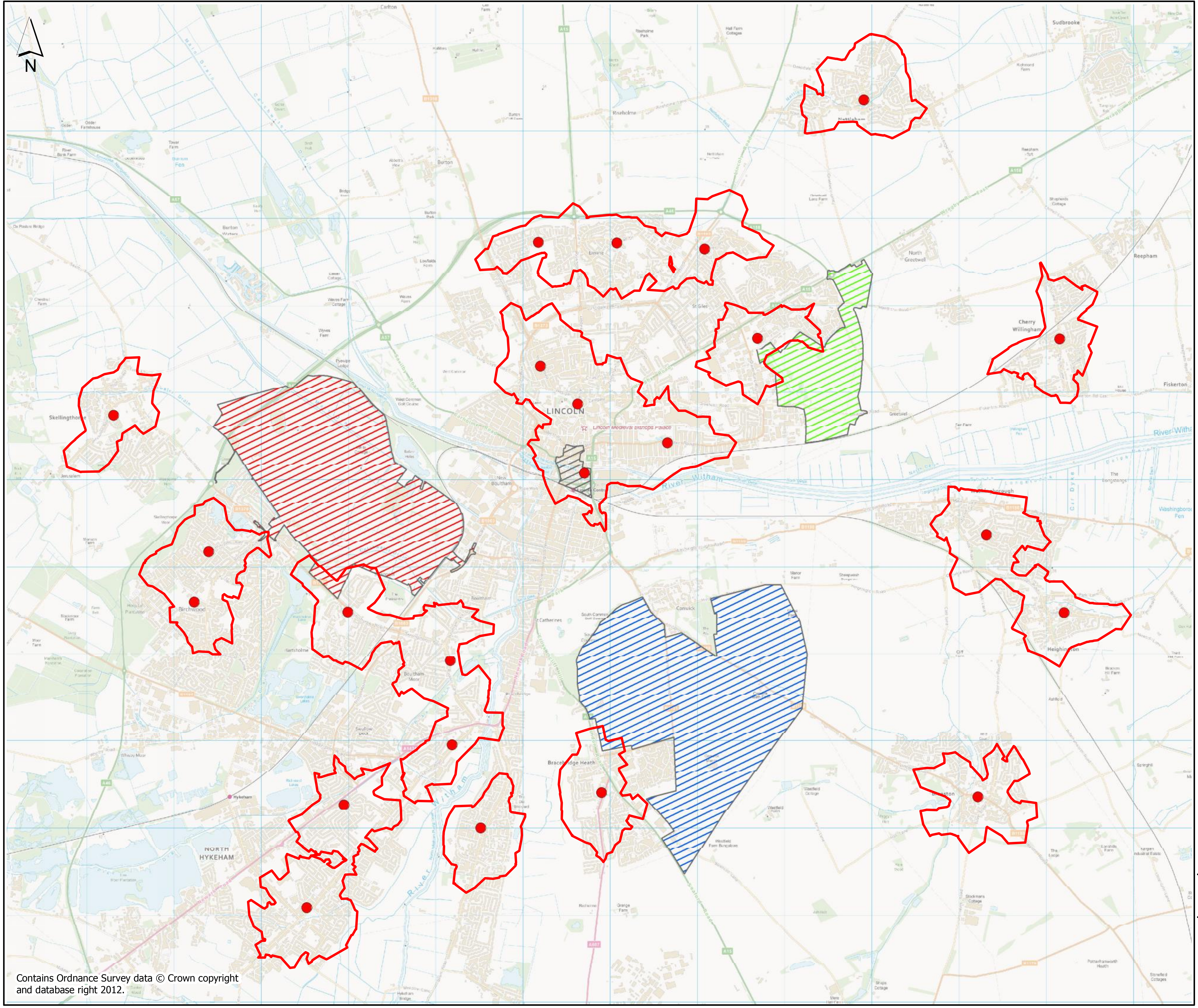
SUE Study - Lincoln

Location of Banks and ATMs with 800m Pedestrian Catchments

Scale @ A3 1:40,000 | Plan 3



Legend

- Post Office
- 800m Pedestrian Catchment
- Central Shopping Core
- Lincoln North East Quadrant
- Lincoln South East Quadrant
- Lincoln Western Growth Corridor

Notes

* Links without pedestrian footway provision are excluded from the catchments

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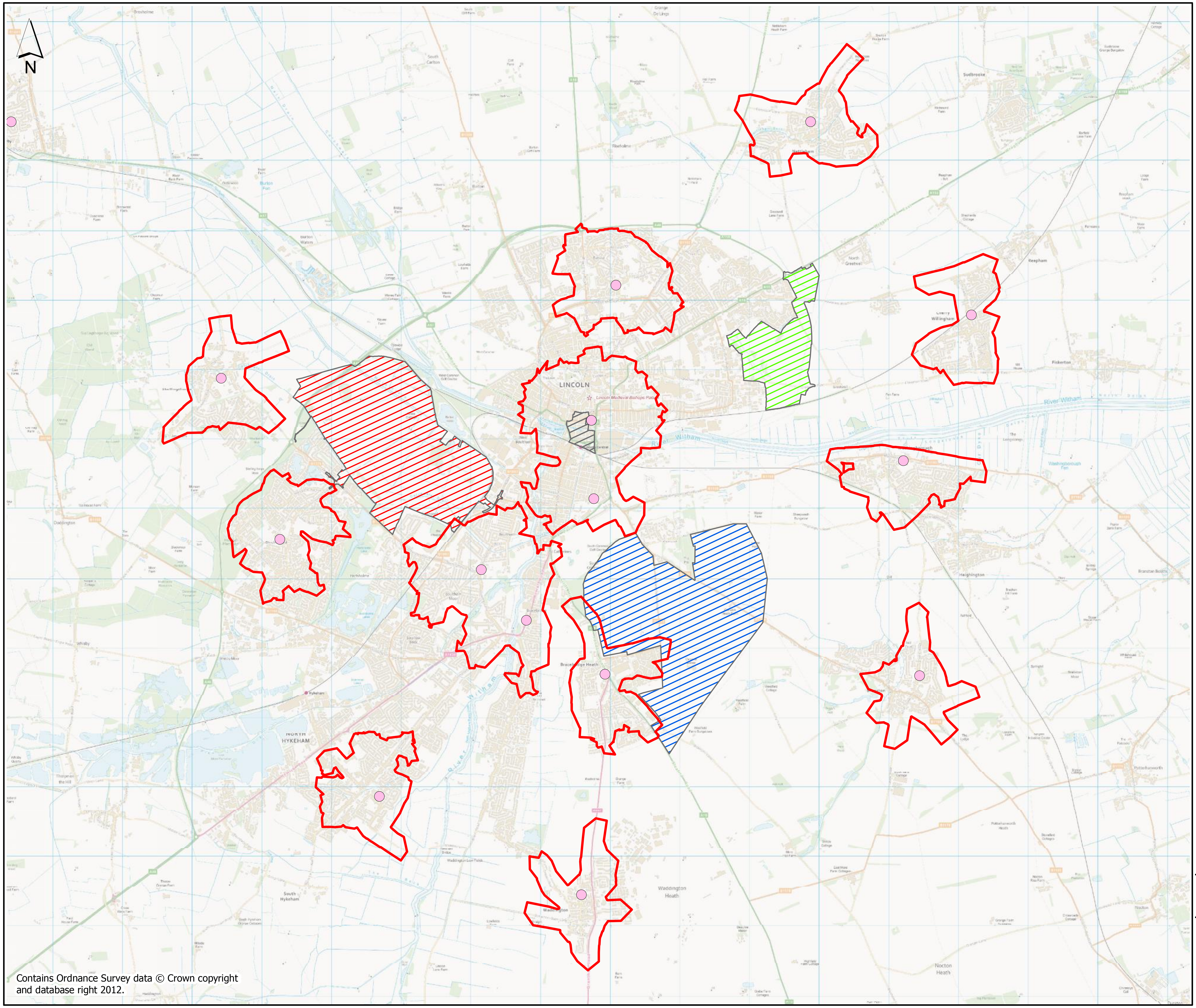
SUE Study - Lincoln

Location of Post Offices with 800m Pedestrian Catchments

Scale @ A3 1:40,000 | Plan 4



Legend

- Library
- 1200m Pedestrian Catchment
- Central Shopping Core
- Lincoln North East Quadrant
- Lincoln South East Quadrant
- Lincoln Western Growth Corridor

Notes

* Links without pedestrian footway provision are excluded from the catchments

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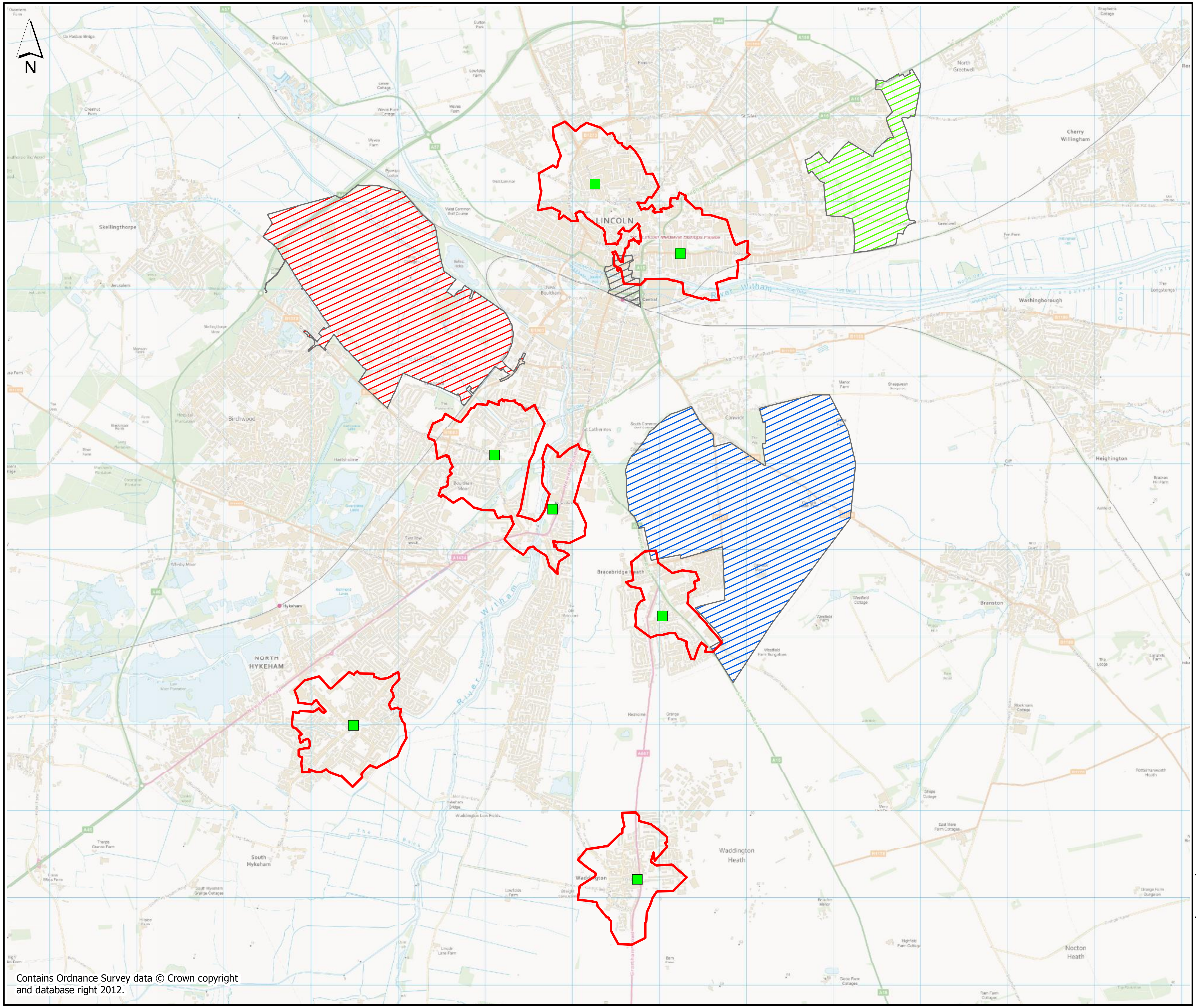
SUE Study - Lincoln

Location of Libraries with 1200m Pedestrian Catchments

Scale @ A3 1:50,000

Plan 5



Legend

- Neighbourhood Centre
- 800m Pedestrian Catchment
- Central Shopping Core
- Lincoln North East Quadrant
- Lincoln South East Quadrant
- Lincoln Western Growth Corridor

Notes

* Links without pedestrian footway provision are excluded from the catchments

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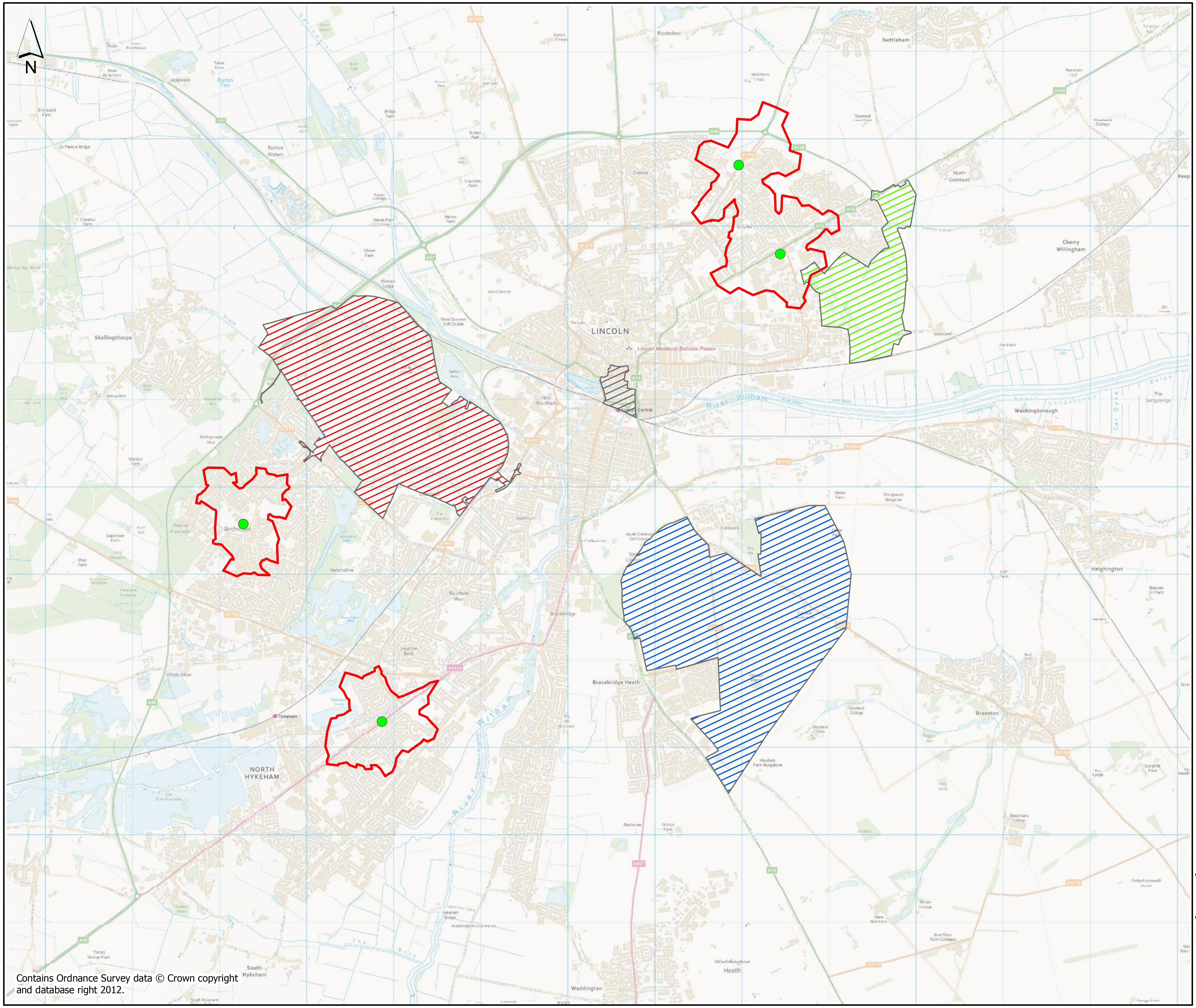
SUE Study - Lincoln

Location of Neighbourhood Centres with 800m Pedestrian Catchments

Scale @ A3 1:40,000

Plan 6



Legend

- District Centre
- 800m Pedestrian Catchment
- Central Shopping Core
- Lincoln North East Quadrant
- Lincoln South East Quadrant
- Lincoln Western Growth Corridor

Notes

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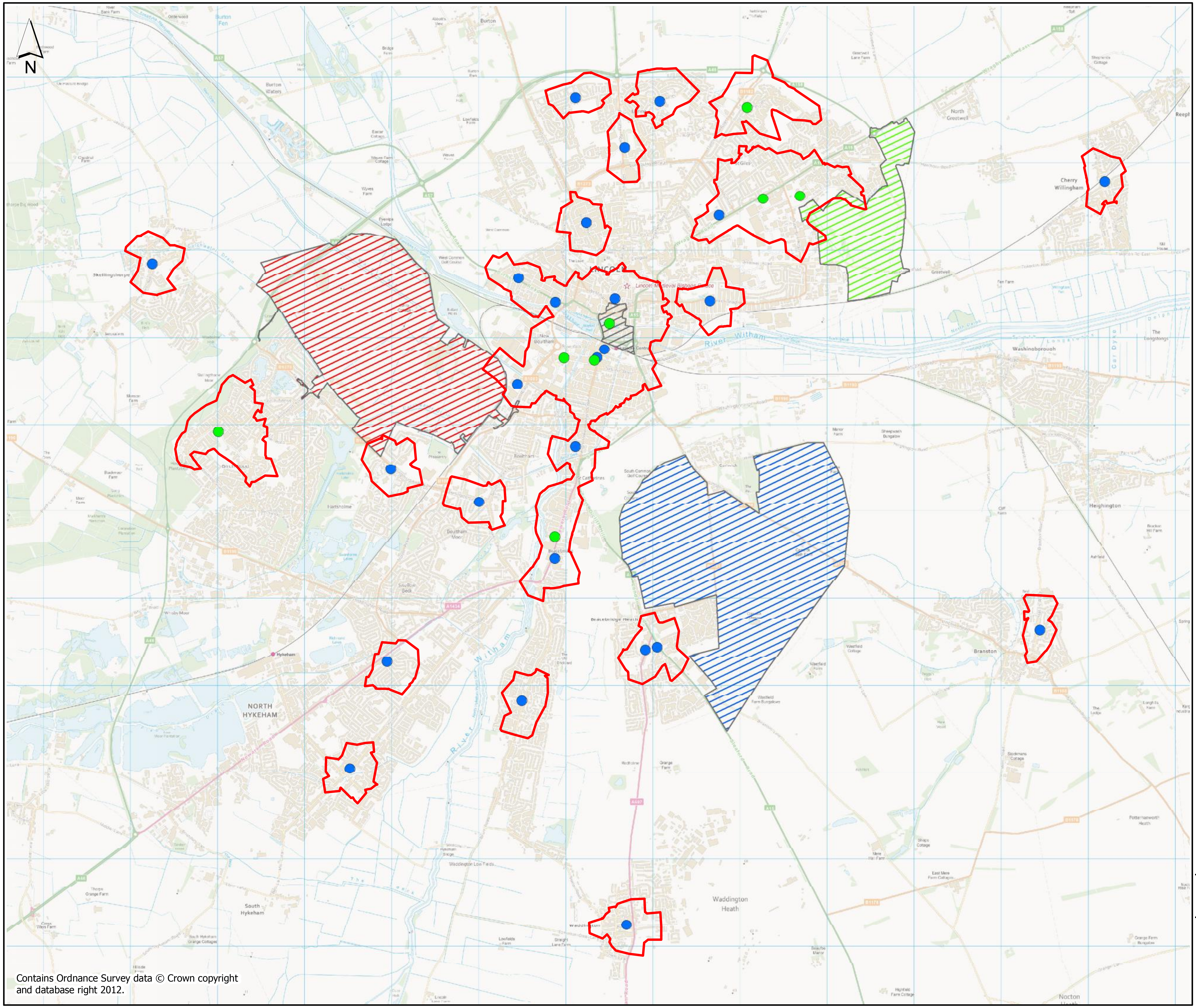
SUE Study - Lincoln

Location of District Centres with 800m Pedestrian Catchments

Scale @ A3 1:40,000 | Plan 7



Legend

- Food store with sales area up to 500 sqm
- Food store with sales area between 500 > 1500 Sqm
- 400m & 800m Pedestrian catchment
- Central Shopping Core
- Lincoln North East Quadrant
- Lincoln South East Quadrant
- Lincoln Western Growth Corridor

Notes

*Catchment of 400m around food store with sales area of up to 500 sqm.

*Catchment of 800m around food store with sales area between 500-1500 sqm.

*Catchments exclude links with no pedestrian footway provision.

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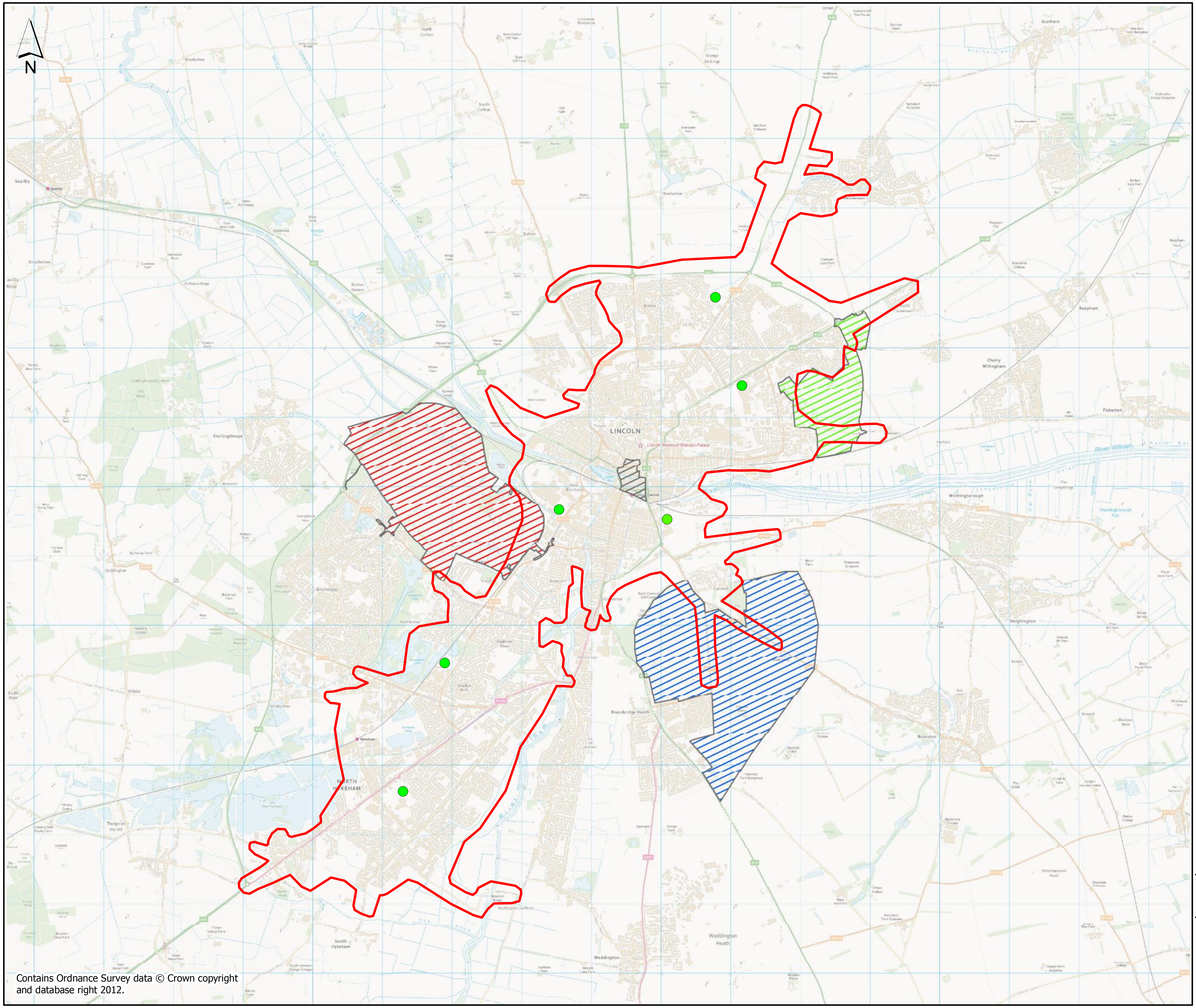
SUE Study - Lincoln

Location of Food Stores with up to 1,500 Sqm with Pedestrian Catchments

Scale @ A3 1:40,000 | Plan 8



Legend

- Food store with sales area greater than 1,500 Sqm
- Five minute drive time isochrone
- Central Shopping Core
- Lincoln North East Quadrant
- Lincoln South East Quadrant
- Lincoln Western Growth Corridor

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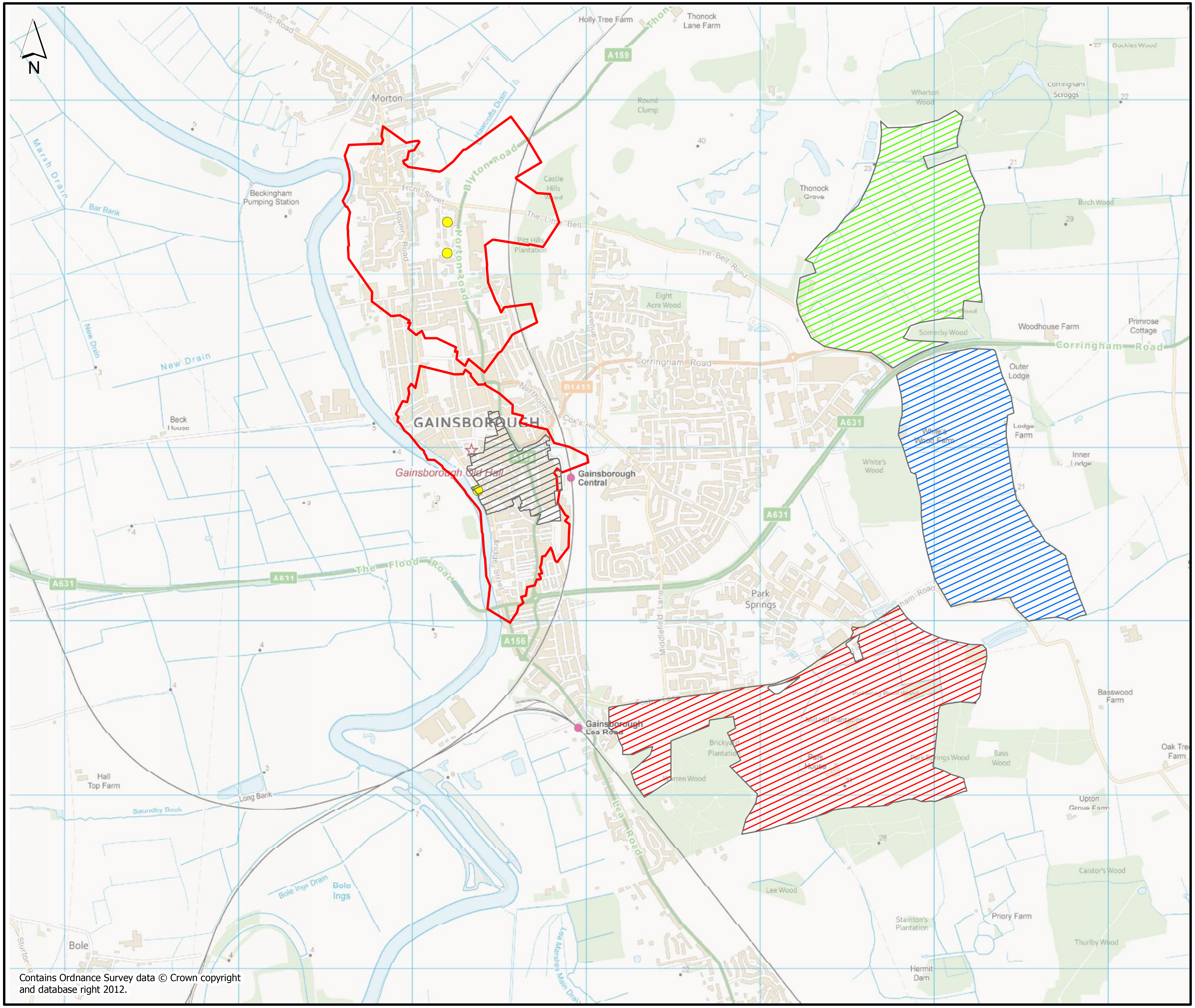
SUE Study - Lincoln

Location of food stores with sales area greater than 1,500 Sqm & 5 minute Drive time Isochrones

Scale @ A3 1:50,000	Plan 9

Appendix II – Plans Identifying the Location of Key Attractors and Facilities in Relation to Gainsborough SUEs



Legend

- GP Surgery
- 800m Pedestrian Catchment
- Gainsborough Town Centre
- Gainsborough Southern Neighbourhood
- Gainsborough Eastern Neighbourhood
- Gainsborough Northern Neighbourhood

Notes

* Links without pedestrian footway provision are excluded from the catchments

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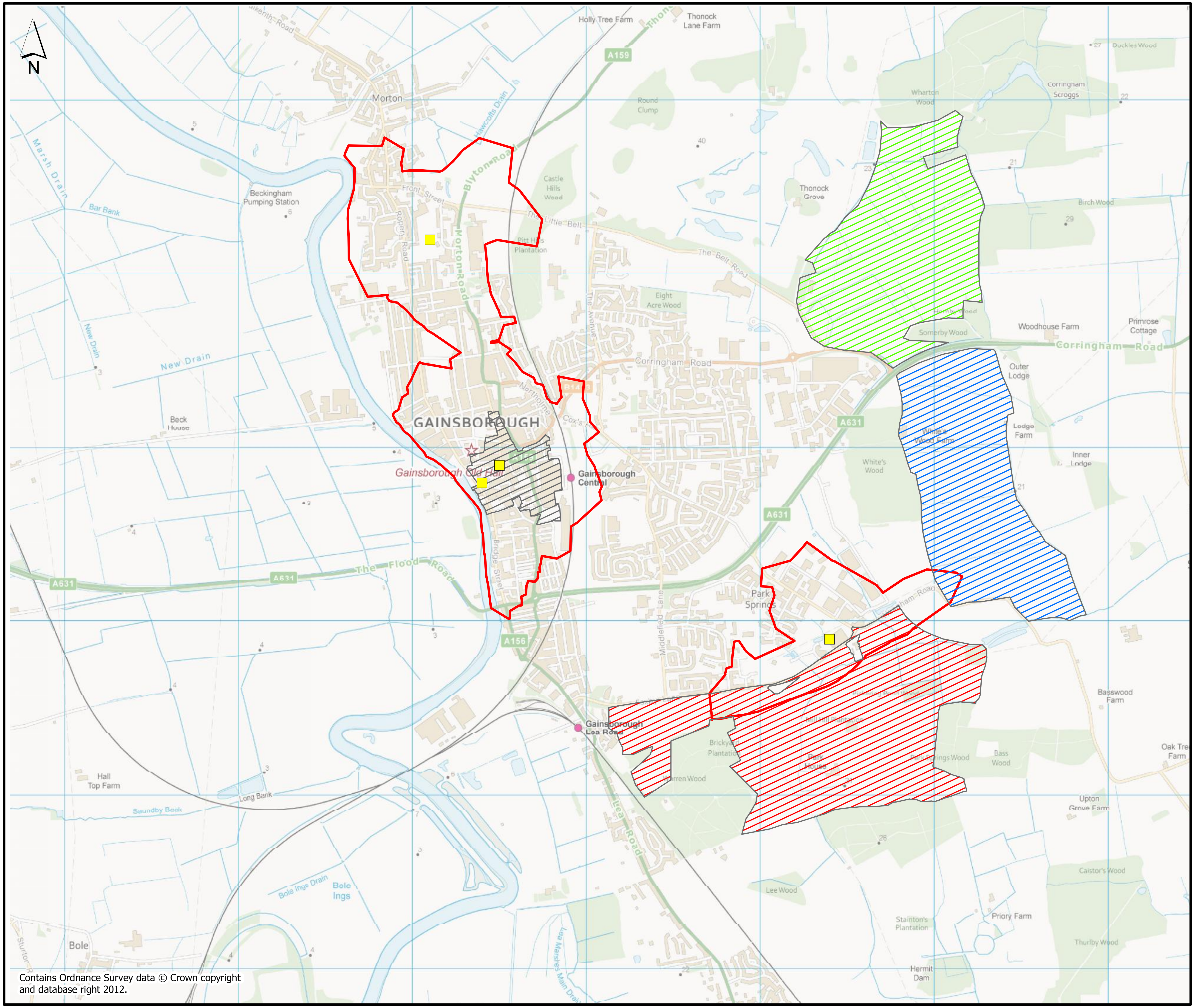
SUE Study - Gainsborough

Location of GP Surgeries with 800m Pedestrian Catchments

Scale @ A3 1:20,000	Plan 1



Legend

- Pharmacy
- 800m Pedestrian Catchment
- Gainsborough Town Centre
- Gainsborough Southern Neighbourhood
- Gainsborough Northern Neighbourhood
- Gainsborough Eastern Neighbourhood

Notes

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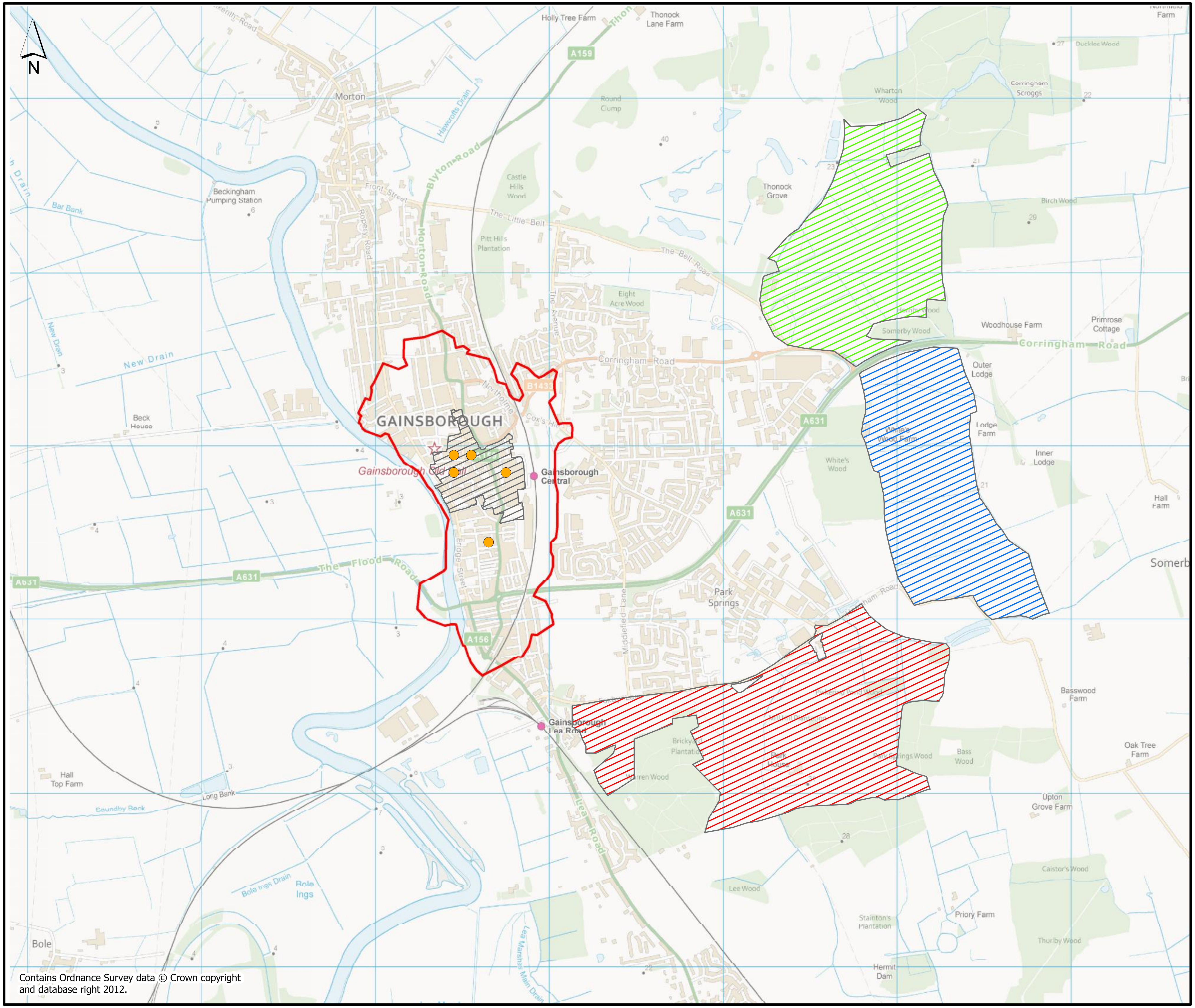
SUE Study - Gainsborough

Location of Pharmacies with 800m Pedestrian Catchments

Scale @ A3 1:20,000	Plan 2



Legend

- Bank / ATM
- 800m Pedestrian Catchment
- Gainsborough Town Centre
- Gainsborough Southern Neighbourhood
- Gainsborough Northern Neighbourhood
- Gainsborough Eastern Neighbourhood

Notes

* Links without pedestrian footway provision are excluded from the catchments

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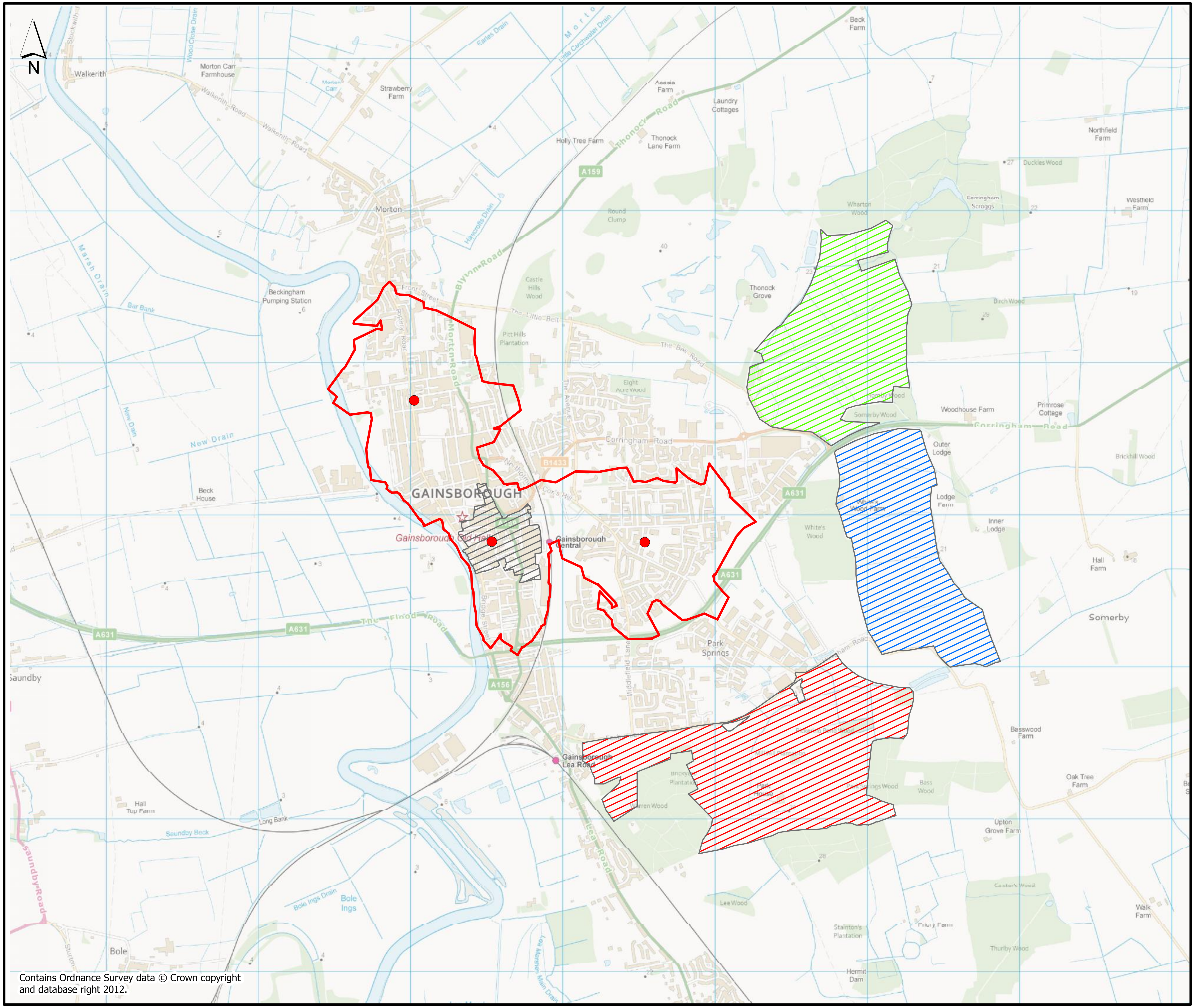
SUE Study - Gainsborough

Location of Banks & ATMs with 800m Pedestrian Catchments

Scale @ A3 1:20,000

Plan 3



Legend

- Post Office
- 800m Pedestrian Catchment
- Gainsborough Town Centre
- Gainsborough Southern Neighbourhood
- Gainsborough Northern Neighbourhood
- Gainsborough Eastern Neighbourhood

Notes

* Links without pedestrian footway provision are excluded from the catchments

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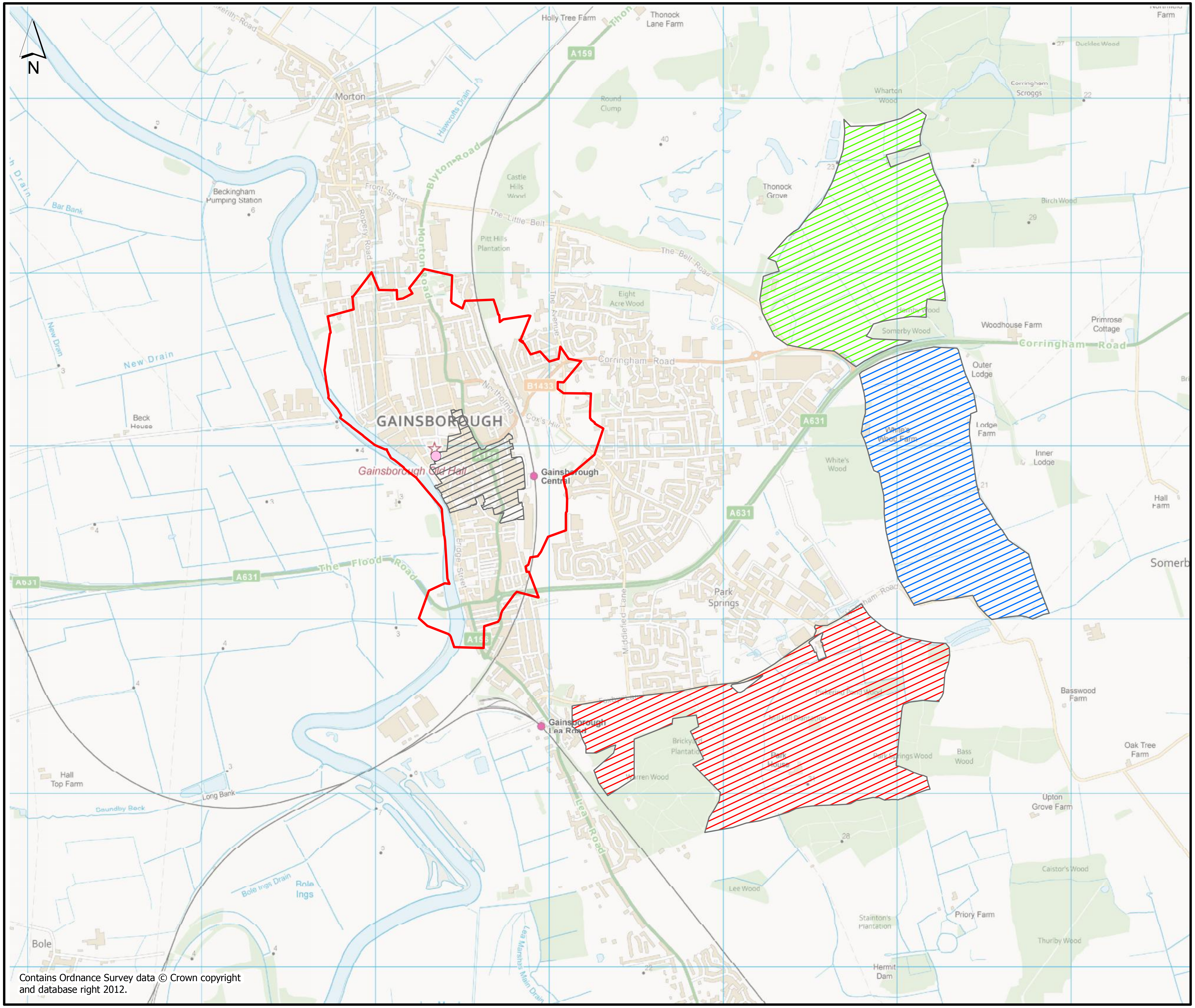
SUE Study - Gainsborough

Location of Post Offices with 800m Pedestrian Catchments

Scale @ A3 1:22,848

Plan 4



Legend

- Library
- 1200m Pedestrian Catchment
- Gainsborough Town Centre
- Gainsborough Southern Neighbourhood
- Gainsborough Northern Neighbourhood
- Gainsborough Eastern Neighbourhood

Notes

* Links without pedestrian footway provision are excluded from the catchments

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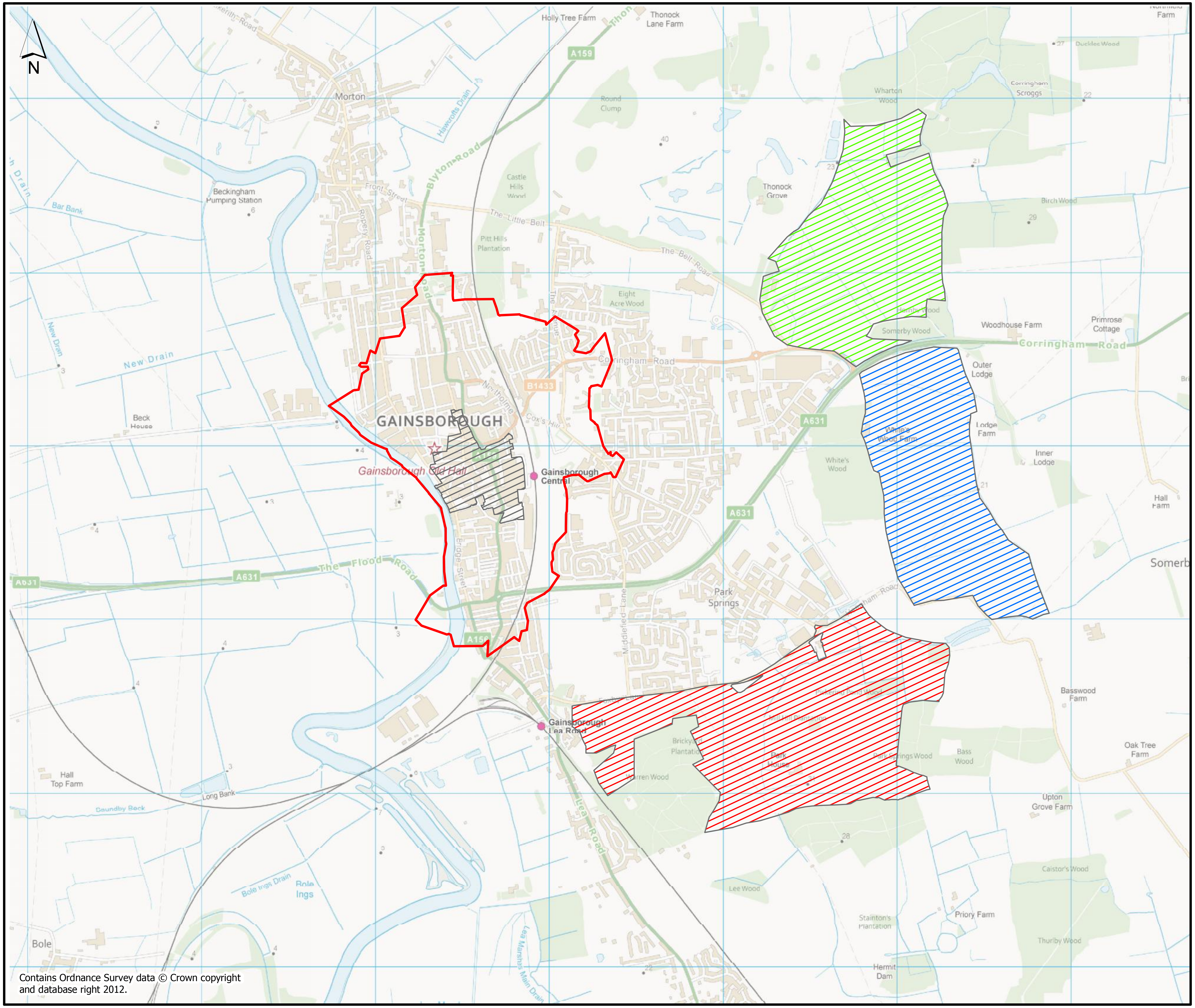
SUE Study - Gainsborough

Location of Libraries with 1200m Pedestrian Catchments

Scale @ A3 1:20,000

Plan 5



Legend

- Gainsborough Town Centre
- 800m Pedestrian Catchment
- Gainsborough Southern Neighbourhood
- Gainsborough Northern Neighbourhood
- Gainsborough Eastern Neighbourhood

Notes

* Links without pedestrian footway provision are excluded from the catchments

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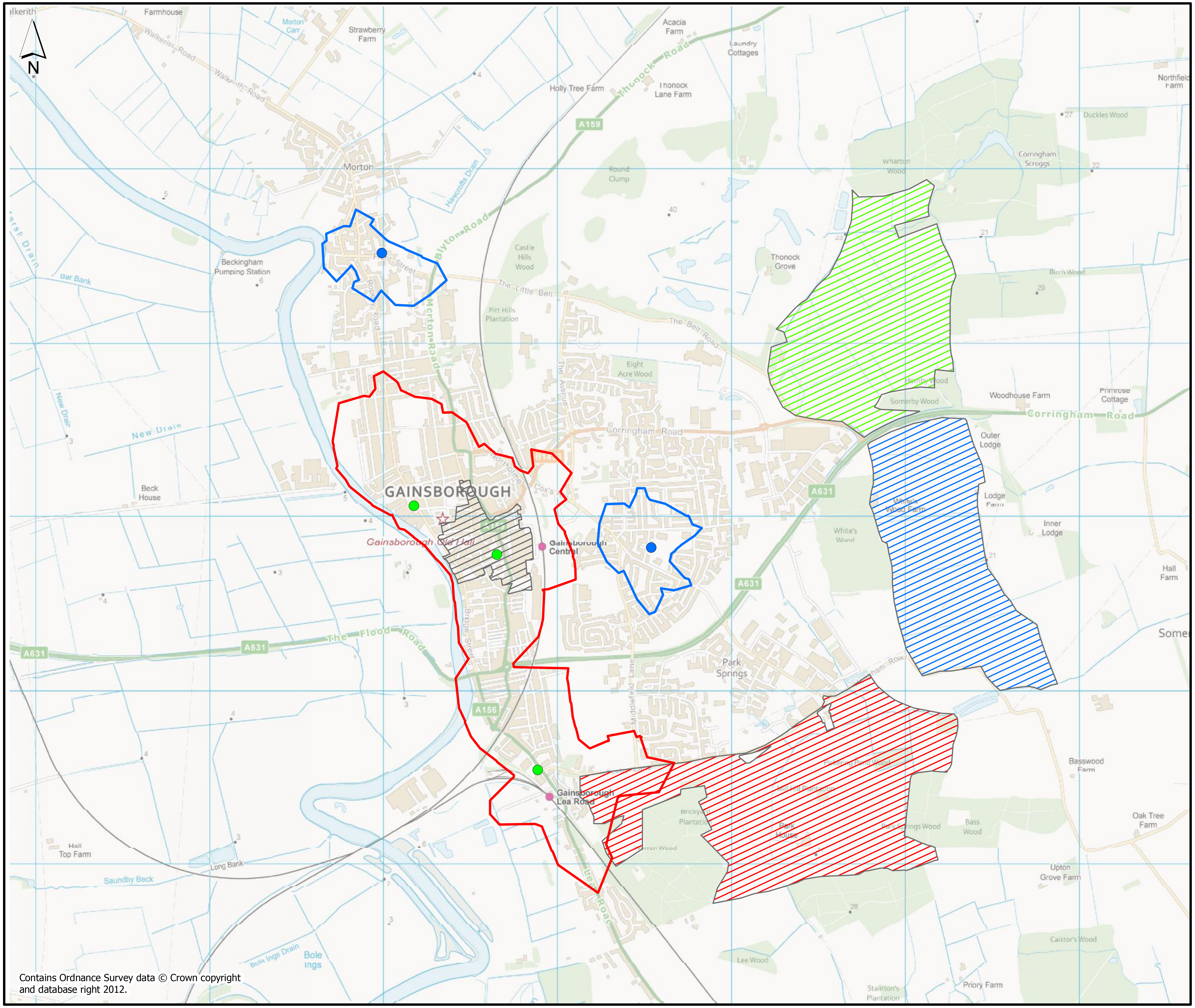
SUE Study - Gainsborough

Location of Gainsborough Town Centre with 800m Pedestrian Catchments

Scale @ A3 1:20,000

Plan 6



Legend

- Food store with sales area up to 500 sqm
- Food store with sales area between 500 > 1500 Sqm
- 400m Pedestrian Catchment
- 800m Pedestrian catchment
- Gainsborough Town Centre
- Gainsborough Southern Neighbourhood
- Gainsborough Northern Neighbourhood
- Gainsborough Eastern Neighbourhood

Notes

*Catchment of 400m around food store with sales area of up to 500 sqm.

*Catchment of 800m around food store with sales area between 500-1500 sqm.

*Catchments exclude links with no pedestrian footway provision.

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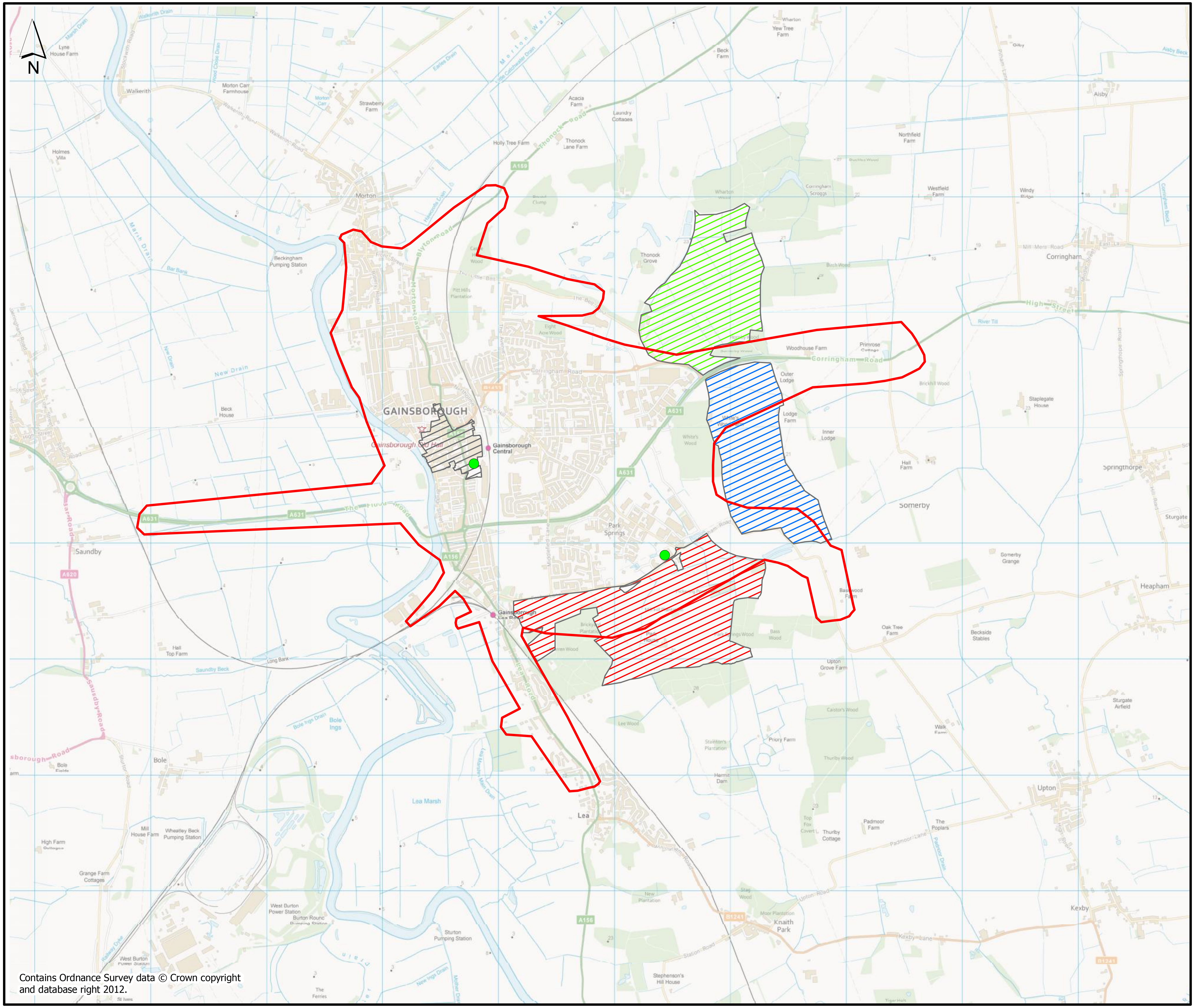
SUE Study - Gainsborough

Location of food stores with sales area up to 1,500 sqm with Pedestrian Catchments

Scale @ A3 1:20,000

Plan 7



Legend

- Food store with sales area greater than 1,500 Sqm
- Five minute drive time isochrone
- Gainsborough Town Centre
- Gainsborough Southern Neighbourhood
- Gainsborough Northern Neighbourhood
- Gainsborough Eastern Neighbourhood

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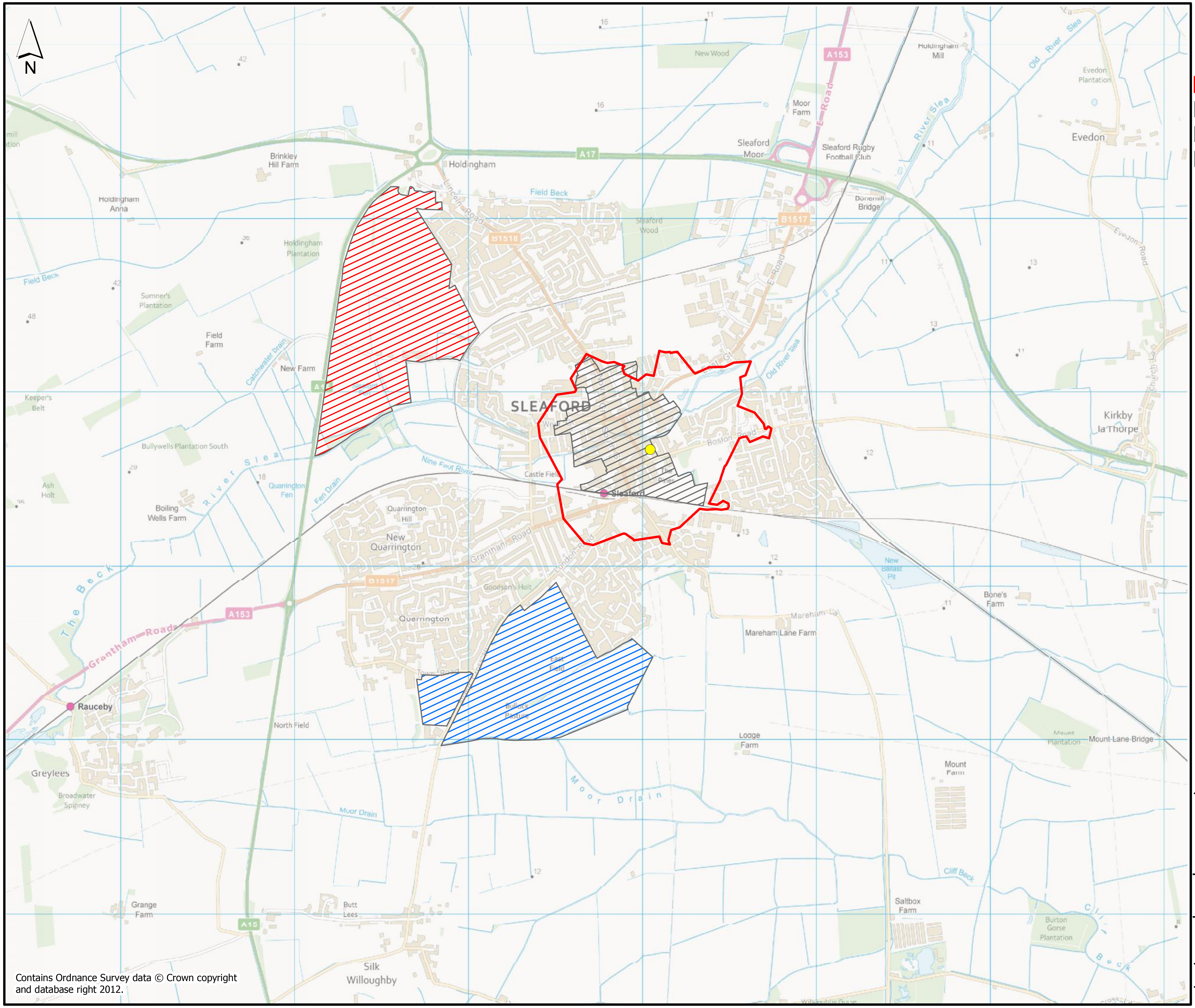
SUE Study - Gainsborough

Location of food stores with sales area greater than 1,500 Sqm & 5 minute Drive time Isochrones

Scale @ A3 1:30,000	Plan 8

Appendix III – Plans Identifying the Location of Key Attractors and Facilities in Relation to Sleaford SUEs



Legend

- GP Surgery
- 800m Pedestrian Catchment
- Sleaford Town Centre
- Sleaford South Quadrant
- Sleaford West Quadrant

Notes

* Links without pedestrian footway provision are excluded from the catchments

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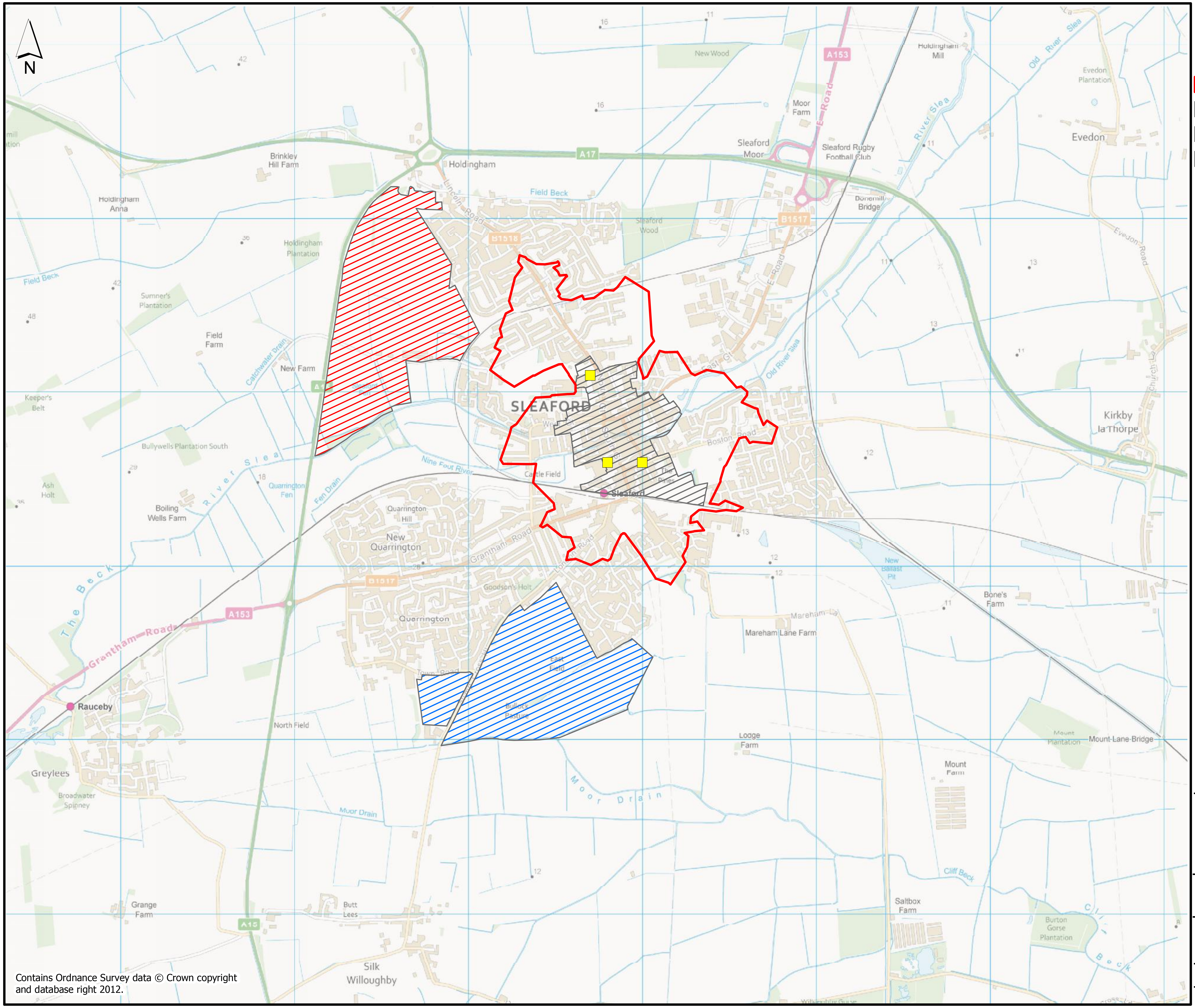
SUE Study - Sleaford

Location of GP Surgeries with 800m Pedestrian Catchments

Scale @ A3 1:20,000

Plan 1



Legend

- Pharmacy
- 800m Pedestrian Catchment
- Sleaford Town Centre
- Sleaford South Quadrant
- Sleaford West Quadrant

Notes

* Links without pedestrian footway provision are excluded from the catchments

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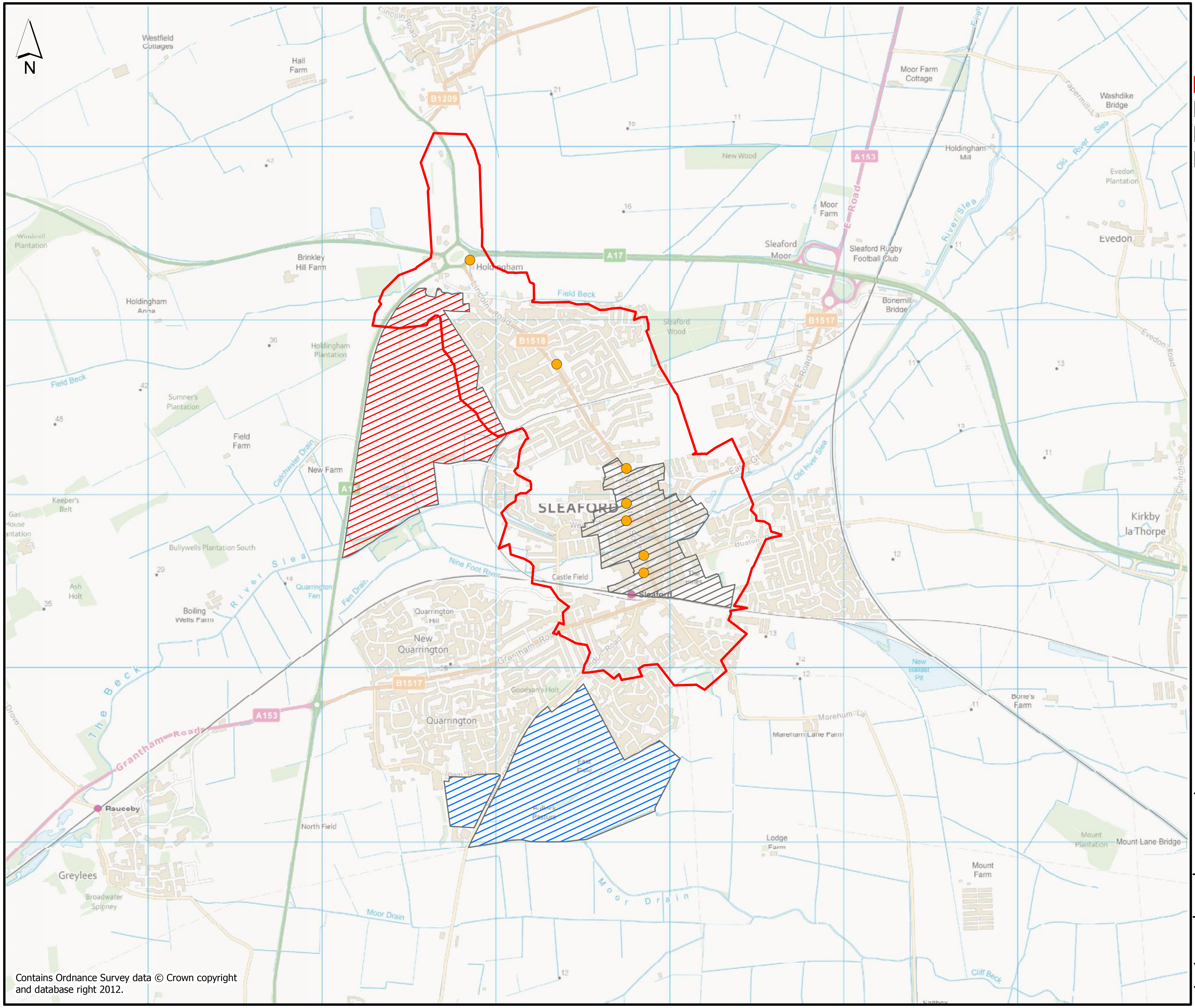
SUE Study - Sleaford

Location of Pharmacies with 800m Pedestrian Catchments

Scale @ A3 1:20,000 | Plan 2



Legend

- Bank / ATM
- 800m Pedestrian Catchment
- Sleaford Town Centre
- Sleaford South Quadrant
- Sleaford West Quadrant

Notes

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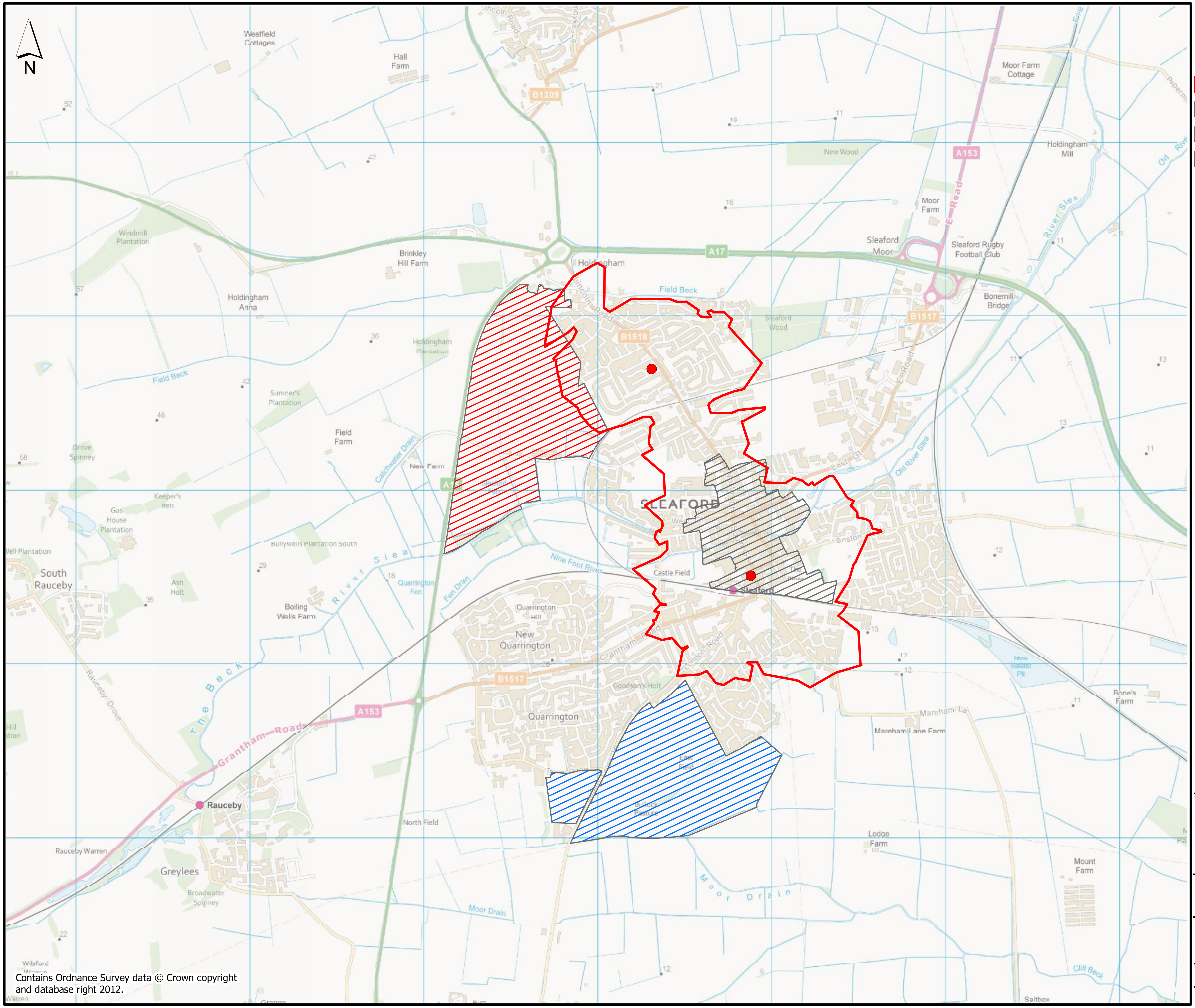
SUE Study - Sleaford

Location of Banks and ATMs with 800m Pedestrian Catchments

Scale @ A3 1:20,000	Plan 3



Legend

- Post Office
- 800m Pedestrian Catchment
- Sleaford Town Centre
- Sleaford South Quadrant
- Sleaford West Quadrant

Notes

* Links without pedestrian footway provision are excluded from the catchments

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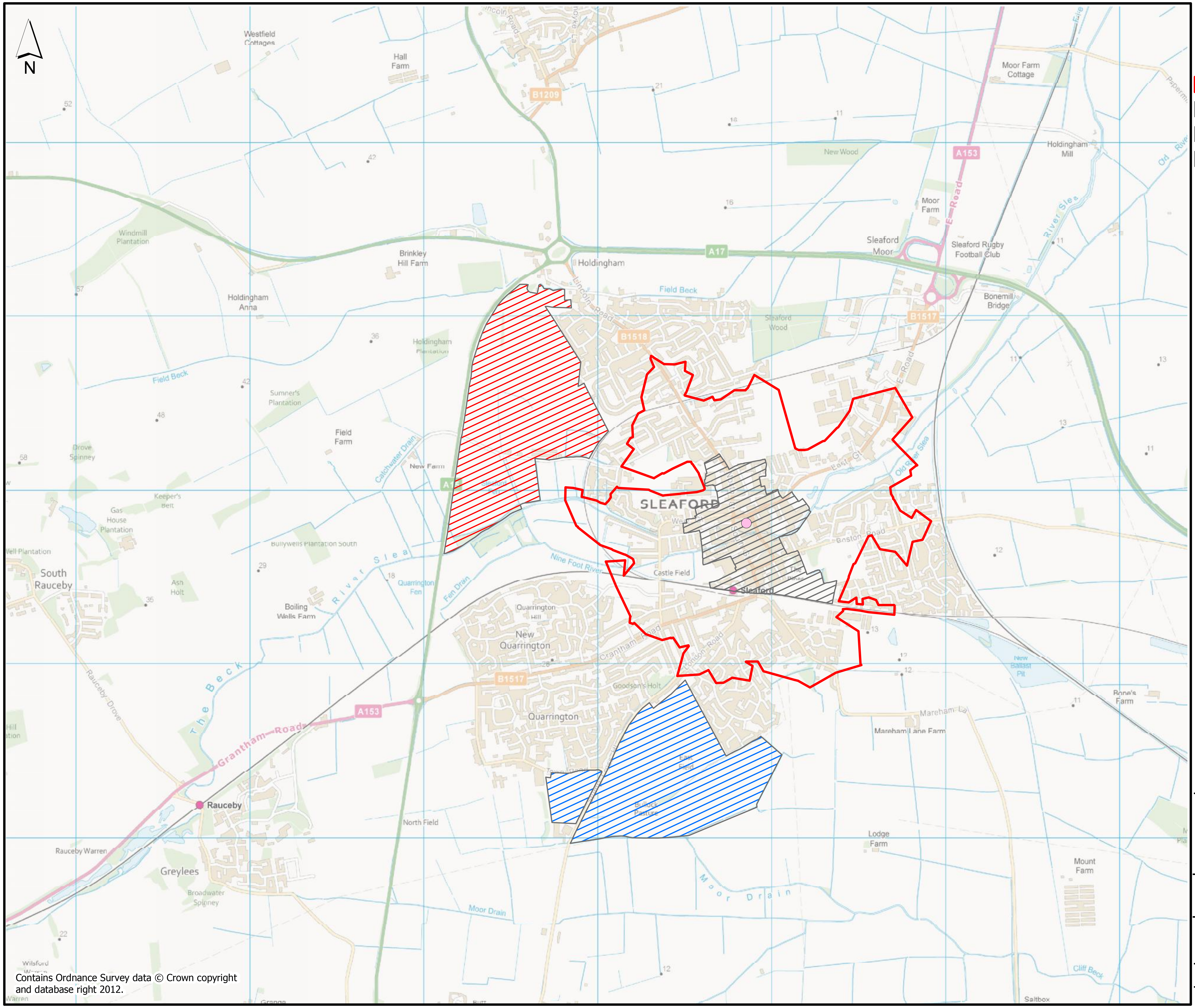
SUE Study - Sleaford

Location of Post Offices with 800m Pedestrian Catchments

Scale @ A3 1:20,000	Plan 4



Legend

- Library
- 1200m Pedestrian Catchment
- Sleaford Town Centre
- Sleaford South Quadrant
- Sleaford West Quadrant

Notes

* Links without pedestrian footway provision are excluded from the catchments

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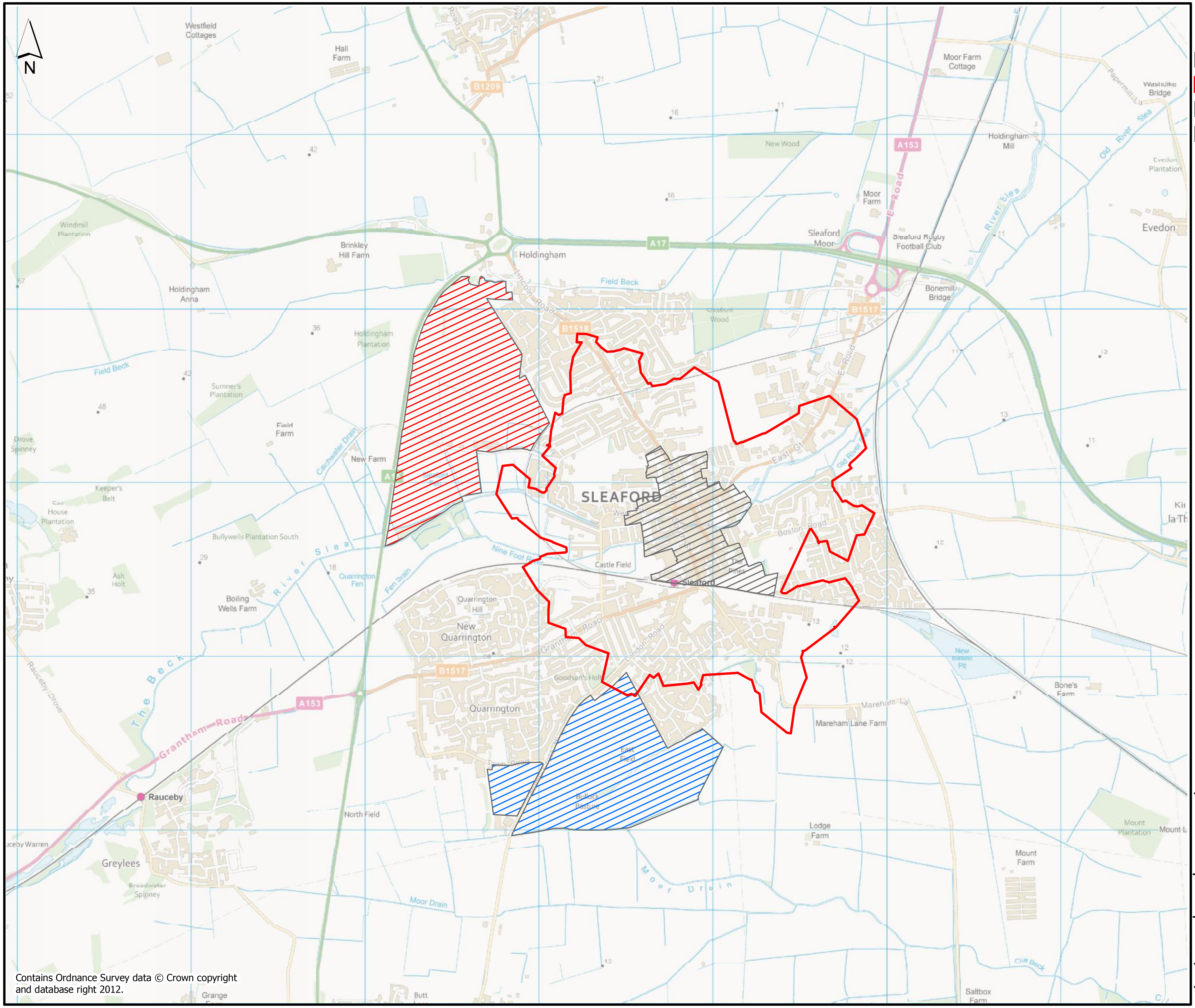
SUE Study - Sleaford

Location of Libraries with 800m Pedestrian Catchments

Scale @ A3 1:20,000

Plan 5



Legend

- Sleaford Town Centre
- 800m Pedestrian Catchment
- Sleaford South Quadrant
- Sleaford West Quadrant

Notes

* Links without pedestrian footway provision are excluded from the catchments

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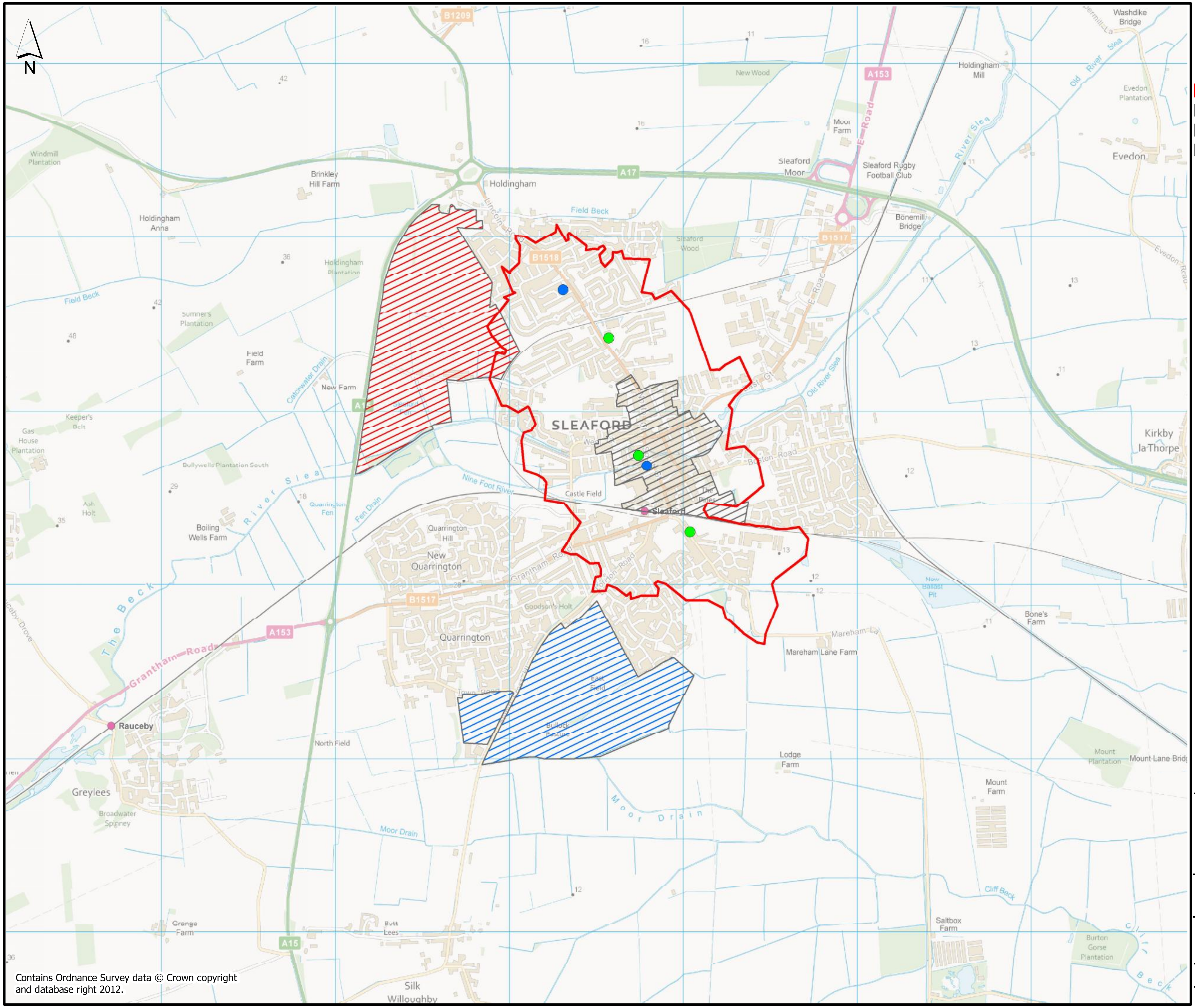
SUE Study - Sleaford

Location of Sleaford Town Centre with 800m Pedestrian Catchment

Scale @ A3 1:20,000	Plan 6



Legend

- Food store with sales area up to 500 sqm
- Food store with sales area between 500 > 1500 Sqm
- 400m & 800m Pedestrian catchments
- Sleaford Town Centre
- Sleaford South Quadrant
- Sleaford West Quadrant

Notes

*Catchment of 400m around food store with sales area of up to 500 sqm.

*Catchment of 800m around food store with sales area between 500-1500 sqm.

*Catchments exclude links with no pedestrian footway provision.

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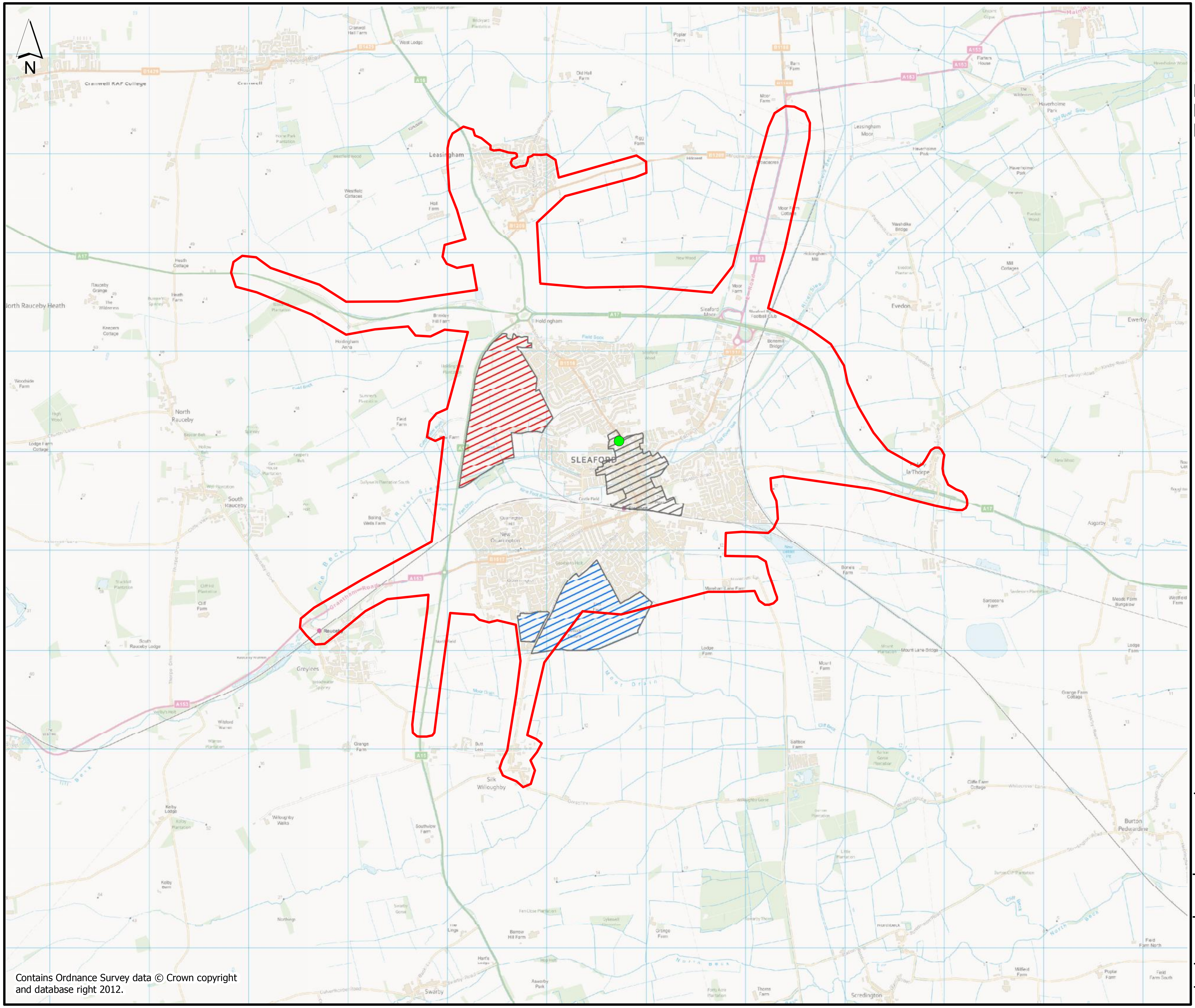
SUE Study - Sleaford

Location of Food Stores with up to 1,500 Sqm with Pedestrian Catchments

Scale @ A3 1:20,000

Plan 7



Legend

- Food store with sales area greater than 1,500 Sqm
- Five minute drive time isochrone
- Sleaford Town Centre
- Sleaford South Quadrant
- Sleaford West Quadrant

Quay West at MediaCityUK
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SUE Study - Sleaford

Location of food stores with sales area greater than 1,500 Sqm & 5 minute Drive time Isochrones

Scale @ A3 1:35,000	Plan 8

Appendix IV – Quantitative Assessment of Available 'Top Up' Food Shopping Expenditure to Support Additional Food Retail Pr

APPENDIX 4: QUANTITATIVE ASSESSMENT OF AVAILABLE 'TOP UP' FOOD SHOPPING EXPENDITURE TO SUPPORT ADDITIONAL PROVISION

Table 1: Proposed Number of Residential Dwellings in Each SUE Over the Plan Period and Beyond

SUE	Proposed Dwellings at 2031	Population Density	Proposed Population at 2031	Total Proposed Dwellings	Population Density	Total Proposed Population
Lincoln Western Growth Corridor	2,700	2.3	6,210	3,100	2.3	7,130
Lincoln South East Quadrant	2,800	2.4	6,720	6,000	2.4	14,400
Lincoln North East Quadrant	1,400	2.3	3,220	1,400	2.3	3,220
Gainsborough Southern Neighbourhood	2,500	2.3	5,750	2,500	2.3	5,750
Gainsborough Northern Neighbourhood	2,400	2.3	5,520	2,400	2.3	5,520
Gainsborough Eastern Neighbourhood	2,100	2.3	4,830	2,100	2.3	4,830
Sleaford West Quadrant	1,600	2.4	3,840	1,600	2.4	3,840
Sleaford South Quadrant	1,750	2.4	4,200	1,750	2.4	4,200
Total	**17,250**		**40,290**	**20,850**		**48,890**

Note: Proposed dwelling numbers derived from Lincolnshire Core Strategy Partial Draft Plan for Consultation (June 2012). Population density derived from 2011 Mid-Year Lincolnshire Population and Household Estimates Reference Sheet (Lincolnshire County Council Research & Information Team, September 2012)

Table 2: Estimated Convenience Goods Expenditure Available in Each SUE Over the Plan Period to 2031

SUE	Proposed Population at 2031	Per Capita Convenience Expenditure at 2011 (£)	Per Capita Convenience Expenditure at 2011 without SFT (£)	Per Capita Convenience Expenditure at 2031 without SFT (£)	Estimated Available Convenience Goods Expenditure at 2031 (£m)	Estimated Available 'Main Food' Convenience Expenditure at 2031 (£m)	Estimated Available 'Top Up' Convenience Expenditure at 2031 (£m)
Lincoln Western Growth Corridor	6,210	1,751	1,720	1,917	11.9	8.7	3.2
Lincoln South East Quadrant	6,720	1,751	1,720	1,917	12.9	9.5	3.4
Lincoln North East Quadrant	3,220	1,751	1,720	1,917	6.2	4.5	1.6
Gainsborough Southern Neighbourhood	5,750	1,756	1,724	1,922	11.1	8.1	2.9
Gainsborough Northern Neighbourhood	5,520	1,756	1,724	1,922	10.6	7.8	2.8
Gainsborough Eastern Neighbourhood	4,830	1,756	1,724	1,922	9.3	6.8	2.5
Sleaford West Quadrant	3,840	1,875	1,841	2,052	7.9	5.8	2.1
Sleaford South Quadrant	4,200	1,875	1,841	2,052	8.6	6.3	2.3
Total	**40,290**				**78.4**	**57.6**	**20.8**

Note: Expenditure at 2011 relates to the existing built up area of each settlement, sourced from Experian MMG3 data report (and expressed in 2011 prices). Expenditure growth and allowance for special forms of trading sourced from Appendix 3 of Experian Retail Planner Briefing Note 10.1 (September 2012)

Table 3: Estimated Convenience Goods Expenditure Available in Each SUE Beyond the Plan Period

SUE	Proposed Final Population	Per Capita Convenience Expenditure at 2011 (£)	Per Capita Convenience Expenditure at 2011 without SFT (£)	Per Capita Convenience Expenditure at 2031 without SFT (£)	Estimated Available Convenience Goods Expenditure at 2031 (£m)	Estimated Available 'Main Food' Convenience Expenditure at 2031 (£m)	Estimated Available 'Top Up' Convenience Expenditure at 2031 (£m)
Lincoln Western Growth Corridor	7,130	1,751	1,720	1,917	13.7	10.0	3.6
Lincoln South East Quadrant	14,400	1,751	1,720	1,917	27.6	20.3	7.3
Lincoln North East Quadrant	3,220	1,751	1,720	1,917	6.2	4.5	1.6
Gainsborough Southern Neighbourhood	5,750	1,756	1,724	1,922	11.1	8.1	2.9
Gainsborough Northern Neighbourhood	5,520	1,756	1,724	1,922	10.6	7.8	2.8
Gainsborough Eastern Neighbourhood	4,830	1,756	1,724	1,922	9.3	6.8	2.5
Sleaford West Quadrant	3,840	1,875	1,841	2,052	7.9	5.8	2.1
Sleaford South Quadrant	4,200	1,875	1,841	2,052	8.6	6.3	2.3
Total	**48,890**				**94.9**	**69.7**	**25.1**

Note: Expenditure at 2011 sourced from Experian MMG3 data report (and expressed in 2011 prices). Expenditure growth and allowance for special forms of trading sourced from Appendix 3 of Experian Retail Planner Briefing Note 10.1 (September 2012)

Table 4: Estimated Convenience Goods Expenditure Available in Each SUE Beyond the Plan Period

Store Format	2011	2031
Typical Convenience Store	7,560	7,743
Big Four Convenience Store	11,865	12,152

Note: Typical convenience store turnover derived from combined average sales densities of Budgens, Co-op, Londis and Spar as reported by Mintel Retail Rankings 2011.
Big four convenience store turnover derived from combined average sales densities of Asda, Morrisons, Tesco and Sainsbury's reported by Verdict UK Food & Grocery Retailers 2012. Both in 2011 prices.

Table 6: Estimated Convenience Goods Quantitative Need in Each SUE at 2031

SUE	Estimated Available 'Top Up' Convenience Expenditure (£m)	Proportion Likely to be Spent at Local Shops within SUE	Top Up Expenditure Orignating in SUE Spent in SUE	Inflow from Other Areas	Total Top-Up Expenditure Claimed by SUE	Average Sales Density of 'Big Four' Convenience Store	Average Sales Density of Typical Convenience Store	Minimum Required 'Top Up' Floorspace Deriving from SUE	Maximum Required 'Top Up' Floorspace Deriving from SUE
Lincoln Western Growth Corridor	3.2	50%	1.6	30%	2.3	12,152	7,743	190	290
Lincoln South East Quadrant	3.4	50%	1.7	30%	2.4	12,152	7,743	200	310
Lincoln North East Quadrant	1.6	40%	0.7	30%	0.9	12,152	7,743	80	120
Gainsborough Southern Neighbourhood	2.9	50%	1.5	30%	2.1	12,152	7,743	170	270
Gainsborough Northern Neighbourhood	2.8	40%	1.1	30%	1.6	12,152	7,743	130	210
Gainsborough Eastern Neighbourhood	2.5	50%	1.2	30%	1.8	12,152	7,743	140	230
Sleaford West Quadrant	2.1	50%	1.0	30%	1.5	12,152	7,743	120	190
Sleaford South Quadrant	2.3	50%	1.1	50%	2.3	12,152	7,743	190	300
Total	**20.8**								

Table 7: Estimated Convenience Goods Expenditure Available in Each SUE Beyond the Plan Period

SUE	Estimated Available 'Top Up' Convenience Expenditure (£m)	Proportion Likely to be Spent at Local Shops within SUE	Top Up Expenditure Orignating in SUE Spent in SUE	Inflow from Other Areas	Total Top-Up Expenditure Claimed by SUE	Average Sales Density of 'Big Four' Convenience Store	Average Sales Density of Typical Convenience Store	Minimum Required 'Top Up' Floorspace Deriving from SUE	Maximum Required 'Top Up' Floorspace Deriving from SUE
Lincoln Western Growth Corridor	3.6	50%	1.8	30%	2.6	12,152	7,743	210	330
Lincoln South East Quadrant	7.3	50%	3.7	30%	5.2	12,152	7,743	430	670
Lincoln North East Quadrant	1.6	40%	0.7	30%	0.9	12,152	7,743	80	120
Gainsborough Southern Neighbourhood	2.9	50%	1.5	30%	2.1	12,152	7,743	170	270
Gainsborough Northern Neighbourhood	2.8	40%	1.1	30%	1.6	12,152	7,743	130	210
Gainsborough Eastern Neighbourhood	2.5	50%	1.2	30%	1.8	12,152	7,743	140	230
Sleaford West Quadrant	2.1	50%	1.0	30%	1.5	12,152	7,743	120	190
Sleaford South Quadrant	2.3	50%	1.1	50%	2.3	12,152	7,743	190	300
Total	**25.1**								